
REPORTS OF COMMITTEES 2020–2021

July 2021

| | |
|---|-----|
| Aspiring Educators..... | 3 |
| Educator Voice, Professional Rights, and Authority..... | 7 |
| ESP Careers | 29 |
| Ethnic Minority Affairs..... | 35 |
| Human and Civil Rights Awards..... | 42 |
| Legislation..... | 44 |
| Local President Release Time Grants Membership..... | 47 |
| Membership Organizing | 53 |
| Professional Standards and Practice | 125 |
| Sexual Orientation and Gender Identity..... | 139 |
| UniServ Advisory | 145 |
| Women’s Issues..... | 147 |

Foreword

The NEA committee structure provides for:

- Board Strategic Committees that are aligned with the Association's Strategic Plan and Budget and advance at least one of NEA's strategic goals or objectives. The Board Strategic Committees provide a structure through which the Association benefits from the expertise and talent of education practitioners, who are also trained as higher-level decision-making leaders. The work of these committees is intended to inform and guide the advancement of NEA's Strategic Objectives;
- Social Justice and Constituency Committees that make recommendations to the governing bodies on matters of concern to constituencies they represent;
- Special committee established on an ad-hoc basis..

On May 1, 2021, the NEA Board of Directors received and acted on the 2020–2021 committee reports and recommendations. The Board action on recommendations is shown at the conclusion of each of the following committee reports.

Aspiring Educators

COMMITTEE MEMBERS

Cameo Kendrick, Chair
Kentucky

Brenda Quispe
California

Hannah St. Clair
Oregon

Yesenie Caro
Oklahoma

Nicole Ruiz
Illinois

Katie Vogt
Wisconsin

Arianna Herrington
Michigan

Derrick Sanders
Tennessee

Robert Rodriguez
Executive Committee Liaison

Larissa Lloyd
Kentucky

Richard Sequeira
California

Staff Liaison:
Andrea Prejean

Committee Overview:

The members of the Advisory Committee on Aspiring Educators (ACAE) are split into work team groups, as well as Aspiring Educators Conference sub-committee groups, to address committee charges.

Committee Charges:

1. Identify and compile promising strategies and/or practices that can be shared with and utilized by NEA affiliates and members to support recruitment and support of Aspiring Educators of color at Minority Serving Institutions (MSI) into the profession and union.

Recommendations:

The NEA will create an outreach plan to recruit Aspiring Educators of Color (AEOC), and emerging educators of color, to help them enter and succeed within the teaching professions and within the NEA's national, state, and local union structures.

The NEA will work to support Aspiring Educators of Color's professional success and NEA union leadership by: (1) creating a mentoring/training program for AEOCs and (2) identifying opportunities within its existing member recruitment, engagement and programs to increase the NEA's representation of — and support for — AEOC.

2. Collect information on successful chapters and state programs, and what makes them successful, to determine how their success can be replicated.

The AE Advisory Committee developed a rubric for determining practices of successful programs replicable to grow and develop AE state and chapter programs. The Committee recommends that the NEA pilot the [Empowered NEA Aspiring Educators Program Rubric](#).

3. Review the current AE Awards Program goals, procedures, and processes, and suggest modifications if needed.

Complete overview of revamped and suggested changes to the 2021 Virtual AEC Awards ceremony can be found on page 5.

4. Provide input to the Aspiring Educator Conference

Planning Team through the Aspiring Educator Advisory Committee Chair. Complete overview of ACAE conference subcommittees input for the Aspiring Educators Conference Planning Team can be found on page 5.

Work Team Reports:

Minority Serving Institutions (MSI) Strategies and Practices

Barriers for MSI students in the Profession and Union:

- Barriers for MSI students in educator preparation programs
- Barriers in MSI and NEA collaborations + communications
- Lack of supportive K-12 conversations around college and post-secondary education
- Aspiring Educator preparedness assessments
- COVID 19 concerns with MSIs and AEOCs
- Disparities of pandemic impact on BIPOC communities, and at MSIs

Professional and union strategies needed for MSIs and AEOCs:

- Research and reformation of educator preparation programs
- New partnerships, supports, and communications with MSIs and AEOCs
- Pathways for AEOCs into enrollment at MSIs and into the education profession from grades 6-12
- Research and reformation of educator preparedness assessments
- Continuous research on COVID implications for AEOCs and MSIs
- Informed creation and delivery of needed supports to recover from impacts of COVID pandemic

Best practices currently in use by NEA Affiliates:

- NEA work in building community partnerships
- Creates collaboration with MSIs to uplift, empower, and support Aspiring Educators of Color, and provide needed supports
- NEA EMAC/Caucuses – EMAC and Caucuses support coalitions between members and provide an opportunity of growth and mentorship for Aspiring Educators of Color.

- [Black Caucus](#)
- [Aspiring Educators of Color Caucus](#),
- [American Indian/Alaska Native Caucus](#),
- [Hispanic Caucus](#)
- [APIC](#)
- [NEA EdJustice](#)

Best practices currently used by community partners:

- [United States Hispanic Leadership Institute](#) – NEA partners with USHLI’s annual national conference and shares opportunities of leadership and support to Aspiring Educators with union membership.
- [National Immigration Law Center](#) (NILC) Human and Civil Rights in Education
- [Own the Dream, United We Dream](#)
- [Advancement Project](#)

Existing programs within private organizations:

While NEA does not currently partner with these programs, they provide examples of best practices that support Aspiring Educators of Color and MSIs.

- [The Woodrow Wilson-Rockefeller Brothers Fund Fellowships for Aspiring Teachers of Color – summer fellowships](#)
- The goal of the Woodrow Wilson-Rockefeller Brothers Fund Fellowships for Aspiring Teachers of Color is to help recruit, support, and retain individuals of color as K-12 public school teachers in the United States.
- [The White House Initiative on Educational Excellence for African Americans – Increasing Teacher Diversity](#)
- [TEACH Grants](#) of \$4,000 a year to Aspiring Educators who plan to complete coursework needed to begin a career in teaching.
- [Public Service Loan Forgiveness Program](#) – This program forgives the balance on direct loans after the borrower has made 120 qualifying payments under a repayment plan while working full-time for a qualifying employer.
- Virtual career fairs held annually for MSIs during the spring semester.
- [Educate Me](#).

[Work Team’s Collection of Further Research and Anecdotal First Hand Experience from Aspiring Educators of Color](#)

Professional Supports/Aspiring Educator to Active

Professional learning supports: In light of the COVID-19 pandemic, the needs of educators have greatly changed. This impacts Aspiring Educators and early career educators. The importance of educating through crisis—like the COVID-19 pandemic—is critical, and professional supports that support leadership, mentorship, and growth for Aspiring Educators and early career educators are essential.

Helpful professional supports for Aspiring Educators:

- [Trauma-Informed Schools](#)
- [Educating through Crisis](#): Because this resource does not currently include the Aspiring Educator lens and experience, there is a need for Aspiring Educators to gain the support needed to enter the profession post COVID-19. They also need guidance on the impact to collegiate requirements, the resources and funding

available for Aspiring Educators, and conducting virtual teaching without the necessary resources.

- The White House Initiative on Educational Excellence for African Americans – Increasing Teacher Diversity
- [Early Leadership Institute](#)
- [Early Career Learning Labs](#): The Early Career Learning Labs (ECLL) are specifically designed to create blended learning opportunities to improve student learning. Promoting this opportunity to Aspiring Educators will help guide them on whom to contact within their state affiliate to gain necessary tools that will support them as they face current problems of practice once they become early career educators.
- Virtual career fairs held annually for MSIs during the spring semester.
- [Professional Excellence from Member to Member](#)

Barriers during transition from AE to Active:

Barriers to the profession still exist that impact recruitment and retention of new educators. Aspiring Educators advocate for their future students while being college students themselves. They depend on the advocacy of the union for support. Below are systemic changes that would benefit Aspiring Educators as they transition to Active membership as early career educators.

- Aspiring Educators’ successful completion of educator preparation programs is highly impacted by their ability to afford and pass the oppressive and inequitable educator preparedness assessments.
- To help combat this, continuous research on testing issues, advocacy for replacements and reformation of how incoming educators are supported through the process of demonstrating their preparedness to enter the profession prepared to educate students in equitable, racially, and socially just classrooms and schools.
- Teacher salaries and retirement benefits impact recruitment and retention.
- Our continued advocacy for higher teacher salaries and a fair and just retirement system is pivotal to correcting this longstanding issue and barrier to educators entering the profession.
- Support and accessibility to active involvement and leadership in NEA
- The composition of the educational workforce is constantly evolving. To advocate for the future of education, it is important that NEA continues to counter ageism in the education system and support new educators and educators of color in leadership roles.

Roadmap for AE to Active: Aspiring Educators are at a crossroads in their academic and professional journeys. The experiences and specific challenges faced by Aspiring Educators hinder their ability to be successful as members of their state and local affiliates. Among these challenges are the lack of proper preparation and guidance in navigating functioning within the structure of the Association and accessing new leadership opportunities.

- Mentorship is an essential part of helping Aspiring Educators move to their new roles as Active members. Although mentorships are increasingly being defunded nationally, mentorships are imperative to gain knowledge on professional excellence practices, systems of support, and community within the

union, as well as within the school setting.

- Gathering data on the needs and input of Aspiring Educators is an opportunity to bridge the transition from pre-service to Active educators. This information will provide access to the wants and needs of our AE members, along with the future that our next generation of educators and education leaders is envisioning and advocating for as they enter into the teaching profession. This information will also allow the Association to provide AEs with the tools, professional development, and supports they need to be active leaders in the education profession, as well as to become advocates for a quality public education for all students. *State and Chapter Aspiring Educator Program Supports:*

Rubric for Empowered NEA-Aspiring Educators Programs

Our team sent out a national survey to chapter and state leaders within the Aspiring Educators Program to guide the creation of a rubric designed to help state and chapter programs assess their programs through best practices found through the data gathered, as well as anecdotal experiences and input from Aspiring Educators throughout prior years.

Survey Responses from over 50 Aspiring Ed leaders can be found [HERE](#).

Creation of the Rubric:

1. The work team contacted members through email and social media to gain responses to the survey.
2. To incentivize members, the NEA AE program funded entries by all who responded to the survey into a raffle to win one of three copies of *We Want to Do More Than Survive*, by Dr. Bettina Love. The books were purchased from Mahogany Books, a Black-owned bookstore located in Washington, DC.
3. Post-survey follow-up interviews were held to hear more in-depth experiences from AE leaders.
4. The work team spent time compiling, analyzing, and debriefing the responses, additional input, and anecdotal information from other Aspiring Educators during calls, events, and engagements through the past few years.
5. The work team began the creation of a three-level rubric, composed of four buckets in which best practices are housed to aid state and chapter AE programs to transform into supported and empowered programs.

Rubric Levels: Each level represents young, growing, and established chapters.

- Level One: Emerging
- Level Two: Transformational
- Level Three: Empowered

Rubric Buckets: Each bucket represents a different aspect of the Aspiring Educator Program that increases community, resources, leadership, and credibility within and of the program.

- **Bucket One:** Aspiring Educator Core Values
 - a. NEA AE's four core values are Educator Quality, Community Engagement, Social Justice, and Political

Action. State and chapter programs that consistently incorporate the four core values create support for their programs to become empowered groups of Aspiring Educators, because they align their programs and members with the values in which more prepared, supported, and engaged Aspiring Educators enter the profession, engage with and lead within the union.

- **Bucket Two:** Fully Funded Aspiring Educator Programs
 - b. Chapters at emerging levels often rely heavily on campus funding and fundraisers to fund the events, supports, and opportunities for their members. As state associations grow connections with AE chapters within their states, chapters can advocate for the additional funding needed to grow and support programs from their state, or local associations.
- **Bucket Three:** Aspiring Educator Voice
 - c. Aspiring Educator relations with their state union and Aspiring Educator representation at state representative assembly and state union conferences.
- **Bucket Four:** Pathways to Increased Aspiring Educator Leadership
 - d. The NEA Aspiring Educators Program works to develop and empower current and future educator leaders. Chapters can grow this bucket by expanding diversity of leadership within their local chapters and their state leadership teams.

Final Work Team Notes:

- The rubric for Empowered Aspiring Educator Programs is an incredible pairing with the use of the [2021 NEA AE Chapter Toolkit](#). The NEA AE Chapter Toolkit provides resources on how to establish a new chapter, chapter constitution and planning, chapter organization, and many other resources. This toolkit is an incredibly valuable resource for new college students who do not have a chapter on their local campus, or are needing help organizing, strategizing and growing existing chapters.
- Within the rubric, chapters will likely fall into different levels for each bucket. The rubric is meant to be a guide, created with the voice and experience of Aspiring Educators, to where chapters can grow from where they are for each individual bucket.
- Each level is broken into a “Glow” and “Grow” for the buckets. Glows are celebrations for that level of chapter. Grows are suggestions to reach the next chapter level. We chose to highlight each level through both Glows and Grows because each level is one to be proud of!

Find the Rubric Here:

[Empowered NEA Aspiring Educators Program Rubric](#)

Conference Sub-Committee Reports

Awards and Elections: The Awards and Elections Subcommittee, recommended a revamp of the NEA AEC Awards ceremony. In an effort to amplify and re-engage AE members in the application for and celebration of the Annual Aspiring Educator Awards Ceremony, the 2021 Virtual AEC will include the first annual *GramAE* Awards. Within the ceremony format, there is a space for Aspiring Educators to celebrate in a theatrical and red-carpet style

celebration of the achievement of fellow Aspiring Educators across the country. The attendees of the conference will receive packages prior to the Conference with all the things they need to enjoy the ceremony and live entertainment throughout the *GramAE* celebration. The committee recommends that the Program convert to an electronic application format.

Digital Engagements: The Digital Engagements Subcommittee worked throughout the year to strategize, reorganize, and amplify the social media platforms of the Aspiring Educators Program in a more cohesive way in partnership with NEA. Additionally, the committee recommends continuing the social media daily celebrations for attendees during the conference.

Community Builders and Self Care: The committee recommends an intentional push and transition to create the AEC union member communities to engage together in community building opportunities, rather than the culmination with an end of conference project. The committee also recommends creating a space for the small group communities to come together in advance of the Conference, rather than the first day of the AEC. The committee recommends multiple offerings during the self-care sessions during the AEC.

| Committee Recommendations | Board of Directors Action |
|---|---|
| Charge 1: <i>Identify and compile promising strategies and/or practices that can be shared with and utilized by NEA affiliates and members to support recruitment and support of Aspiring Educators of color at Minority Serving Institutions (MSI) into the profession and union.</i> | |
| 1. That NEA create an outreach plan to recruit Aspiring Educators of Color (AEOC), and emerging educators of color, to help them enter and succeed within the teaching professions and within the NEA’s national, state, and local union structures. | Adopt as part of our work to recruit and retain educators of color in the teaching professions. |
| 2. That NEA work to support Aspiring Educators of Color’s professional success and NEA union leadership by creating a mentoring/training program for AEOCs | Refer to Executive Director /Budget Committee |
| 3. That NEA work to support Aspiring Educators of Color’s professional success and NEA union leadership by identifying opportunities within its existing member recruitment, engagement and programs to increase the NEA’s representation of – and support for – AEOC | Adopt |
| Charge 2: <i>Collect information on successful chapters and state programs, and what makes them successful, to determine how their success can be replicated.</i> | |
| 4. That NEA pilot the Empowered NEA Aspiring Educators Program Rubric . | Refer to Executive Director |

Educator Voice, Professional Rights, and Authority

COMMITTEE MEMBERS

Martha Patterson, *Chair*
Silverdale, WA

Stephanie Gallardo
Burien, WA

Gilda Morgan-Williams
W. Palm Beach, FL

Barbara Cady
Huntsville, AL

Paul Guess
Platte City, MO

Tucker Quetone
Rochester, MN

Rachel Croft
Carson City, NV

Bernadette Hampton
Beaufort, SC

Ashanti Rankin
Bridgeton, NJ

Nichole DeVore
Sacramento, CA

Stephanie Ingram
Dover, DE

Judy Rohde
Shoreview, MN

Scott DiMauro
Columbus, OH

Mark Jewell
Raleigh, NC

DeWayne Sheaffer
Long Beach, CA

Carol Fleming
Little Rock, AR

Cameo Kendrick
Lexington, KY

Staff Liaisons:
Brian Beallor
Shyrelle Eubanks
Elic Senter
Dale Templeton

Marty Fridgen
Lake Elmo, MN

Mindy Layton
Bountiful, UT

Charge:

Using an easy-to-navigate, inquiry-based format (including but not limited to informational surveys and one-on-one conversations), gather information from state and local affiliates regarding successful adoption of student-centered policy through amplified educator voice (as previously defined by the *Educator Voice and Professional Rights & Authority Committee*). Information requested in inquiries should include:

- the policy language itself (or a link to the language online)
- the impact of the policy on students.
- member/educator involvement in the development of the policy language.
- strategies that lifted and amplified educator voice that were utilized in moving the policy.
- coalition partners in the work of achieving the policy win.
- implementation success and challenges.

Synthesize key findings in a collective report, which also lifts 'lighthouse' examples of success for affiliates across the organization.

Committee discussion: In the first meeting, members of the committee agreed that holding one-on-one conversations with state and local presidents, Directors, and members was the best strategy for gathering examples of student-centered advocacy. The committee members developed a questionnaire to guide the discussions and agreed to conduct and document interviews and collect

examples of policy language.

In the following meeting, committee members provided updates on the interviews and discussed the challenges with collecting interviews generally or finding examples of student-centered advocacy. Members shared promising examples, including district policy and contract language related to student centered advocacy. The challenges included finding examples of student-centered advocacy within the Aspiring Educator program.

Utilizing survey questions developed by the committee, members were tasked with holding one-on-one conversations with state and local presidents, members, and Directors to gather information from state and local affiliates regarding successful adoption of student-centered policy through amplified educator voice (as previously defined by the Educator Voice, Professional Rights & Authority Committee (EVPRA)). Conversations took place with state and local presidents and other officers, board members, committee chairs, and other rank-and-file members and activists from K-12 certificated and ESP along with Higher Education.

As defined previously by the EVPRA Committee, educator voice is the use of collective action and political power to influence decisions, policies and laws that impact public education. The following is a summary of the findings from those conversations.

How have you used Educator Voice and Professional Authority to engage students and families in

identifying issues to organize your local or state affiliate advocacy?

Communication

Local affiliates have focused on increasing and improving communication to identify and solve issues with their members, district administration and local school boards, students, parents, and community. To this end, locals have followed tried and true methods of one-on-one conversations and surveys, as well as providing training and guidance to educate parents about how to access district resources and information and utilizing NEA's Opportunity Checklist.

Parent, Community, and Student Engagement

Whether through a bargaining campaign, political action, or other advocacy, locals are finding ways to engage and develop relationships with parents, members of the community, and students. Circumstances brought upon by the COVID-19 pandemic have made it necessary and vital to broaden stakeholder involvement as concerns related to educator and student safety, mental health, equity, and the return to in-person learning were shared by everyone. In some cases, where questionable decisions were being made by districts and a negotiated agreement ensuring safety and equity could not be reached, the power of the union and community together were necessary to leverage a settlement after educators walked off the job to the picket lines after authorizing a strike. Affiliates have taken advantage of public events and social media to engage the community on important political issues, such as the impact of local property taxes on school funding.

Collaboration

In affiliates that can collectively bargain with their employers and those in non-bargaining situations, collaborative practices take place in many different shapes and forms. Local leaders hold regular meetings and participate on committees with state and local superintendents, board members, and other decision makers in order to promote communication and transparency while jointly identifying issues and finding solutions.

Bargaining and Advocacy

Engaging in all of these practices – communication, parent/community/student engagement, and sometimes collaboration – locals look to address issues, some monumental and others small but important, through processes such as collective bargaining, influencing board policy, organizing voters around ballot initiatives, passing New Business Items through internal union processes, taking a position on an issue expressed through a resolution, and others. The issues state and local affiliates face and the methods that they engage in to advocate around those issues are very unique to the localized situation, but as they say, there is more than one way to skin a cat!

Racial and Social Justice

As alluded to above, the issues that educators, students, parents, and community face can range from those that are monumental to others that may be small, but are still important. Of course the COVID-19 pandemic is one of the biggest issues ever faced in our lifetimes, but possibly no issue is as monumental and systemic as the issue of racism. In fact, the pandemic has both brought upon new, and shed light on existing, issues faced by

our BIPOC educators, including early career educators, students, and communities. Both prior to the pandemic and during it, affiliates are using their educator voice to tackle those issues and face white supremacy culture head on. They are engaging parents and communities in the work of equity and inclusion in access and curriculum, bringing awareness to the fact that black lives do matter, empowering students to demand change in policies and other racist structures, pushing districts to step up and do more to create change, and looking internally at their own union structures and processes through a lens of equity and inclusion.

Can you provide the bargained language or policy that was adopted? What motivated or inspired you to create the policy/change that you did?

Examples of bargaining language, adopted policies, resolutions, and other codified provisions are attached.

One statement by an interviewee seems to sum up the motivation and inspiration for why educators and their unions do what they do: "We take very seriously as leaders our responsibility to impact change." Affiliates consistently use their platform as an organized force for power to do what's best for students. From ensuring equity and inclusion to safe working and learning environments to recruitment and retention, students always have and always will be the primary focus of any concern or issue.

What processes did state/local affiliate use to create space and amplify educator voice to adopt student-centered policy?

At the local level, affiliates used these processes:

- Member/community engagement:
 - a. Surveys
 - b. Forums
 - c. Town halls
 - d. Organized meetings
 - e. School visits
 - f. Listening sessions
- Improved communication
- Strengthen internal structures
- Establish relationships and develop partnerships with community
- Collaboration with district
- Professional development and training
- Use of outside expertise
- Communication and connection with other leaders
- Analysis and strengthening of internal processes

The state and national affiliates assisted through:

- Supporting training on bargaining, communication, and organizing
- Providing materials and resources
- Financial support
- Technological support
- Expertise on racial/social justice issues to facilitate and create change both internally and externally

What other organizations or community groups were involved or engaged in your action?

Along with differing issues are different types of organizations and community groups that local and state affiliates engaged with in their advocacy. One common theme

is evident though, “The power of solidarity and collaborative engagement with partners can always impact change,” as one interviewee stated in their response. Affiliates engaged with communities of color, the religious community, other NEA local affiliates and unions outside of NEA, political clubs, district committees, school boards, internal union groups, business groups, expert consultant groups, PTAs, student groups, racial and social justice organizations and groups, and NEA state and national affiliates.

How have student-centered policies guided your collective bargaining priorities?

Affiliates have placed students at the forefront of their bargaining and advocacy priorities. A common phrase we all hear is educators’ working conditions are students’ learning conditions and that is absolutely true when it comes to how many locals approach their thinking around issues. Whether the issue is lowering class size, reducing the amount of testing and assessments students are required to take, or valuing the profession by paying comparable salaries and benefits to recruit and retain the highest of quality educators and ESPs, great working conditions make for great learning conditions.

Affiliates engaged in tackling racial justice issues and taking on white supremacy culture follow practices of analyzing all issues through a lens of equity and inclusion, while also making sure to reach out to the most marginalized students, families, and educators themselves. Locals are bringing racial justice issues to the bargaining table, developing model language for BIPOC early career educators, pushing the district to change policies and establish new structures that focus on diversity and inclusion, and are even looking internally at their own structures and practices to be more representative and inclusive of their membership and students.

How does this member driven policy consistently provide opportunities and support to elevate the experiences and voices of our minority students to the forefront of decision making processes?

When it comes to racial justice and anti-racism, educators and their unions are not just talking the talk, they are walking the walk. As stated previously, a common phrase in the profession is educators’ working conditions are students’ learning conditions. Some of our affiliates not only see educator working conditions as their wages, hours, and terms and conditions of employment, but also the policies, practices, and structures within their own union. Educators are always asking what voices are being excluded and how can they make sure that educator and student voices are heard in decision-making processes.

Locals are using their advocacy and collaborative practices to ensure BIPOC student voices are heard in multiple ways, such as by creating space for student leaders and female students to meet and share concerns, making sure that minority students are represented on advisory councils, establishing diversity councils, implementing continuous professional development and training, pushing for more inclusive standards to enable students to see themselves in their learning, and working to diversify the educator ranks as well as school board representation.

And they are doing the same within their locals. By creating space for greater BIPOC member voices and engagement in the union, and by continually looking internally at their own policies, practices, and structures while also looking at their collective bargaining agreements and district policies through a different lens, they are strengthening greater recruitment and retention, thereby creating greater stability for their BIPOC students.

In what areas do you see the greatest opportunities in your local or district for student-centered policy negotiation and implementation?

For many, while there is still a long way to go to impact change and make their vision of equity, inclusion, and equality for all a reality, educators have begun to see what can be made possible through their efforts. They will continue to strengthen and grow their relationships with parents and the community so that they can better understand the issues everyone is faced with and address them together. Where affiliates do not have collective bargaining rights, they will continue to push for better policies and practices, whether they can do it collaboratively with a willing set of partners or organize to leverage their power, they will do so by any means necessary. Some will continue to strive towards achieving bargaining rights hoping their District counterparts will see the value in the process.

For those that do have bargaining rights, they will continue to use their power at the negotiations table to move the needle towards equity and inclusion for both educators and their students by pushing the envelope with broader issues and strengthening those already existing in their contracts. Some may take steps towards building the power of their union and aligning more closely to the community through strategies such as Bargaining for the Common Good.

Considering we are still in the middle of the COVID-19 pandemic, potentially the biggest crisis we’ve ever faced in our lifetime, all will continue to use opportunities to bargain, collaborate, and make demands of school boards and law makers to ensure that students, educators, parents, and the community can move forward together as safely and equitable as possible, together. As one interviewee stated, “Sometimes, success comes from crisis.”

“Lighthouse” Examples of Success

1. Betsy Baker, Crisis Spokesperson for Gahanna-Jefferson Education Association (GJEA), Ohio

In their most recent contract negotiations, GJEA focused on issues brought upon by the COVID-19 pandemic. They advocated for safety, equity, and student success and when negotiations broke down over the return to in-person learning, the union went on strike.

Leading up to the negotiations and the eventual strike, GJEA leaders received a tremendous amount of support from OEA at the state level including training related to bargaining, organizing, and communication. It was because of that support that the local was able to meaningfully engage parent and community groups and ultimately gain their support in the conflict with the Board of Education. The focus on safety and equity allowed the

union to gain broad parent support, especially from black and brown families. They also engaged and received support from Central OEA/NEA (District affiliate) and other local affiliates throughout the region and across the state. After four days on the picket line, GJEA and the District finally reached agreement. The settlement included critical safety measures related to the reopening of schools, such as appropriate physical distancing and quarantine protocols; protections for students and teachers related to the livestreaming of classes; and ensuring balanced workloads, reasonable class sizes, and students' equitable access to their teachers.

Though the fortunate timing of their contract being open for full negotiations certainly made things a bit easier for GJEA to use the process to address these vital issues, it was the focus on safety, equity, and success for students, and the unified efforts of the local, that were essential in garnering and maintaining community support. In the end, this may have played the most important role in winning the strike.

While GJEA does not plan to rest on their laurels following their victory – they realize that maintaining the safety and equity protections that were won will require a continued focus on student and community engagement – they certainly learned one important lesson in reflecting on their wins: *“Sometimes, success comes from crisis.”*

2. Amanda Bearden, North Kansas City NEA (NKC-NEA) 1st Vice President, Missouri

The NKC-NEA has been taking a lead role in the planning and implementation of the work within the district around equity and inclusion. They formed a group that was dubbed the “big idea” team - made up of the local president, superintendent, association members, parents and community, and students - and worked with an outside agency called Educational Equity Consultants (EEC) (<http://eec4justice.com>) to help implement the work. From there, staff were trained as facilitators, student Diversity Councils were expanded from just high schools to all grade levels, and ongoing professional development was developed for all staff and the Board of Education.

The district and the union engaged in conversations that included members of the community around racial equity and inclusive practices. This coincided with the work that NKC-NEA has been involved in at the state and national levels of NEA. In the summer of 2020, they organized “Community Conversations” to discuss the impact of policing on race following the tragic murders of George Floyd, Breonna Taylor, and Ahmaud Arbery. These conversations laid the foundation for discussions related to returning to school in the midst of the COVID-19 pandemic.

Collaboration between the District and the union also led to the creation of new statements and policy:

- NKC Schools Equity Statement (<https://www.nkc-schools.org/equity-statement>)
- NKC Schools Diversity Statement (<https://www.nkcschools.org/Page/4219>)
- NKC Schools Educational Equity Policy (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=110&revid=82igkKs12YP7KRrN162xplusQ==&>)

[PG=6&st=equity&mt=Exact](#)

It is because of this collaboration that students of color are now better represented on district advisory committees. Staff professional development and the work of the Diversity Council are continuous and ongoing. These initiatives have driven the way they approach their collective bargaining processes as well. They look at all issues through the lens of equity and inclusion. In continuing down this path into the future, the local is considering implementing a Bargaining for the Common Good strategy and expanding the involvement of students and members of the community.

3. Angie Powers, Olathe-NEA/Kansas NEA (KNEA) High School ELA and AVID Teacher, Kansas

The Olathe-NEA has been the driving force behind advocating for increased equity and inclusion within their district. In partnership with Thrive, a community organization whose mission is to advance inclusive policies in the Kansas City area schools, they have led trainings for decision-makers on the importance of inclusive policies for students. In order to ensure the necessary voices were heard, the local has held panel discussions with students and educators and have organized educators to speak at Board of Education meetings. Their efforts not only led to the creation of a Diversity and Inclusion Office and a Diversity Council with student and association representation, they also successfully pushed for sexual orientation and gender identity protections in the district's non-discrimination, bullying, and harassment policies.

In anything that the Olathe-NEA is involved in, they advocate for the inclusion of ALL voices in the decision-making process. In continuing down their path, they see tremendous opportunity in the struggle for racial justice, including restorative practices.

[Olathe Public Schools USD 233 Student Code of Conduct](#)

[Olathe Public Schools 2020-2021 Professional Policies and Professional Employees Negotiated Agreement](#)

4. Rachel Tochiki, Bellevue Education Association (BEA), BEA Secretary, WEA Board member, Early Career Educator Committee, and Special Education Transitions Teacher; Pam Wilson, Washington Education Association (WEA) Board and Executive Committee member, Co-Chair WEA Human and Civil Rights Committee, NEA Resolutions Committee, Co-Chair Pilchuk Diversity Network, Pilchuk Executive Board, K-5 ELL Teacher, Washington

The Bellevue Education Association recently called a general membership meeting to decide whether or not members would follow the directive to return to in-person learning following a decision by the school board to bring back 2nd grade students, a decision came with minimal notice or BEA input. Discussion at the membership meeting, held virtually, went on for hours before moving on to debate. When it finally began, it was essentially over before it started. The debate, monopolized by predominantly white members, was ended after hearing from just two speakers that were for and against. Angry at what had just transpired, a majority of BIPOC members of the

BEA signed onto a letter of dissent.

Following what had occurred at the meeting and the reactions and misstatements on social media afterwards, there was a strong realization that it was necessary to reform the standing rules of the union so that the voices of all members, especially BIPOC, could be heard. With the help of the WEA's Equity, Diversity, and Human and Civil Rights Departments, they analyzed the standing rules and parliamentary procedure and determined that the ability to promote or shut down speakers or the business being conducted was dependent on those members or leaders with specific knowledge and experience with the rules. Ultimately, they felt that many aspects of the rules and procedures were rooted in white supremacist culture, though most likely unconsciously to those engaged in the processes.

BEA created a working group to create new rules/procedures and that work is underway, with a goal to finish in June of this year. Through this work, it has become clear that many members, and even leaders, do not fully understand how parliamentary procedures work.

BEA is also looking at modifying the way their bargaining team is selected within the bylaws. Currently hand-picked, they are striving to achieve a bargaining team that is more representative of the membership along with the students they serve. The union firmly believes that by giving space for greater BIPOC voice and engagement,

it will contribute to greater retention of those educators. And through greater retention of BIPOC educators, they will create greater stability for BIPOC students.

The WEA and many local affiliates across the state, including BEA, are taking steps to increase equity and inclusion in many facets of their advocacy. The WEA's Human and Civil Rights Committee is working with locals to diversify the teams that they are sending to the RA and conferences as well as creating more diversity in leadership positions within the union. WEA, in collaboration with the University of Washington, has also developed Culturally Responsive Teaching training, utilized by many districts across the state. BEA is exploring potential revisions of the district grading policy and finding ways to elevate student voices related to policies, practices, and teaching and learning.

<https://www.washingtonea.org/we-are-wea/early-career-educators/for-us-by-us/>

<https://www.washingtonea.org/we-are-wea/early-career-educators/early-career-educator-resources/>

<https://www.washingtonea.org/we-are-wea/early-career-educators/early-career-educator-resources/>

[Bellview Education Association novel adoption](#)

| Committee Member | State Affiliate Member Interviewed/ State and/or Local Affiliate/Job | How have you used Educator Voice and Professional Authority to engage students and families in identifying issues to organize your local or state affiliate advocacy? | Can you provide the bargained language or policy that was adopted? What motivated or inspired you to create the policy/ change that you did? | What process did your state/local affiliate use to create space and amplify educator voice to adopt student-centered policy? | What other organizations or community groups were involved or engaged in your action? | How have student-centered policies guided your collective bargaining priorities? | How does this member driven policy consistently provide opportunities and support to elevate the experiences and voices of our minority students to the forefront of decision-making processes? | In what areas do you see the greatest opportunities in your local or district for student centered policy negotiation and implementation? |
|----------------------|--|---|--|---|---|--|---|--|
| Rachel Croft | Nevada State Education Association President | We worked at the local level to engage in issues prior to covid. We used Educator Voice with ESEA in the beginning of organizing. We used the opportunity checklist to ensure that there was communication at all sites. We also engaged members to see where we could improve ventilation systems that had to do with Covid. | Issues around school infrastructure and HVAC was not bargained in language, but it led to discussions around safe working environment. ESEA used educator voice bargaining language. It was not adopted, but they did use it to look at their own personal policies within ESEA. ESEA adopted the educator voice toolkit. They are still advocating to change policy but Covid has become a barrier. | Our state affiliate created the space to amplify educator voice by providing the student centered and educator voice toolkit to every local in the state. | So many partnerships have stopped due to covid. We reached out to some churches and to the black community. The opportunity checklist was brought to North Las Vegas churches and to the caucus sites. We also took it to some political clubs (Nevada Education Democratic Caucus) | As we set up for collective bargaining in this new academic year, we are still utilizing our educator voice toolkit and the info provided to us through the opportunity checklist. | Prior to covid we were targeting our minority students and their schools to ensure that they utilized the checklist to provide opportunities. Due to covid, we have not been able to follow up. | Our greatest opportunity in our state for our student center policy negotiations is providing specific policy ideas and implementation guides due to results based on the checklist. |
| Bernadette R Hampton | Barbie Ross South Carolina Summerville | We attended some first Friday events in town and handed | We wanted the community to understand Act | We don't have a large membership. | We have a consortium of four state locals to include Berkeley County, Charleston County, Palmetto State | We have collective action in which the | We work hard on diversifying our school board | We are encouraging our district to hire someone to provide social equality |

| | | | | | | | |
|---|--|---|--|---|---|---|---|
| <p>Education Association A High School Special Ed Teacher</p> | <p>out water bottles to show how our community is not paying property taxes on their homes for schools. We have a pretty big presence on social media. We wanted the community to understand Act 388 and its impact on funding issues in our county.</p> | <p>388 and its impact on funding issues in our county. Our school district does not have control over our school funding. We have to get funding from our local county council. We do not have a big tax base. In order for County Council to give more funding to schools they have to increase taxes which create a problem because of the size of our community.</p> | <p>However, we do reach out to our membership for input. There is no real process. We have established relationships with a lot of community stakeholders to inform them about concerns we feel need to change. Therefore, once we identify a concern, we develop a plan of action and implement it with the assistance of our community stakeholders to include our school board members.</p> | <p>Teachers Association and SC for Ed members. We work with anyone who is willing to support our concerns to be bring about changes.</p> | <p>three counties went through The SCEA PAC's process to interview candidates for local and state offices. We worked together to interview and recommend candidates who support public education issues.</p> | <p>representation during our interview process and recommendations of candidates. We are also working on getting our district to hire someone to provide ongoing professional development on social justice challenges in our district and community.</p> | <p>training for everyone in our district. Two local members have hosted Facebook live events to discuss topics and give information that impact our minority students. Both members have attended the NEA Minority Leaders training and implemented this event as a result of the training.</p> |
| <p>Bernadette R Hampton</p> | <p>The South Carolina Education Association Elizabeth Humphrey / SC/ Orangeburg County Education Association / Educator</p> | <p>Reaching out to our superintendent we to scheduled meetings with him on a regularly bases to outline my goals as a local president to share goals of my local. We mapped out a plan as a local and implemented those goals. Prior to COVID we met in person.</p> | <p>We are working on strengthening our relationship with our Teacher Forum. We have 32 schools. Therefore, we have 32 teachers who represent our teacher voices. We are working with them to share concerns and ideas with our superintendent.</p> | <p>Teacher Forum, School Improvement Committee, School Board, Family and Consumer Business partners we meet with monthly virtually to address student needs such as food deficiencies, etc.</p> | <p>We used collective actions in a right to work state. We are addressing student needs through our guidance department with the help of outside agencies such as mental health counselors and ESOL teachers. We address student needs as they arise.</p> | <p>Prior to COVID, students had school leadership which meeting with the principal. Then the principal would share student concerns with the school leadership to address and make school improvements.</p> | <p>Our greatest opportunity would be around engaging parents and improving communication with parents. There is a website which is parent and student friendly. We also have a great communication manager who shares communications in both English and Spanish.</p> |

| | | | | | | | | |
|------------|---|--|--|--|--|--|---|---|
| Paul Guess | Missouri NEA Amanda Bearden/ North Kansas City NEA 1st Vice-President | We have engaged students and families in equity and inclusion work within our district. Our local affiliate has been involved with leading the planning and implementation of this work. | However, now we continue to meet virtually with our superintendent. My local also attend local school board meetings. We also meet with my principal to establish goals to improve communication with parents. | A "big idea" team came together to discuss general direction of equity and inclusion. This group involved our local president, superintendent, association members, community members, and students. This team chose a core group of staff to explore connections to help with this work. The district contracted with an outside agency, EEC, to implement the work; staff were trained to facilitate the work. Student "Diversity Councils" were expanded from high schools to | Sophic Solutions. https://www.sophicsolutionsgroup.com/ Educational Equity Consultants. http://eec4justice.com/about/ | These initiatives have driven our collective bargaining processes to look at all issues we negotiate through the lens of equity and inclusion. | I would call it a collaborative driven policy between the local affiliate and the district administration. Students of color are better represented now on advisory district committees. Diversity Council and staff professional development are continuous and ongoing. | We do need to know more about, and possibly implement, bargaining for the Common Good that would involve and engage students and communities. |
|------------|---|--|--|--|--|--|---|---|

| | | | | | | | | |
|--|--|---|--|---|--|---|--|---|
| | Tucker Quetone Education Minnesota Bernie Burnham, Vice President, Education Minnesota | Yes, worked with one local to form a team which included students to work on equity issues. Put together bargaining language to support equity. | State Ethnic Minority Affairs Committee advocated for language to use in local bargaining. | Weekly local presidents meeting and monthly leaders of color meetings. | Isaiah (state faith-based group, Service Employees International Union | Want to make sure we are reaching marginalized students and educators | By bringing those voices to the bargaining table | Minnesota Department of Education financial task force - budget items on equity |
| | | | | all grade levels. Ongoing professional development was developed for all staff and the Board of Education. In the summer of 2020, the district organized "Community Conversations" to discuss the impact of policing on race following the killings of George Floyd, Breonna Taylor, and Ahmaud Arbery. These conversations were expanded to discuss returning to school in the midst of the Covid-19 pandemic. | | | | |

| | | | | | | | | |
|-------------------------|--|---|---|---|--|--|---|---|
| <p>Martha Patterson</p> | <p>Rachel Tochiki, Bellevue EA, BEA Secretary, WEA Board Member, Early Career Educator Committee, and Special Education Transitions Teacher and Pam Wilson, Washington EA Board and Executive Committee member, Co-Chair of the WEA Human and Civil Rights Committee, NEA Resolutions Committee, Co-Chair, Pilchuk Diversity Network, Pilchuck Exec. Board, K-5 ELL Teacher, Monroe.</p> | <p>Recently the Bellevue School Board directed 2nd graders and 2nd grade teachers to return to the buildings with minimal notice or member input. A general membership meeting was called to determine would the members return. The virtual meeting and discussion went several hours before any debate occurred, and when it began, the debate was monopolized by white secondary teachers, and the call to end debate came after just 2 speakers for and against. A letter of dissent was written and signed by a majority of the BIPOC members of BEA, to express their anger at how the meeting transpired. BEA membership realized they needed to create and utilize more inclusive standing rules to elevate the voices of all members, especially BIPOC. Pam, WEA and the Human and Civil Rights Committee got involved after</p> | <p>Due to the incident above, and social distancing, attendance at general membership meetings has increased. With that increase, more members are attending who do not understand parliamentary procedure, and even those in leadership did not have a full grasp of how to use it. The Bellevue Executive Board determined they needed to make Standing Rules changes. The BEA Exec Board sets the standing rules; their voice supersedes Sturgis. Documents will be sent in a separate e mail.</p> | <p>Washington EA provided staff from its Equity, Diversity and Human and Civil Rights departments to facilitate and create changes to the systems in place. The Human and Civil Rights Committee is working with locals (not just Bellevue) to get more diverse teams to RA, union conferences and to create more diversity in leadership positions. Washington EA has spent several years developing Culturally Responsive Teaching training with the University of Washington, which is utilized by districts statewide. Students learning is positively impacted when schools have staffs that not only reflect their student population, but staffs that understand the needs of diverse populations.</p> | <p>Since the BSD general membership meetings are closed to the public, community members were not involved at the meeting or development of the standing rules changes. However, Rachel shared that the community was pretty evenly split between parents demanding buildings open, and those wanting safety first. She describes the White Comfort group was the loudest in person and on social media. The community DID show support in the days prior to the decision, participating in a community car parade, going by all the district schools in decorated cars showing support. Many other local education associations participated, as well as WEA President Larry Delaney.</p> | <p>A separate proposal is in the works to change to BEA union bylaws to change the bargaining team structure. At the present time, the team is handpicked. The ultimate goal is to form a more representative bargaining team, representing BEA membership and the students they serve. Union bargained beliefs are student centered issues. Issues like health care, insurance, family leave and compensation trickle down to our students. Educators who feel valued and are treated respectfully will stay in a district. Teacher retention creates stronger schools and are better for our students.</p> | <p>Greater BIPOC voices and engagement in the union equals greater retention of BIPOC educators and creates greater stability for our BIPOC students.</p> | <p>Bellevue is a very geographically divided community. The Title 1 schools are all in the same neighborhood. The demands at the Dual Language schools have a hard time retaining teachers, as the demands of the job are unattainable. The school board and district leadership are very paternalistic. BSD has a Diversity Specialist, though Rachel stated that it seems they were hired to "make diversity palatable" for the white majority. The BEA Exec. Board and a few members of the school board have participated in ongoing Culturally Responsive trainings together, though the school board president chose not to participate. Rachel also sees revising the district grading policy as a need. Parents and staff have differing opinions on the purpose of grades, ranging from meaningless, to motivating, to a gateway to a prestigious college.</p> |
|-------------------------|--|---|---|---|--|--|---|---|

seeing reactions and partial truths of what happened on social media. The HCR committee met to discuss how parliamentary procedure can be used; it can be used equally to promote or shut down a resolution or speaker, depending on who knows the rules of parliamentary procedure. The committee determined that much or parliamentary procedure is rooted in White Supremacist culture. The HCR Committee is working with Bellevue EA's Exec. Board to change the standing rules. BEA created a work group to create new standing rules; currently it is a work in progress, being utilized at all meetings, with the final decision to be made in June of 2021. The board created a document to evaluate proposed Standing Rules, and the new /proposed standing rules as they are tried out. (Documents will be attached to a

By changing standing rules and parliamentary procedure, this will impact who will get heard, not just the loudest or most available.

| | | | | | | | | | |
|------------------|--|---|---|---|--|-----------------------|---|--|---|
| Martha Patterson | Washington Education Association Stephanie Gallardo, Washington EA, Fife EA, Social Studies teacher, WEA/NEA Board Director | partnered with local organizations, Latino Heat, and Parents of Black Scholars. Equity was not a bargaining issue in the local unit "It" became an issue. | A New Business Item was passed at the 2018 state RA, creating the Early Career Educators Committee. Activities have included a retreat, an Early Career Educator book club, a subcommittee to specifically improve bargaining contracts for early career educators, and the creation of a summer webinar series specifically addressing issues related to Early Career BIPOC Educators. | Subcmte is currently working on creating model language for contracts to help retain Early Career Educators. Stephanie was appointed ECE Committee Chair as one of her WEA Board duties but created the summer webinar series as an extension of the ECE work. She was motivated to create the series wanting to do something WEA had not done before. Additionally, the loss of her father, George Floyd's murder and the Black Lives Matter movement inspired her to do something for many to be a part of. | WEA provided a staff member, funding and technology support to make the committee and webinar happen. By amplifying the voices of BIPOC members, retention of BIPOC teachers is improved. When BIPOC students have BIPOC educators the voices and needs of BIPOC students are amplified. | Local WEA affiliates. | Sub committee from the ECE committee is currently working on creating model language for contracts to help retain BIPOC Early Career Educators. | The webinar gave BIPOC members a place to meet and share. The series received approximately 100,000 online views total. Each session had a different focus: Black Educators Forum, BIPOC Educators in Rural Communities, Elementary Educators, and BIPOC LGBTQ Educators. Representation Matters and giving BIPOC Educators a space to speak and share trickles down to students, meeting their needs too. | WEA, in conjunction with the Washington State Office of the Superintendent of Public Instruction has just introduced the NAKIA Academy, a mentorship program for Early Career Educators of Color. Mentors will be paid; OSPI will lead the training. Within her district Stephanie sees the greatest opportunity in organizing for Black colleagues, as they only make up about 2% of the staff but are leaving the district at the highest rate. |
|------------------|--|---|---|---|--|-----------------------|---|--|---|

| | | | | | | | | |
|-----------------|---|---|---|---|---|--|--|---|
| Margaret Powell | North Carolina Wake NCAE | Yes, we have used surveys to interview parents and students with conversations centered around COVID and re-entry to face to face instruction. Meetings are help with key decision makers and School Board Members. | Wake NCAE has been able to develop policy with regarding virtual learning and face to face instruction. There have been meaningful conversations with School Board Members, District level administrators, and state legislators to help them better understand the needs of educators during crisis. Comprehensive policy has been developed to help guide staff, parents and students during re-entry and face-to-face instruction. | We have done surveys, open member forums, Zoom Meetings, one-to-one conversations, parking lot school visits, and town halls to better understand the needs of our members and community. | Carolina Federation has been one of our key stakeholder partners during this work. | We do not have collective bargaining, but we use our collective power to move action and policy. We have impacted change by increasing the local supplements of our educators and raised pay for our ESPs to \$15 an hour. | We have areas of opportunity with our BIPOC students and members to enact positive change. We have a weekly group called Sister Speak the meets with female BIPOC students to allow their voice and concerns to be elevated. | We have an opportunity to address SROs in our schools. Our schools could benefit greatly from an increase in school counselors, nurses, social workers, and psychologists. My local can influence policy and decisions to address these inequities throughout the district. |
| Mark Jewell | North Carolina Turquoise Lejeune Parker/Durham Association of Educators/NEA Director | Helping families to connect to the cultural wealth of the parents and community. Breaking down communication barriers and social institutions. Literacy is liberation. | We passed three powerful resolutions in a five year span. A free speech resolution, the community school's resolution, and the Black Lives Matter a School Week of Action. We also fought and won stopping | We do every second Tuesday Meetings. They are action and solution-oriented meetings. It also gives them a space to share. We break into small groups and talk about what action we are working. | Our local leadership went on a school tour with local leaders who were connected and engaged in the community. We shared the visits on social media and blogs. We went to community events, set up tables and begin talking people to build, connect with established relationships in the community. | Though we are non-bargaining, we make sure that student experience is the educator experience. If we are all looking out for each other, then teacher resources support student sources. We have been very | Durham is a majority BIPOC student enrollment. The students are at the center of every discussion we have at DAE. We survey our members, parents, and community stakeholders all the time. We reach out our | Communication with families is essential. We make sure that folks are offering opportunities to understand our community. Understanding cultural wealth. |

charter privatization.

effective in influencing policy for school return to face-to-face learning.

advocacy center to make sure our actions are in line with the state law. Our language in always in community speak and not educator language. We make sure we are meeting the needs of our members and families and considerate of their schedules.

| | | | | | | | | |
|-----------------------|---|--|--|---|---|--|--|---|
| Lindsay Buck | Kansas NEA Angie Powers/Kansas NEA/Olathe-NEA/High School ELA and AVID teacher | Yes, I helped organize advocating for adding sexual orientation and gender identity to our district non-discrimination policy, as well as our bullying/harassment policy, a couple of years ago. | See attached | Our local partnered with a community organized named Thrive whose mission was to advance inclusive policies in our KC area schools. Ultimately, we held trainings for decision-makers on WHY inclusive policy is important for students. We also included educator voice by having a student/educator panel, and one of our local members spoke about how important policy was to her. Our local also organized educators to speak at Board meetings. | See above. | Our local had been the one most involved with advocating for more equity and inclusion training and practices in our district. While this didn't necessarily become a bargaining issue, our efforts did move the needle in formulating a Diversity and Inclusion office with staff dedicated to only these issues. We have a Diversity Council on which there are two association representatives, as well as student representatives. | When we are involved, we ask what voices are being excluded and how we can include educator AND student voice in decision-making. | Racial justice and restorative justice |
| Gilda Morgan Williams | Florida Local | No | We don't use the tool. | N/a | Have partnered w local businesses for membership activities for book drives. | Na | Helps minority families become more literate | Na |
| Mark Jewell | North Carolina Tamika Walker Kelly, NCAE State President | As State President we have meetings with the State Board on advocating for inclusive Social Studies standards with a culturally responsive | We have worked with our coalition partners, the Governor's office, high school students to receive feedback to | We have done a number of things to gather input from educators. We have done mass town halls, listening sessions, Regional Town | NC NAACP, Poor Peoples Campaign, The Public School, Equality NC, Public Schools First NC. | All of our priorities are student centered. We survey our members to determine their priorities. | More inclusive standards allow students to be able to see themselves in learning, in the community, and pushing for examination of | More engagement in electoral politics and testing and assessment. |

| | | | | | | | | | |
|---------------|---|---|---|---|---|--|---|---|---|
| Paul Guess | Missouri NEA Justin Corcoran/ Smithville NEA Treasurer | Smithville NEA worked with district administration to develop a plan for students to return to school during the pandemic. Some families wanted an immediate full return while many staff felt that doing so without staff vaccinated would be unsafe. SNEA developed a plan in collaboration with the district and presented it to the Board of Education. | No policy was adopted and SNEA is not a bargaining district. The motivation was driven by the BOE directives to have a process to move secondary students back into an in-person instructional model. | GIEA leaders received bargaining, communication and organizing training led by OEA staff, and with that support, GJEA was able to meaningfully engage parent and community groups to win their support in their dispute | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | GJEA advocates for safety, equity and its recent contract negotiations with its school district. The local went on strike when negotiations broke down over details regarding its back-to-school plan earlier this school year. The strike lasted for four days. | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and |
| Scott DiMauro | Ohio Education Association Betsy Baker, Crisis Spokesperson for Gahanna-Jefferson Education Association | GIEA advocated for safety, equity and student success in its recent contract negotiations with its school district. The local went on strike when negotiations broke down over details regarding its back-to-school plan earlier this school year. The strike lasted for four days. | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | GIEA leaders received bargaining, communication and organizing training led by OEA staff, and with that support, GJEA was able to meaningfully engage parent and community groups to win their support in their dispute | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and |
| Scott DiMauro | Ohio Education Association Betsy Baker, Crisis Spokesperson for Gahanna-Jefferson Education Association | GIEA advocated for safety, equity and student success in its recent contract negotiations with its school district. The local went on strike when negotiations broke down over details regarding its back-to-school plan earlier this school year. The strike lasted for four days. | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | GIEA leaders received bargaining, communication and organizing training led by OEA staff, and with that support, GJEA was able to meaningfully engage parent and community groups to win their support in their dispute | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and | The settlement included critical safety measures related to the reopening of school buildings, including physical distancing and quarantine protocols, as well as protections of students and |

teachers related to livestreaming of classes. Ensuring balance in workloads, reasonable class sizes, and equitable access for students to their teachers were critical components of their settlement.

with the Board of Education.

addressed because GJEA was in contract negotiations and its collective bargaining agreement had not been settled after the previous master agreement had expired the previous summer. Because economic issues were settled earlier, it meant that the issues still pending during the strike were all directly connected to the ability of the district's educators to safely and equitably meet the needs of their students. Vital protections were won as a result of the local's unified efforts and the fortunate timing of being able to address these issues while their contract was open for negotiation (as opposed to requesting a reopening or

members have led the effort in their district for training related to equity literacy, cultural competency, and restorative practices. Safety and equity issues addressed in negotiations allowed the local union to gain support from parents broadly, and especially from parents of black and brown students.

| | | | | | | | | |
|---------------|--|---|--|---|--|---|---|--|
| Scott DiMauro | Ohio Education Association Karissa Wooddell, Crisis Spokesperson for the Switzerland of Ohio Education Association (SOEA) | With a focus on the negative impact on students resulting from underpaid teachers and the resulting high rate of staff turnover, SOEA utilized effective organizing strategies to win broad public support in its campaign to win a fair collective bargaining agreement. Switzerland of Ohio is the state's largest district in terms of geographic area and historically one of the lowest paid districts in all of Ohio. | 16% salary increase over three years; addition of MA+15 column to salary index; stipend for remote teaching to address additional workload with online learners; bonus pay generated from oil and gas revenue; additional pay for assigned students who exceed class-size limits; educator voice on implementation plan for state's new teacher evaluation system. When adding various changes together, bargaining unit members are receiving total increases of 20-22% in compensation this year compared to last year. It is expected that this will have a significant impact on recruitment | Local leaders and members had great support from their Labor Relations Consultant (UniServ Director) and bargaining, organizing, and communications training from a range of OEA staff members, particularly related to framing their issues. | Other local unions from both within and outside the OEA/NEA family were engaged and supportive, as were parent groups and members of the local business community. | MOU). The collective bargaining priorities were ostensibly focused on the economic interests of the members, but it was the impact on students that led to the community support that made the successful settlement of the contract possible. | This particular local is economically disadvantaged but racially homogenous, so the voices of minority students were not a factor in this particular struggle, but issues of educator recruitment and retention are significant in many of our locals that serve diverse student populations. In fact, some of our greatest challenges with educator recruitment and retention are in communities of color. Ensuring economic justice for educators should align with our goals for social, racial and economic justice for our students. | Winning on the big economic issues in this contract should lay the foundation for further improvements on teaching and learning conditions for students in future negotiations and ongoing engagement with students and parents in the meantime. |
|---------------|--|---|--|---|--|---|---|--|

| | | | | | | | | |
|------------------|---|---|---|---|--|---|---|---|
| DeWayne Sheaffer | California Vivian Zimmerman - Illinois | YES | Organized local and formed my union. Exhausted for being treated poorly and invisible | Cannot recall | The Illinois Education Association and NEA's Emerging Leaders Academy | Have not. | This question does not apply to institutions of higher ed especially community colleges. | Growth increase in terms of mentoring and cost of attending higher ed. The use of the CARES dollars used in assisting non pell grant recipients. Organize a marketing plan to encourage students to participate. |
| DeWayne Sheaffer | California Teachers Association Alec Thompson - Michigan | Have not use this modality! | None was created. The bargaining language is centered on the student experienced in a given course. | This is the shared governance with the Academic Senate takes the lead on this issues within higher ed. | The Academic Senate which is elected by campus faculty | Not at all! Students are at the center of instruction. | Working with Student Affairs where student organizations can participate. | Student Affairs! |
| Judy Rohde | Education Minnesota Retired Kate Smith, President of Dakota County United Educators (DCUE) Minnesota | a. I can think of two issues recently that DCUE took on that led to change in our district. First, four years ago we took bargaining all the way to mediation to make a statement about the amount of assessments that are required for our earliest learners. We had tried | We had tried advocating outside of bargaining for year with no success. So, we refused to settle until the district would REALLY talk to us about our concerns. | We tried mediation but it was not successful. So, we refused to settle until the district would REALLY talk to us about our concerns. | a. We did try to engage the community with learning sessions on the importance of play in the earliest years. We had less than 10 parents come to a training session. No formal community groups, but we did try to engage parents. b. There are several local community groups we are coordinating actions with for this issue. "Community Members for Anti-Racist Education in District 196" and "Equity in Education Community Coalition". | a. Students were our motivation. They were not getting enough learning time and too much testing time. Students were stressed out and falling behind because we were so busy assessing, teachers never had time to teach. | a. Students were our motivation. They were not getting enough learning time and too much testing time. Students were stressed out and falling behind because we were so busy assessing, teachers never had time to teach. | We were successful in getting the district to reduce the number of required assessments and formed several collaborative committees to continue to work on curriculum issues. The district has now hired a Director of Equity and Inclusion and is taking a more public stance in the face of white supremacy in our community. Our union |

advocating outside of bargaining for year with no success. So, we refused to settle until the district would REALLY talk to us about our concerns. We were successful in getting the district to reduce the number of required assessments and formed several collaborative committees to continue to work on curriculum issues.

b. More recently, we have been working on racial and social justice issues with our district. The school board and district administration were not supporting a teacher who read the book, "Something Happened in Our Town". The district has now hired a Director of Equity and Inclusion and is taking a more public stance in the face of white supremacy in our community. Our union has formed a social justice committee and BIPOC educator affinity group that has more involvement than any other committee.

teachers never had time to teach.

b. This action was taken on behalf of a BIPOC educator and all BIPOC students in our school system. We're taking on systemic racism.

b. This action was taken on behalf of a BIPOC educator and all BIPOC students in our school system. We're taking on systemic racism.

has formed a social justice committee and BIPOC educator affinity group that has more involvement than any other committee.

| | | | | | | | | |
|--------------|--|---|---|---|---------------|--|--|---|
| Lindsay Buck | Kansas NEA Sherri Schwanz, Kansas NEA vice president | Over 15 years through advocacy and through leadership roles in my local and state affiliates. | Safe working environment, written in the negotiated agreement. There were several schools where educators and students were getting sick. The district didn't want to take the steps necessary to completely eradicate the problem. The association, with the support from the community, stood together to fight this problem. | Communication, educator voice, and student voice. Our working conditions are our students' learning conditions. | Parent groups | Our working conditions are our students' learning conditions. We are close to the metro area and educator turnover affects our students' learning. | I'm not sure I know the answer to this question. | Non-discrimination policy, student-led groups supported by educators. |
|--------------|--|---|---|---|---------------|--|--|---|

ESP Careers

COMMITTEE MEMBERS

Margaret Powell, *Chair*
Jackson, NC

Nelly Henjes
Clearwater, FL

Alfonso Salais
Lansing, MI

Andrea Beeman
Maple Heights, OH

Vin Levcowich
Wood River Jnct, RI

Christine Sampson-Clark
Trenton, NJ

Kenneth Dukes
Montevallo, AL

Rae Nwosu
Austin, TX

John Scanlan
Pendleton, OR

Gwendolyn Edwards
Dumfries, VA

Ellen Olsen
St. Paul, MN

Kimberly Scott-Hayden
Union, NJ

Stephanie Ervin
Spokane, WA

Matthew Powell
Mayfield, KY

HaSheen Wilson
Boardman, OH

Karl Goeke
Bloomington, IL

Mary Ann Rivera
Western Springs, IL

Staff Liaisons:
Amber Parker
Jennie Young

Charge 1

Identify and compile best strategies and practices for how districts are using Education Support Professionals to advance students' learning, in virtual spaces, through academic support, and helping to meet their social, emotional, health and other needs during the COVID crisis.

The ESP Careers Committee is pleased to present, Protecting ESP Jobs in a COVID-19 Environment and Beyond as one of two end products it helped inform the development of for Charge 1. This guidance outlines specific issues and key considerations related to securing protections for ESP jobs in a crisis environment such as COVID-19. In addition, a session entitled Bargaining and Advocacy in the Face of Crisis was offered at the 2021 NEA ESP National Conference. The workshop focused on helping members and local leaders tackle issues brought upon by a crisis such as protecting ESP careers. The guidance document was available for download as part of the session materials.

The creation of the guidance and workshop content started with the collection of best practices and strategies related to how ESPs are (or could be) advancing student learning, in virtual spaces, through academic, social, emotional, health and other supports during the COVID-19 crisis. A survey created by ESPQ staff in collaboration with ECC Chair Margaret Powell, was disseminated to committee members and through a variety of ESP networks. Almost 500 responses were received.

A variety of best strategies and practices related to supporting students academically (e.g., providing tech support to students by helping them navigate online learning platforms, providing small group and 1:1 support to students, providing Wi-Fi hot spots via school buses, holding virtual office hours for students and parents); supporting

the social, emotional, health, and other needs of students (e.g., bus divers transporting students with special needs to get services, sending notes of encouragement and inspiration to students, conducting wellness check-ins); and supporting families (e.g., food service and transportation staff providing meals to families, parent liaisons' identifying resources and providing transportation to families in need, attendance clerks answering questions from parents and helping them fill out applications and forms virtually) were received.

Committee feedback and discussion centered around how the transition to remote and hybrid learning environments had resulted in new threats to ESP job security including reductions in hours, wages, and/or benefits; new and/or expanded work assignments and responsibilities; and privatization.

The committee brainstormed and then voted on end products for Charge 1. The output that ranked the highest was professional learning opportunities (e.g., webinars, professional development, trainings, virtual forums, stakeholder workshops) for ESPs. Bargaining and Advocacy in the Face of Crisis was developed and then offered at the 2021 NEA ESP National Conference.

Given the significant discussion and concern from the committee around threats to ESP job security, they also supported the development of the guidance document as a second end product. Results from the initial survey were analyzed and incorporated into the guidance as examples of the roles ESPs can play (and are playing) to advance student learning in virtual environments. The guidance also addresses privatization and includes sample MOU, bargaining, and resolution language. The guidance can be found at the end of the report.

Charge 2

Review the nomination submissions and recommend to the Executive Committee a recipient for the 2021 ESP of the Year.

At the September 30 meeting, Jennie Young (ESPQ) reviewed the ESP of the Year (ESPTY) timeline and process noting that a new online nomination and scoring system was under development. Committee discussion centered around the importance of participation in the review and scoring process and exercising care and commitment when reviewing nominations including scoring objectively and putting implicit biases aside. Confidentiality was also stressed as critical to maintaining the integrity of the process. The importance of committee participation in the scoring process was reiterated and requirements for participation in the selection meeting and the process for conflicts of interest and recusals was reviewed.

On December 17, the committee participated in a meeting to review in detail the nomination review and scoring process (e.g., award criteria, nomination package requirements, scoring rubric and materials). The committee also received an online demonstration of the new online reviewer portal through which they reviewed and submitted scores for each nomination. Kimberly Scott-Hayden was not in attendance at this meeting (or any meetings moving forward) as she recused herself from the process as the New Jersey Education Association's state nominee. Optional question and answer sessions were also held virtually on January 7 and 14.

At the February 7 meeting, which focused on selecting the ESPTY, Margaret reviewed items of importance including confidentiality of all matters related to the process before, during, and after the selection meeting; objective scoring and implicit bias, and calculations used in the scoring process. She reinforced that no new information about any nominee could be shared and only the award criteria considered when discussing nominations. Committee members were reminded that the recommended nominee cannot be shared with anyone who did not participate in the selection meeting (including committee members not present). The

selection process took place and Kimberly Scott-Hayden was selected for recommendation to the Executive Committee (Kimberly had already recused herself from the entirety of the selection process).

A debrief on the new ESPTY nomination submission, review, and scoring process took place. Overall, the committee thought the new online system (i.e., Blackbaud) and process was an improvement. The new system served as the platform through which affiliates submitted ESPTY nominations and committee members accessed, reviewed, and scored them.

Committee members liked that the system was user-friendly, it provided a single location for accessing all of the nominations, and it gave them the option to review nominations directly from the system, or to download or print them. Having access to the nominations electronically was preferred as it didn't require the shipment of nomination materials, the handling of large amounts of paper, and it eliminated waste. In addition, the consistency of formatting across all nominations contributed to a more efficient process.

Committee members also shared areas of improvement including the design of the printable PDF and nomination interface (e.g., scrolling text box, score input field). It was suggested that it might help affiliates with their state process if the same online system was available to them.

Much of the remaining debrief focused on areas of improvement related to the award criteria and guidelines. Committee members engaged in rich discussion on how to revise nomination materials so that nominees are successful in demonstrating the positive impact their work has on students, families, the association, and the community as a whole. In other words, telling their story. Discussion on how to uplift and/or align NEA's priorities with the award criteria and process in order to affect systems change in the long term also took place. The overall need to review and revise nomination guidance to ensure that evidence requirements are met was also discussed.

Protecting ESP Jobs in a COVID-19 Environment and Beyond

Introduction

Education Support Professionals (ESPs) keep our schools running, and our students connected, safe, healthy, and fed. Now more than ever, ESPs are critical in delivering the services our students and their families need and deserve. From the beginning of the COVID-19 crisis, they have been on the front lines helping to advance student learning in virtual, in-person, and hybrid environments. ESP jobs have changed under COVID-19 and their responsibilities have expanded to include key assignments such as preparing and delivering meals, supporting students with online and in-person instruction, conducting student wellness checks, expanding access to technology and online capacity, administering health screenings, and implementing health and safety mitigation strategies.

While the job assignments for some ESPs expanded as a result of COVID-19, in many cases, the transition to remote and hybrid learning models resulted in threats to their job security including reductions in hours, wages, and/or benefits; new and/or expanded work assignments and responsibilities; and privatization. As schools transition back to full in-person instruction, we know threats to ESP job security will continue.

This document outlines specific issues and key considerations related to securing protections for ESP jobs in a crisis environment such as COVID-19. However, several of these strategies, such as protecting ESP jobs from being outsourced, or paying ESPs for working in a higher job classification, should be incorporated into your collective bargaining agreement or advocacy efforts regardless of COVID-19.

Using Collective Bargaining Rights or Meet and Confer

Since the pandemic started, many affiliates have negotiated memoranda of understandings (MOUs) to address staffing assignments, compensation, and health and safety issues among others. Even if your local has not, most collective bargaining agreements contain enforceable language covering these issues. Even where bargaining is not permitted, you can use these provisions as a framework for discussions with administrators, either as part of a labor-management committee or through meet-and-confer opportunities.

Specific Issues and Key Considerations

New or Expanded ESP Roles and Work Assignments

Changes in instructional models, student support systems, and COVID-19 mitigation strategies have resulted in new work assignments, modified work schedules, and concerns about ESP job security. ESPs should be allowed to perform available temporary or alternative assignments when their regular duties have been suspended or their hours have been reduced.

Key considerations for addressing assignments and staffing include:

- Taking into consideration employee qualifications and skills to expedite transition to temporary or alternative assignments.
- Ensuring ESPs maintain full pay and benefits if their regular work is unavailable by providing additional training for ESPs who take on temporary work to support students, classroom teachers, and specialized instructional support personnel (SISPs). This includes assembling and distributing meals, learning packets, and technology; contacting families of students who aren't participating or are frequently absent; assisting with small group instruction; troubleshooting technical issues; and conducting virtual or in-person home visit wellness checks. Additional examples can be found at the end of this report.
- Paying ESPs the higher rate of pay if they are performing jobs in a higher job classification.
- Paying ESPs who work during school closures a hazardous duty or essential worker stipend.

Sample Contract Language

- An employee may be temporarily assigned to provide services outside the employee's normal job description if work within the employee's job description is unavailable due to the temporary closure of school facilities.
- Employees shall receive appropriate professional learning and time to perform any additional roles and responsibilities. Employees who perform responsibilities in a higher job classification will receive higher pay.
- Any ESP providing teacher coverage shall be paid an additional [\$xxx] per day.
- Within the contractual workday, employees shall have self-directed planning time and team directed collaborative time to support the instructional responsibilities of their job. This shall include collaboration time between teachers, SISPs, and paraeducators.
- The parties agree that in an effort to keep all ESPs employed and engaged in meaningful work, some bargaining unit members whose work assignments are deemed unnecessary due to COVID-19 will be reassigned to work outside their normal class or classification. Employees who are reassigned will be provided the necessary and required information and training to carry out the duties and responsibilities of the assignment. The District and Union will bargain/ collaborate to discuss the repurposing and/or reassignments and the process to do so.

One approach to addressing modified ESP duties is to outline the alternative assignments in an MOU. During the COVID-19 pandemic, the Maple Heights City School District Board of Education and the Maple Organization Support Team (MOST) in Ohio negotiated the following MOU language. Although it was written as a response to 100% remote learning, this example could be modified to reflect a transition to full in-person or hybrid instruction.

Providing Maple Heights City Schools remain virtual with no students or partial students in the buildings, job descriptions for MOST bargaining unit positions shall be altered

as follows:

- a. Food Service – prepare breakfast and lunches for students. Other duties as assigned by their immediate supervisor.
- b. Secretaries – continue to do assigned duties with communication and attendance. Other duties as assigned by their immediate supervisor.
- c. Paraprofessionals and Library Media Clerks – prepare education packets, assist teachers on Google meets to provide student support, make phone calls to assist parents and students, collect and report issues to Administration through a Google DOC form. Other duties as assigned by their immediate supervisor.
- d. Security – monitor meal distribution and provide support to administrators. Other duties as assigned by their immediate supervisor.
- e. Buildings and Grounds – maintain school buildings and prepare buildings for face-to-face learning. Other duties as assigned by their immediate supervisor.
- f. Transportation (Drivers and Monitors) – maintain buses, prepare for return to in-person learning, distribute breakfasts and lunches to students, distribute and pick-up education packets and technology, wellness checks for students assigned to bus routes. Other duties as assigned by their immediate supervisor.
- g. Custodians – continue to clean and maintain buildings and make modifications for in-person learning. Other duties as assigned by their immediate supervisor.
- h. All classifications shall attend and participate in professional development to prepare for their return of students and in-person learning.

NEA has produced additional resources that provide bargaining and advocacy recommendations to address some of the [workload](#), [workday](#) and [staffing](#) issues that have impacted our members during the COVID-19 pandemic.

Privatization and Outsourcing in a Crisis

Considering the negative impact privatization has on students and the community, outsourcing ESP jobs is always bad public policy. In a crisis, such as a pandemic, the operations of private contractors exacerbate the risks of outsourcing ESP jobs, putting students and staff at more risk. More specifically:

- Privatizers use a workforce that is transitory and without commitment to a work location. By contrast, most ESPs live in the community in which they work. They know their students, their schools, and the community and want to see the school community thrive. During the pandemic, ESPs have shown up in challenging and dangerous situations specifically because of their commitment to their schools and communities. Moreover, ESPs know their buildings and how they operate, and in a crisis, this knowledge and experience is crucial.
- Private contractors often do not provide health care benefits or paid time off to employees. These employment practices put the health of students and staff and the community at large at risk especially during a pandemic. Employees need to be able to stay home if they or a family member have been exposed to COVID-19 or are experiencing any COVID-19 symptoms.
- Private contractors mandate that their employees

follow regimented work protocols with no flexibility. During the pandemic, ESPs, who know their jobs and the buildings they work in, are more likely to work together with administrators and other staff to adjust schedules, work assignments, pace, and workflow, often with little or no lead time. In a crisis, and fluid environment, flexibility is crucial.

- Private contractors are not transparent or truly accountable to the public. During a pandemic both are critical to ensuring that the proper health and safety mitigation strategies are being followed.

Use of Volunteers

Key considerations for addressing the use of volunteers include:

- School districts should not use volunteers to outsource ESP jobs.
- School districts should re-train ESPs or other educators who may not be fully employed before using volunteers, who in many cases, would also require training before being able to complete any work in the school.
- ESPs have proven that with appropriate resources and training, they can accomplish new and demanding tasks of the pandemic.

Sample Contract Language

- The District agrees it will not contract out work customarily and routinely performed by bargaining unit members, which would displace or reduce the work hours of unit members.
- The District agrees that volunteers will not displace or reduce the regular work hours of unit members.
- The Board agrees to attempt to utilize all bargaining unit members in lieu of a reduction in force, use of volunteers, or contracting out.
- A sample anti-outsourcing resolution can be found at the end of this report.

Additional Information

For additional information, contact:

Department of Collective Bargaining and Member Advocacy: collectivebargaining@nea.org

Department of Educational Support Professional Quality: espprogram@nea.org

Examples of New or Expanded ESP Roles and Work Assignments During COVID-19

Note: The following examples are for consideration only and may not be appropriate for all situations. Additionally, they are not inclusive of all expanded ESP roles and work assignments during COVID-19. The examples are organized by ESP career family; in some cases, regular job duties and assignments are listed. To learn what ESP jobs are included under each career family, click [here](#).

Clerical Service ESPs

- Process records related to school registration
- Provide information to and answer questions from families, teachers and other staff, etc., by phone and email
- Assist with budget, payroll, and procurement
- Submit applications for various waivers (e.g., USDA waivers, ESSA waivers)
- Track attendance
- Accept mail and deliveries
- Distribute books, technology devices, and other

classroom materials to students who pick these up from school

- Track students who need internet access and technology devices
- Assist technical service ESPs with monitoring the replacement of devices in need of repair
- Contact families to determine support and resource needs
- Translate information regarding supports and resources for ELL students and families (e.g., meals, technology, assignments)
- Conduct phone, virtual, or “in-home” wellness checks to check on attendance and provide supports including those related to social and emotional needs
- Participate in professional development

Custodial and Maintenance Service ESPs

- Clean, disinfect, and maintain all school and district facilities and property (e.g., school buildings, district offices, athletic facilities, transportation hubs, outdoor spaces, maintenance shops, buses and other vehicles)
- Service, maintain, and/or adjust ventilation systems
- Prepare facilities and make modifications for in-person learning (e.g., modify classroom and cafeteria layouts to ensure physical distancing; install physical barriers, such as plastic partitions; install physical guides to control the flow of student movement through hallways/stairways; maintain cleaning and disinfecting supplies; maintain supplies for hand hygiene including soap, a way to dry hands, and hand sanitizer)
- Conduct indoor and outdoor walkthroughs to identify issues or repairs needed; address and/or make building repairs as needed. Walkthrough checklists are available at <https://www.epa.gov/iaq-schools/indoor-air-quality-tools-schools-action-kit>
- Participate in professional development

Food Service ESPs

- Continue to prepare and distribute meals (e.g., in-person, grab-n-go, delivery) to students and families
- Provide guidance on healthy habits and nutrition to students, staff, and families
- Participate in professional development

Health and Student Service ESPs

- Conduct phone, virtual, or “in-home” wellness checks to check on attendance and provide supports including those related to social and emotional needs
- Connect families to community resources and supports (e.g., food, shelter, clothing)
- Provide guidance and resources on mental health and wellness for students, staff, and families
- Provide guidance on healthy habits and nutrition to students, staff, and families
- Conduct onsite scans of people entering the building to ensure health and safety mitigation strategies are being followed (e.g., temperature checks)
- Participate in professional development
- Provide professional development to staff, students and families on health-related topics
- *For additional activities and ideas visit <https://www.nasn.org/nasn/nasn-resources/practice-topics/covid19>

Paraeducators

- Participate in virtual classes and provide instructional, behavioral, and social and emotional supports to students (e.g., 1:1, small group, large group)
- Provide 1:1 instructional and behavioral support to students with special needs
- Participate in virtual classes and provide supports to teachers and SISPs (e.g., monitor and respond to questions and discussion in the chat)
- Translate work assignments, supports, and resources for ELL students and families (e.g., meals, technology)
- Create audio or visual recordings to supplement virtual learning (e.g., record read alouds and tutorials for planned activities)
- Plan and lead movement or sensory activities during breaks or record on video; develop sensory activities that can be done at home
- Assist with uploading assignments and other materials to the online platform
- Identify and compile materials that can be used to supplement lesson plans
- Compile a list of online resources on specific needs (e.g., Occupational or physical therapy, ELL) or to supplement activities (e.g., music, reading, movement) for families needing additional supports
- Provide students and families technical support (e.g., troubleshoot issues) related to virtual platforms and devices
- Assist with attendance and monitor student engagement in virtual setting
- Collect data on student progress; collect data to identify specific student needs
- Read to students over the phone or virtually through a live or recorded video (e.g., hosting online story hours)
- Hold virtual “office hours” to answer questions from students and families
- Prepare and deliver instructional packets, materials, and technology devices to students and families
- Conduct phone, virtual or “in-home” wellness checks to check on attendance and provide supports including those related to social and emotional needs
- Conduct regular check-ins or other activities that aim to meet the social and emotional needs of all students including those with special needs (e.g., send cards, gifts and notes by mail to offer words of encouragement and comfort; hold team socials or dance parties, brain breaks, virtual lunches)
- Participate in professional development

Security Service ESPs

- Assist with and/or monitor meal distribution at school or the delivery of meals via school transportation
- Monitor the distribution of technology devices at school or via school transportation
- Secure buildings and premises during periods of full virtual learning
- Participate in professional development
- Provide professional development to staff, students and families on topics related to safe schools

Skilled Trades ESPs

- Service, maintain, and/or adjust ventilation systems
- Conduct indoor and outdoor walkthroughs to identify issues or repairs needed; address and/or make

building repairs as needed. Walkthrough checklists are available at <https://www.epa.gov/iaq-schools/indoor-air-quality-tools-schools-action-kit>

- Participate in professional development, including for relicensure

Technical Service ESPs

- Provide systemic supports for online learning at the school and/or district level for students and staff
- Inventory, update, and maintain hardware (e.g., laptops, wiring/setup, devices) and software (e.g., ensure protection from viruses and hackers)
- Distribute technology devices, hot spots, software, and other supplies to students and families
- Provide technical support (e.g., troubleshoot issues) related to virtual platforms and devices to students, families and staff
- Troubleshoot mobile hot spot access issues on Wi-Fi enabled buses
- Host technology sessions and check-ins to help families and students understand virtual platforms and devices
- Participate in professional development
- Provide professional development to staff on virtual platforms and devices

Transportation Service ESPs

- Deliver meals and other resources (e.g., technology devices, internet access/hot spots, supplies)
- Drive to remote locations to provide mobile hot-spots for students
- Clean and maintain vehicles, transportation garages, etc.
- Ensure inspections are conducted on a regular basis
- Transport students to get services and supports (e.g., tutoring, health checks)
- Make phone calls to students and families for attendance and wellness checks
- Participate in professional development, including for relicensure

All ESP Career Families

- Regularly communicate with students and families for attendance and wellness checks
- Communicate with families when students are missing classes or are not turning in work assignments
- Conduct regular family outreach to determine needs and provide resources and support (e.g., pair ESPs with specific families)
- Copy USB sticks for students
- Read to students
- Help with virtual clubs and provide homework support
- Create and send supportive notes or send inspirational or fun quotes so students know they are not forgotten
- Participate in professional development
- Create and host virtual activities to ensure the social and emotional health of students by increasing one-on-one connections and encouraging conversations so students can process their emotions and feel supported and heard. Activities could include a beginning of the week virtual check-in and end of week check-out, sensory and movement break times, stretching and other desk exercises, wellness groups, and reading time.
- Create and host virtual activities to strengthen peer

student relationships. Activities could include morning meets, social snack time, lunch bunch, virtual school spirit rally, Kahoot parties, and other after-school enrichment activities.

Resolution in Support of District Education Support Professionals

Whereas the _____ School District values the contributions of our Education Support Professionals (ESPs) in the current COVID crisis and beyond; and

Whereas our Education Support Professionals are putting themselves at risk to continue essential services and programs for our students; and

Whereas our Education Support Professionals have shown remarkable adaptability and flexibility; and

Whereas our Education Support Professionals have always been committed to keeping our students healthy, safe, engaged, supported, and challenged; and

Whereas _____ School District attracts and retains the most professional bus drivers, food service employees, clerical staff, paraeducators, custodial and maintenance workers, skilled trades workers, technical services employees, nurses and health aides, and security officers; and

Whereas _____ School District supervises and manages Education Support Professionals with a focus on delivering the best services to our students: and

Whereas the Education Support Professionals of this district constitute a stable, committed, and skilled workforce of educators; and

Whereas privatization often leads to a combination of business practices that will make our school community less safe including an unstable workforce of temporary workers without a commitment to students and their families, the lack of adaptability of duties and scheduling flexibility, and a workforce more likely to come to work when they are ill because they have no access to health care or paid sick leave; and

Whereas in these challenging times we need more transparency and public accountability; and

Whereas Education Support Professionals are not only employees, but also our neighbors, and parents of students in _____ School District; and

Whereas this community and this school district should be as committed and loyal to our Education Support Professionals as they have been to our students and staff.

Now, therefore be it resolved that _____ School District will not privatize, outsource, contract out, or in any way undermine the direct employee/employer relationship with our Education Support Professionals.

Be it further resolved that the above commitments are incorporated into district policy.

Ethnic Minority Affairs

COMMITTEE MEMBERS

Gladys F. Marquez, Co-Chair
Frankfort, IL

Gina Harris
Oak Park, IL

Alberto Nodal
Castro Valley, CA

Tucker Quetone, Co-Chair
Rochester, MN

Tracy Hartman-Bradley
LaVista, NE

Lindsey Peifer
St. Paul, MN

Chelsie Acosta
Holladay, UT

Taunya Jaco
San Jose, CA

Christine Sampson-Clark, Executive Committee Liaison
Trenton, NJ

Terry Addison
Puyallup, WA

Jodi Kunimitsu
Kihei, HI

Christine Trujillo - Heeke
Henderson, CO

Charmaine Banther
Pepeekeo, HI

Cherlynn Lee
Kirtland, MN

Staff Liaisons:
Tanisha Manning
Pamela Rios
Harry Lawson, Jr.

Karen Butler-Moore
Lynwood, IL

Mary Levi
Alta Loma, CA

Elizabeth Connor, Aspiring Ed Liaison
Oklahoma

Cecily Myart-Cruz
Inglewood, CA



The Ethnic Minority Affairs Committee met on February 4th and March 14th, 2021 to work on the committee Charges. The notes from the two meetings are appended to the report.

Charge 1

Review existing Bylaw 3-1(g) state plans for promising, sustainable and measurable strategies and/or practices that support greater racial equity in inclusion and directly improve ethnic minority involvement and participation at all levels of the Association to be shared with affiliates as they work to improve their plans.

Themes

- Native People, Asian, Black, Latin(o/a/x), Middle Eastern and North African, Multiracial, and Pacific Islander people lack access to information about Bylaw 3-1(g), State Affiliate 3-1(g) plans, and engagement opportunities.
- Methods and practices of communication across the Association need to be assessed - Native People, Asian, Black, Latin(o/a/x), Middle Eastern and North African, Multiracial, and Pacific Islander people are most likely to not receive information about opportunities to engage the union and leadership opportunities in addition to information

regarding 3-1(g) plans and how they can become involved.

- Education and leveling - shared understanding of history related to Bylaw 3-1(g).
- Evaluate and assess effectiveness and impact of 3-1(g) processes and practices.
- Strategies/Practices
- Use of racial equity impact assessment to:
 - a. Assess 3-1 (g) plan review rubric using racial equity tools – impact assessment(s).
 - b. Develop SMART goals for measuring the organization's success
- Analyze the needs of members and leaders' access to information regarding Bylaw 3-1(g).
- Broad stakeholder engagement; feedback loops; consistent communication; and increasing leadership engagement for Native People, Asian, Black, Latin(o/a/x), Middle Eastern and North African, Multiracial, and Pacific Islander peoples should be included as elements of the Bylaw 3-1 (g) plan; review process and practice(s) to ensure RA delegate goals are achievable.
- Sound organizational practices include documenting and ensuring history is shared; assess opportunities to share history of equity and inclusion of Native People, Asian, Black, Latin(o/a/x), Middle Eastern and North African, Multiracial, and Pacific Islander

people including the NEA/ATA merger across the Association.

- Proven strategies include developing guidance, best practices, and resources for plan development, implementation, assessment/evaluation.

Charge 2

Identify and compile promising strategies, practices and partnerships that can be shared with and leveraged by NEA affiliates, members and staff to further advance the Association's racial justice work.

Themes

- Member Access to the organization – timing, calendaring, expanding methods of delivery.
- Ongoing practice review to ensure racial equity is centered.

Strategies/Practices

- Improve and strengthen organizational practices that support participant basic needs like childcare, interpretation, food, proximity to transit lines, or time of day to help increase participation and access.
- Partner with other labor and broad spectrum of community based partners, develop workshops and learning opportunities to improve awareness and understanding of the many identities represented and the impact of racism and other forms of oppression and exploitation on those communities.
- Regular review and assessment of staffing at all levels of the organization to ensure the organization is taking steps to correct decades of institutional racism. To account for a lack of representation within the organization staff ranks, utilize racial equity impact assessment tools and frameworks to inform hiring practices, processes, and recruitment strategies.
- Ensure the full identities of racial and ethnic people of color (sexual orientation, gender identity and expression, immigration status, ability status, age, languages spoken, etc.) are recognized, respected, and taken into consideration in the development of organizational culture; for example, produce literature, posters, and information in multiple languages – and then translate them to English.
- Periodically assess the disproportionate impact of organizational policies on Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander members to identify strategies, for example:
 - Expanding opportunities, promotion, and developing alternate practices to deliver content - investigate how to engage more members post-COVID in organizational activities.
- Broad stakeholder engagement with Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander to create a robust, expansive list of partners and resources that represent their communities.
- Establish SMART goals and benchmarks that explicitly target leadership development, recruitment, and retention of Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander members.
- Establish intentional and targeted pathways that seek the leadership of Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander people as decision-makers within the

organization.

- To continue to expand on NEA's racial justice in education work – developing strong networks throughout the Association is a critical element; strategically identifying and promoting state level committees, such as EMAC and Racial Justice committees to level set awareness while highlighting the leadership of Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander people.

Charge 3:

Review input from EMAC hearings and identify the broad themes that will help inform the implementation of NEA's Strategic Objectives.

Themes

- Regionalize conferences, learning, and education opportunities
- Multiple level mentoring programs – High School - Aspiring Ed and Aspiring Ed - Experienced Educators
- Intentional and targeted pathways and opportunities for Native People, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander people.

Strategies/Practices

- Promote and highlight the model of the state of Illinois' Ethnic Minority Emerging Leadership Training (EMELT) that has been active since 2012. It mirrors the six WMLTs that NEA used to have at a state level.
- Establish intentional and targeted pathways that seek the leadership of Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander people as decision-makers within the organization (for example, Leaders of Color Pathways Project).
- Include intentional and targeted opportunities for Aspiring Educators.
- Periodically assess the disproportionate impact of organizational policies and practices on Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander people awareness of, access to, and participation in conferences, workshops and organizational activities broadly.
- Active, intentional and resourced partnerships with HBCU, HSI, TCU and AAPISI as a recruitment and retention strategy to increase the presence and inclusion of Native, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander people in the profession.

Charge 4

Provide input, through the EMAC Co-Chairs, to the Conference on Racial and Social Justice Planning Team.

- Make sure the speaker rotation is equitable so members see themselves in the sessions and so all our issues are brought forward as well.
- Continue utilizing the arts, culture, and connection space.
- Session leaders need to:
 - Be aware of our work, organizational systems, and groups/caucuses/committees, etc.

- Have classroom experience if addressing classroom topics
- Address caucus specific issues as well as general racial/social justice
- Have equitable representation across all groups; Native People, Asian, Black, Latin(o/a/x/e), Middle Eastern and North African, Multiracial, and Pacific Islander
- Provide networking spaces.
- Provide optional film screenings.
- Provide self-care activities.
- Provide opportunities to put ideas into actions.
- Good to have the Conference before the RA
 - Like the Lounge and that it provided hands on participation
 - Maybe virtually have breakout rooms with maybe a movie, entertainment (Musician) etc.

APPENDIX A – NOTES FROM FEBRUARY 4 VIRTUAL MEETING

EMAC – FEBRUARY 4, 2021 7-9:00 PM

ABLE TO ATTEND

Maritza Avila, Charmaine Banther, Tracy Hartman Bradley, Ryan Choi, Cecily Myart Cruz, Gina Harris, Taunya Jaco, Price Jimerson, Jodi Kunimitsu, Cheryl Lynn Lee, Gladys Marquez, Karen Moore, Alberto Nodal, Elizabeth Shadid, Roman Trejo (Happy Birthday Anniversary), Christine Trujillo, Tucker Quetone, EC Liaison: Christine Sampson Clark
Staff Liaison: Harry Lawson, Jr.

MEETING AGENDA

- Welcome & Introductions
- Land acknowledgement
- Consensus model
- Review & Discuss Charges
- Overview and Prep for February & March Meetings
 1. Identify/confirm needs to prepare for February Meeting
 2. Meeting and Information Needs:
 - Hearing Reports, July 2020 and January 2021
 - Video and written reports from Centers, Departments and staff
- Contact Information Review
- Next Steps
- Adjourn

NOTES:

Link to meeting video (*We started the recording a little late*):

https://neahq-my.sharepoint.com/:v/g/personal/hlawson_nea_org/EbdzSQeXzWZOrRV--nA4Ci0BlzwH43vhQlZ--XenlVP5w?e=dEMmZd

- Gladys called meeting to order.
- Welcome and introductions

Consensus model

- Tucker Quetone provided an overview. Document outlining the consensus model can be found in the EMAC NEA360 Group Folders

Review & Discuss Charges

- Gladys Marquez read out charges and asked if charges were understood. No discussion.

Overview and Prep for February & March Meetings

Reviewed needs in preparation for future meetings and to prepare the EMAC report. The committee discussed receiving video reports from staff. The following questions and comments were generated during the discussion(s) and will be presented to the appropriate staff to generate their reports:

3-1(g)

- Accessibility of resources to members – What steps can be taken to share 3-1(g) information more widely throughout the Association? Any practice/guidance suggestions that could be made to state and local affiliates about how to do that?
- What is the process of 3-1(g) plan submission, review through approval?
- What is EMACs role in the review and approval

process of state plans?

- Can 3-1(g) data be disaggregated by regions within states? To be able to target better.
- What are the accountability measures for states not reaching the goal(s), or not even trying to reach the goal(s)? Evidenced by plans being submitted repeatedly without revision?
- How are members being engaged on 3-1(g)? What discussions/strategies are being discussed to enhance that organizational practice?
- What other questions do you all have about 3-1(g)?
- How do we build knowledge and about 3-1(g)? Not a “reflex knowledge”, but a deep understanding about the bylaw, its purpose, goals and impact.
- What steps are being taken to break down white supremacy culture with the organizations policies and structures?
- How can EMAC and BIPOC folk get in spaces to educate others? (Sessions at Leadership Summit?, other conferences)
- Ensure all current EMAC members have access to G-University

Leaders of Color Pathways Project (LOCPP) & MLT/WLT

- What are the different layers or pipelines for Leaders of color? What programs exist that target indigenous, Black and members of color?
- Clarified that the project will not continue after 2021 – we will continue to stay engaged with the cohort members and peer coaches to support, nurture and learn from their ongoing experiences to influence organizational decisions.
- Data requests: Cohort and Peer Coaches by state, region/zone/member category, gender, race, ethnicity, etc.
- MLT/WLT: EMAC used to plan

NOTE: There were comments made about EMAC planning the MLT. That may have occurred in a particular region- but prior to the changes made that put board members on all planning committees and removed rank and file members, the planning committee in the Southeast Region (when I was Regional Director) was not made up of EMAC representatives.

Training Initiatives

What other cohorts have received training? Are there new cohorts?

- White Nationalism
- Welcoming Schools

[Just and Safe Schools Partnership Funding](#) (live link)

Report on COVID relieve moneys and their use to support communities of color

- Number of grant applications received Vs. Number of grants awarded?
- Disaggregated by state affiliate, local affiliate, member(s)
- What communities are being served by the grants? Who will benefit from these grants being funded?
- Who benefits from the CAPE grants? MSIs, HBCUs, Tribal Schools – what specific communities benefit from the various grants? Who are the grants targeted to?
- Highlights of grant goals
- Any innovative and creative ideas that you all are

- seeing in the grants?
- How were the grants advertised?

Update/ Report: JBL Demands, BLM@Schools

Provide overview and report on:

- Justice for Black Lives Demands
- BLM@Schools Week of Action

Human Resources

- Hiring practices – What practices would HR highlight that could be shared with affiliates?
- Data/metrics – will inquire about the Affirmative Action Report
- Does NEA HR provide HR support to affiliates in the DEI space? Does NEA HR offer guidance to state affiliates on recruiting staff of color? If so, can that guidance be shared with EMAC to be included in our report in response to charge 2?
- Lack of representation of API & AI/AN staff within the association – what strategies is HR using to increase representation? Are there strategies that can be highlighted and shared with affiliates through the EMAC report?
- Are there wage gaps based on race and/or gender? What strategies is HR employing to close them?

CAPE Report

- CAPE Annual Report
- How many requests/awards? Locations?
- Who applied? And what did they apply for?
- Who benefits from the CAPE grants? MSIs, HBCUs, Tribal Schools – what specific communities benefit from the various grants? Who are the grants targeted to?
- Concern that there is an underrepresentation of Latinx people applying for and receiving CAPE grants – does CAPE have some ideas about how to improve those outcomes?
- Grants with successful outcomes and practices to share?
- Are there any new initiatives that CAPE is employing in the grants process?
- Is there a role for EMAC in the CAPE Grant process?
- Can CAPE create a system in which applicants can see other applications for guidance, etc? (They do something like this in CA)

Upcoming Meetings Information Needs:

- Hearing Reports, July 2020 and January 2021
- Video and written reports from Centers, Departments and staff
- Other NEA Policy related to racial equity, inclusion and diversity
- CAPE Annual Report
- Great Public Schools Grant Report

FOLLOW UP:

- Other NEA Policy related to racial equity, inclusion and diversity (ATTACHED)
- Follow up with Center for Governance to ensure all EMAC members have access to G-University
- EMAC Group on NEA 360: there is a group already set up on NEA360- we will begin moving all documents (historical and current) to the groupsite.
- For us to make sure you have access to the EMAC Groupsite on NEA360, you must have a profile. If you don't have a profile please visit: www.mynea360.org

- This groupsite is not listed, but there are some state/local EMACs and MACs also on NEA360. There is an opportunity to create another group site to engage other EMACs/MACs as well as invite them to your groupsite to begin to share info, engage, etc. We can help you set it up.
- It could also be a way to engage SOGI and WIC to collaborate as well.

NEXT MEETING:

March 14th, 3:00 pm EDT (Note: Clocks spring forward on March 14th at 2:00 am)

APPENDIX B – NOTES FROM MARCH 14 VIRTUAL MEETING

Link to meeting video: https://neahq-my.sharepoint.com/:v/g/personal/hlawson_nea_org/EZ8BsIq7tllEutT0oGnhL6QB2GFwEVs91INLyXxqwrKKQ?e=HCyQ2G

Charge 1

Review existing Bylaw 3-1(g) state plans for promising, sustainable and measurable strategies and/or practices that support greater racial equity in inclusion and directly improve ethnic minority involvement and participation at all levels of the Association to be shared with affiliates as they work to improve their plans.

- G University is difficult to navigate. There is a wealth of information, but it is not getting out to the members.
- There needs to be an organized follow up, such as workshops available to states.
- There needs to be a focus on the ATA/NEA merger and the history of 3-1(g).
- Have each EC member partner with 3 or 4 EMAC members when it comes to working on 3-1(g) plans. EMAC members should be cc'd on communications with the states who are working on plans. This would ensure that more eyes are on the plans and can flag and assist with any areas of concern.
- A member from each EMAC caucus should be present at the 3-1(g) meeting. This year EMAC was not included in the workshops or meetings.
- NEA EMAC representatives will review the 3-1(g) plans of the states with the EC.
- NEA EMAC in collaboration with Paul Birkmeier and the Center for Governance develop a rubric for state 3-1(g) plans that include the SMART goals for how leadership opportunities are created and communicated equitably.
- Rationale- For far too many years, state affiliates have been allowed to turn in the same plan without any effort to reach the Bylaw 3-1(g) goal. By developing a published rubric and set of exemplars, states will make movement towards the goal. Additionally, 3-1(g) should be used to create systemic change for how ethnic minority educators are recruited and supported in leadership roles. States should not just use 3-1(g) as a means to get RA delegates, but as a way to create systems of support and pathways for ethnic minority educators to be empowered members of our union.
- NEA Center for Governance (Paul Birkmeier) create a rewards program for states showing improvement on their 3.1(g) goal. For example - include a cash prize for raffle for one member from the state making

the greatest percentage growth or making announcements at the end of each RA Day for states moving towards the goal.

- Rationale- Creating external incentives for states to make improvement shows that NEA is committed to Bylaw 3.1(g)
- NEA EMAC in collaboration with Paul Birkmeier and the Center for Governance develop a best practices checklist for how to create state affiliate EMACs to ensure ethnic minority leaders are involved in the planning of and creation of equitable pathways for leadership and implementation of 3-1(g) plans.
 - ◊ Rationale--Creating a best practices checklist will give guidance on how state affiliates can create Ethnic Minority Affairs Committees. The importance of having a group of people with vested interest in ensuring the 3-1(g) is implemented with fidelity is vital for its success.

Charge 2

Identify and compile promising strategies, practices and partnerships that can be shared with and leveraged by NEA affiliates, members and staff to further advance the Association's racial justice work.

1. NEA needs to review staffing at all levels of the organization including pay equity to ensure the organization

is taking steps to correct decades of institutional racism. Hiring should be targeted to be proportional to the racial percentages of the public school students we serve. Currently, 78% of NEA staff are black or white.

- Rationale- NEA cannot be a partner with racial and social justice organizations without looking inward and correcting institutional racism from within. This may mean that NEA needs to be creative with their hiring process and do more outreach with partner organizations to engage underrepresented communities to apply. Additionally, NEA needs to evaluate how staff are retained, mentored, and provided growth opportunities within the organization.
- 37% Black/African American
- 41% White
- .45% American Indian/Alaska Native
- 10.4% Asian
- 6.5% Hispanic/Latino
- .022% Native Hawaiian/Other PI
- 1.13 Two/More Races
- 2.72 Not specified

Additionally, would like to do the math to break down race by classification of position (executive, management, etc.)

1. Identify CAPE staff in each affinity area to reach out to partners and share NEA beliefs.

Composition of the NEA Staff

| | C | | D | | E | | F | | G | | H | | I | | J | | K | | L | | M | | N | | O | | P | | Q | | R | | Total Male | Total Female | TOTALS |
|------------------|--------------------------------|--------|-------|--------|------------------------|--------|-----------------|--------|-------|--------|--|--------|----------------|--------|---------------|--------|------|--------|------|--------|------|--------|------|--------|------|--------|------|--------|------|--------|---|--|------------|--------------|--------|
| | American Indian/Alaskan Native | | Asian | | Black/African American | | Hispanic/Latino | | White | | Native Hawaiian/Other Pacific Islander | | Two/More Races | | Not Specified | | | | | | | | | | | | | | | | | | | | |
| | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | Male | Female | | | | | |
| 1 Executive | 0 | 0 | 0 | 2 | 6 | 9 | 2 | 1 | 13 | 12 | 0 | 0 | 0 | 0 | 0 | 0 | 21 | 24 | 45 | | | | | | | | | | | | | | | | |
| 2 Management | 0 | 0 | 1 | 1 | 4 | 10 | 3 | 1 | 8 | 7 | 0 | 0 | 1 | 0 | 2 | 2 | 19 | 21 | 40 | | | | | | | | | | | | | | | | |
| 3 Professional | 0 | 1 | 5 | 20 | 22 | 61 | 5 | 13 | 54 | 63 | 0 | 1 | 0 | 3 | 2 | 4 | 88 | 166 | 254 | | | | | | | | | | | | | | | | |
| 4 Technical | 0 | 0 | 11 | 4 | 10 | 3 | 2 | 0 | 17 | 2 | 0 | 0 | 0 | 0 | 1 | 0 | 41 | 9 | 50 | | | | | | | | | | | | | | | | |
| 5 Admin/Clerical | 0 | 1 | 0 | 0 | 9 | 29 | 0 | 0 | 1 | 2 | 0 | 0 | 0 | 1 | 0 | 1 | 10 | 34 | 44 | | | | | | | | | | | | | | | | |
| 6 Trades/Crafts | 0 | 0 | 2 | 0 | 2 | 0 | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 8 | | | | | | | | | | | | | | | | |
| TOTALS | 0 | 2 | 19 | 27 | 53 | 112 | 14 | 15 | 95 | 86 | 0 | 1 | 1 | 4 | 5 | 7 | 187 | 254 | 441 | | | | | | | | | | | | | | | | |

- Rationale- For NEA API members we have not had a representative in the CAPE department for over a year. We had a close relationship with SEARAC previously but without a staff community outreach person, our partners can take positions in opposition to NEA. For instance, SEARAC has taken a position for standardized testing this year. We believe that would not be the case if the API staff person had been in place.
2. NEA will assist affiliates in providing release time and child care for union meetings and conferences. This would include guidance in writing MOUs to include child care support for our members beyond the RA--this should include Board Meetings and all conferences.
 - Rationale - By not providing release time and child care we are limiting the participation of women and younger members of our association. This means the

association lacks the diverse voices we need for quality decision making and limits women with children to leadership roles within the organization despite the fact that the membership is comprised of a majority female population.

3. NEA, along with partners, will create cultural competencies workshops that are inclusive and available for members and NEA staff.
- Rationale-- For the API community, there is a common thread of feeling invisible within our members and not having representation in conversations about race. An Asian Cultural Competency Workshop, for example, would highlight the diverse API history in America, discuss important issues such as scapegoating, the model minority myth, the perpetual foreigner idea, institutional, structural and internalized racism, address anti-black racism within the API community, and ensure more API perspectives are

included other than East Asian--Native Hawaiian, Karen, Hmong, Middle Eastern, etc. This could be used as a resource for NEA affiliates, members and staff to further advance the Association's racial justice work. For American Indian/Alaska Native community, these feeling of invisibility also holds true. Additionally, there are many sovereign nations within the American Indian/Alaska Native community and a AI/AN Cultural Competency Workshop would broaden the scope of knowledge and the depth to the AI/AN communities' needs. For the Hispanic Caucus, highlighting the diverse communities represented including Chicano/a, Latino/a/x/e. Also, the courses would have a focus on cultural identities and indigeneity.

4. NEA should review and evaluate their Master Calendar to ensure there is a clear pathway for members to engage in this work. Clear, transparent opportunities need to be provided to create pathways to learning and leadership and help ensure members know what opportunities exist. Additionally, NEA should investigate how they can engage more members post-COVID in conferences including live streaming, sharing recordings of the meetings, or having regional meetings that allow for a hybrid of meeting live and live streaming that may be less of a fee to attend while maintaining in-person conferences.
5. NEA will have their literature, posters, and information in multiple languages. NEA will partner with state affiliates to find the languages that are most needed.
6. NEA will partner with EMAC to create a robust, expansive list of partners and resources that represent our communities. For example: for the API community: <https://www.ncapaonline.org/member-organizations/>

Charge 3

Review input from EMAC hearings and identify the broad themes that will help inform the implementation of NEA's Strategic Objectives.

1. NEA should renew the Leaders of Color Pathway Program for an additional two-year cycle and create new cohorts for 2021-22 and 2022-23.
 - Rationale- We need to grow ethnic minority leaders throughout the organization. This pilot was a great start but COVID changed the impact of the program for this year. We will not know if the program could have increased the numbers of Ethnic Minority leaders without continued funding and research. Additionally, LOCPP should include measurable goals for how they are providing leadership roles for LOCPP members.

2. NEA should hold regional Aspiring Educator conferences especially in areas where they can partner with institutions or universities that serve all marginalized groups. (such as an MSI). It would be beneficial if there was at least one conference targeting HBCU, HSI, TCU and AAPISI.

- Rationale- If we want to bring additional ethnic minority educators into the profession, then we need to reach out to them while they are still in college. These conferences would be open to Aspiring Educator members as well as any college student who was interested.

*Also...We need to have 2 aspiring educators included with the MLT on top of the 4 educators that are sent.

3. NEA should create a list of current EMACs within all state affiliates and communicate this in order to provide ethnic minority members contact information for resources.
4. NEA should hold regional conferences for Educator Rising programs to provide high school students resources and pathways to becoming educators--and partnering with Aspiring Educators to be mentors. Follow the model of the state of Illinois's Ethnic Minority Emerging Leadership Training (EMELT) that has been active since 2012. It mirrors the 6 WMLTs that NEA used to have.

Charge 4

Provide input, through the EMAC Co-Chairs, to the Conference on Racial and Social Justice Planning Team.

- Make sure the speaker rotation is equitable so members see themselves in the sessions and so all our issues are brought forward as well.
- Continue utilizing the arts, culture, and connection space.
- Session leaders need to:
 - Be aware of our work, organizational systems, and groups/caucuses/committees, etc.
 - Have classroom experience if addressing classroom topics
 - Address caucus specific issues as well as general racial/social justice
 - Have equitable representation across all groups.
- Provide networking spaces.
- Provide optional film screenings.
- Provide self-care activities
- Provide opportunities to put ideas into actions.
- June 14, 15, 16-virtual this year.
- Good to have the Conference before the RA
 - Like the Lounge and that it provided hands on participation
 - Maybe virtually have breakout rooms with maybe a movie, entertainment (Musician) etc.

Human and Civil Rights Awards

COMMITTEE MEMBERS

Jennifer Scurlock, *Chair*
Eugene, OR

Robbie Kreitz
Dublin, CA

Lindsay Peifer
St. Paul, MN

Reed Bretz
Grand Rapids, MI

Anita Lang
APO, FEA

Robert Rodriguez
Riverside, CA

Terry Burlingame
Gilmanton Iron Works, NH

Ruth Luevand
San Dimas, CA

Sobia Sheikh
Lynnwood, WA

Rudolph Burruss
State College, PA

Marcia Mackey
Rosebush, MI

Angela Stewart
Columbus, OH

Michael Harman
Salt Lake City, UT

Gladys Marquez
Frankfort, IL

Ken Tang
Temple City, CA

Tracy Hartman-Bradley
LaVista, NE

Ronald Martin
Madison, WI

Marilyn Warner
Clearwater, FL

Serena Kotch
Clarence Center, NY

Cecily Myart- Cruz
Inglewood, CA

Staff Liaisons:
Harry Lawson
Alexandria Richardson
Shannon Nephew

Introduction

Due to the enduring coronavirus pandemic, the Human and Civil Rights Awards Committee hosted all virtual meetings throughout the fiscal-program year to plan for the 2021 Human and Civil Rights Awards in accordance with their charges. The committee met virtually on October 3rd 2020; January 9th, 2021 and on February 20th 2021.

At the onset of the year, the committee chair laid out a vision for committee affairs and engagement that would focus on intentional inclusion of all stakeholders in the awards process and that would be anchored in the historical legacy of the HCR Awards and its impact on our current environment.

Charge 1

Review the criteria, process and forms for nomination of candidates for all Human and Civil Rights Awards, and make changes as needed. Review the nomination submissions and recommend to the Executive Committee recipients for the 2021 Human and Civil Rights Awards.

Prior to their fall meeting (October 3rd), the committee was asked to review the HCR Awards informational brochure, awards category criteria, and nomination form for recommended changes and edits. Committee members reviewed all materials and shared only minor edits to the nomination forms and criteria language. During the meeting, once Ambassador assignments and roles were determined across the award categories, Award Ambassadors were asked to review and become acquainted with their awards criteria for nomination solicitation.

The committee engaged in immersive conversation around generating nominations for the 2021 HCR Awards in a virtual environment and beyond. Some of those

ideas included: Creating a video of the HCR Awards Committee and include living iconic figures of the NEA/ATA Merger; sending the NEA –ATA merger video in a series to be shared with stat presidents and state executives to educate NEA members on the NEA-ATA history; having HCR Awards Ambassadors present at the NEA state presidents meeting; bringing ATA elders together at the HCR Awards to create a video highlighting the importance of the Awards and its origins; creating a video presentation of the Awards categories themselves and their criteria; requesting that the NEA Executive Committee members share information to each cluster of state presidents that they work with; and other ideas. The committee and staff look forward to continuing to implement these ideas in plans going forward.

Aligned with these recommendations, committee members Serena Kotch and Marcia Mackey presented at the October 2020 NEA state presidents meeting on the HCR Awards nomination process and specifically emphasized the Rosena J. Willis (State Affiliate) Award for consideration to that group. Finally, and also aligned with the committee's recommendations for promotion of the Awards, HCR staff Alexandria Richardson brought greetings to the Women's Issues Committee November 2020 meeting to uplift the Mary Hatwood Futrell Award.

During their January meeting, members of the committee were briefed on the process of accessing, reading, scoring, and selecting Human and Civil Rights Award nominees for the NEA Executive Committee's consideration and approval. They were instructed on the use of the newly revamped EdCommunities site where all nominations and nomination materials were uploaded for 24/7 access and organized into folders. During the meeting, committee members were able to view and access the EdCommunities site and all nomination materials.

During and before their meeting on February 20th, the committee reviewed 27 applications for the 2021 NEA Human and Civil Rights Awards, deliberated over them, and chose 11 recipients to be recommended to the NEA Executive Committee as Award winners, including one recipient for the NEA President's Award.

Review the criteria, process and forms for nomination of candidates for all Human and Civil Rights Awards, and make changes as needed. Review the nomination submissions and recommend to the Executive Committee recipients for the 2021 Human and Civil Rights Awards.

The NEA Executive Committee approved the 11 recommendations submitted by the committee for the 2021 Human and Civil Rights Awards. Names of this year's award winners will be available for view on a dedicated public website that will host the virtual Human and Civil Rights Awards ceremony and winner profiles will also be viewable on www.nea.org/hcrawards.

Charge 2

Assist in the planning and execution of the Human and Civil Rights Awards Ceremony.

Acknowledging the current times and the overlapping challenges of a public health pandemic, reemerging racial justice movement, and economic recession, the committee, under the direction of the chair, analyzed the historical significance of the HCR Awards program throughout the Civil Rights Movement and other moments of structural change/difficulty within the Association. Prior to their October 3rd meeting, committee members were given a homework assignment to watch the NEA-ATA merger video "Honoring Our Legacy of Inclusion" and during the meeting discussed parallels between the origins of the HCR Awards in the American Teachers Association (ATA), and how the legacy of the program impacts and advances our current organizational and social environment. In relation to the video, the committee also discussed how the Awards advances strategic organizational objectives towards workers' rights, human and civil rights, and racial and social justice. This pre-work assignment and discussion set the framework and provided context for later planning for the 2021 HCR Awards.

During its February meeting, the committee selected the theme for the 2021 NEA HCR Awards: "Out of struggle, comes progress: Grounded in our history; igniting our future" and organized small planning groups to engage one another around core elements of the upcoming virtual ceremony. Under the veil of a virtual environment, the committee planning groups discussed and proposed plans for: 1) the Awardee experience and Awardee engagement; 2) key outreach and invitations; 3) past awardee engagement (Charge 3) and 4) virtual ceremony event details and NEA member engagement. Guided by the chosen 2021 theme, the committee held a discussion about what were to be the key takeaways from the virtual ceremony this year and how they wanted both the awardees and invited guests to feel after the virtual ceremony experience.

The committee is driven and dedicated to making even the virtual experience one to remember and deeply impacted for all those who attend.

The committee plans to host a Meet & Greet with Awardees prior to the virtual ceremony. The 2021 virtual Human and Civil Rights Awards is scheduled to be held on the evening of June 29th 2021.

In their October meeting, the committee deliberated and discussed their planning and contributions toward the first virtual awards ceremony in July 2020. The committee reflected on that experience as a basis for planning ahead, should there have been a need to host a virtual 2021 ceremony (at the time of their October 2020 meeting this was uncertain).

In April, the committee met to discuss possible rotation of awards and sent a memo to the NEA president with recommendations.

Charge 4

Make recommendations for collaboration with HCR award winners to advance outreach to communities and partners in support of NEA's Strategic Objective within that year.

During their fall meeting (October), the committee received remarks from Rocio Inclan, Senior Director of the NEA Center for Social Justice and Strategic Objective lead for Advancing Racial Justice in Education. Her presentation focused on the impact of the committee's work in advancing racial and social justice throughout the organization by demonstrating some of the intentional collaboration between award winners and NEA program, as well as intentional touchpoints and impacts the committee's work has had towards advancing racial and social justice broadly. Rocio brought greetings and presented to the committee on how past HCR Award winners are being strategically connected to and helping to advance our racial and social justice programmatic work throughout the organization. Throughout her presentation, Rocio provided examples of how and where HCR Award winners have been called upon as subject matter experts and/or key voices in racial and social justice and remain connected to the organization. From the Center for Social Justice Racial and Social Justice Virtual Series (April – July 2020) to the NEA Board Observances (Sept 2020), HCR Awards winners have been called upon by the organization as well as with our human and civil rights partners to advance the Strategic Priorities and Objectives of the Association. In the broader context, the committee highlighted that previous award winners Stacey Abrams (GA) and Voces de la Frontera (WI- Milwaukee) were engaged and influential around the 2020 elections and issuing a democratic win.

NEA staff continue to refer back to and work on implementing the previous suggestions of the committee to incorporate previous award winners into NEA program; including inviting recipients back to NEA events, meetings, observances and priority work.

Legislation

COMMITTEE MEMBERS

Shannon McCann, *Chair*
Seattle, WA

Rebecca Gamboa
Naperville, IL

Andy Slaughter
St. Charles, MO

Nick Archuleta
Bismarck, ND

Mike Glabere
Milwaukee, WI

Tammy Smith
Fairbanks, AK

Amy Biancheri
Batavia, IL

Ryan Hoyt
Waltham, MA

Glen Southergill
Butte, MT

Kevin Deely
Easton, PA

Deb McCarthy
Hull, MA

Christopher Stevens
Tupelo, MS

Rachella Dravis
Denmark, IA

Jo McKim
Louisville, KY

Stephanie Towles
Reading, PA

Theresa Dudley
Hyattsville, MD

Shawna Mott-Wright
Tulsa, OK

Staff Liaisons:
Marc Egan
Kimberly Johnson
Trinca Joye Mercer Barksdale

William Farmer
Chicago, IL

Ami Prichard
Littleton, CO

Introduction

Charge 1

Review the NEA Legislative Program and gather feedback from NEA members and leaders. Provide recommended modifications to the NEA Legislative Program to the Board of Directors and present for approval to the annual Representative Assembly.

Committee discussion:

See Charge 4.

Charge 2

Conduct an open hearing to review the proposed NEA Legislative Program and discuss relevant legislative issues with delegates. Work with staff to review legislative amendment submissions and determine the Committee's recommendation for each submitted amendment.

Action on the Legislative Program was postponed in 2020. However, in a virtual information session on July 7, 2020 that included more than one thousand delegates to the 2020 RA, the Legislative Committee gave an overview of the committee's responsibilities and the Legislative Program, emphasizing that the program remains in force and is vital to NEA's advocacy for students, members, and public education. The committee also explained the process of amending the Legislative Program and how to submit proposed amendments online.

During the hearing, the committee discussed how the pandemic underscored the huge inequities in educational opportunity that have always existed, and how NEA's mission in Congress was not only to lobby for legislation to address the pandemic, but to advocate for a "new

beginning" post-pandemic that would provide all students with access to a high-quality education. The committee also discussed the brutal police murders of George Floyd and Breonna Taylor. NEA's officers asked that the committee review existing language in the Legislative Program on policing in Black, Brown, and Indigenous communities and propose language to address this issue in tandem with the document NEA Demands: Justice for Black Lives.

Delegates' questions focused mostly on legislation regarding policing, such as the George Floyd Justice in Policing Act, COVID-related legislation, and safe reopening of schools in light of the pandemic. There were also questions about NEA's efforts to counter voter suppression, loan forgiveness for educators, and how, in general, NEA members would be involved in lobbying members of Congress during the pandemic.

The Pre-Summit webinar on March 3, 2021 offered the Legislative Committee a similar opportunity to interact with and hear from NEA members and explain the process for proposing legislative amendments online. Following the webinar, three proposed amendments were submitted online:

- NEA supports using the Consumer Price Index (CPI) to determine the Social Security Cost of Living Increase.
- NEA supports programs to prioritize American history, civics, and government education in our nation's schools, preserving the health of our constitutional democracy.
- NEA supports reintroducing the Native American Voting Rights Act of 2019, allowing anyone living on Native Lands and eligible to vote to both register to vote and to have full voting rights in all elections, and removing barriers and improving access to voting.

Charge 3

Review the NEA Legislative Program for items to recommend for inclusion in affiliate legislative programs and advocacy efforts at the state and local level and develop a process for dissemination to affiliates.

The committee did not focus on Charge 3 in 2020-21. However, if delegates to the RA approve proposed amendments to reflect NEA’s Justice for Black Lives demands, there are likely to be opportunities to work with affiliates, where there is interest, to include similar language in affiliate legislative programs and state and local efforts.

Charge 4

Review and make recommendations for language in the NEA Justice for Black Lives document.

During the July 7, 2020 virtual information session and pre-Summit webinar on March 3, 2021, the Legislative Committee explained that it had been asked by NEA’s officers to review existing language in the Legislative Program on policing in Black, Brown, and Indigenous communities and to propose language to address this issue.

Beginning in September 2020, the committee met five times to discuss Justice for Black Lives (JBL) and possible amendments. The committee wrestled with questions such as: What is the history of law enforcement’s presence in schools, and is there an “appropriate” presence? Should this presence be determined at the federal, state, or local level? How are students helped or harmed by the presence of police? What is the role of SROs, and how do they differ—in terms of scope of duties and training—from police in schools? How, in general, is law enforcement of any kind utilized in schools? What are the data on how Black, Brown, and Indigenous students are treated by law enforcement, as compared to White students? These discussions were greatly informed by the NEA Center for Social Justice and Officer of General Counsel, as well as the [Advancement Project](#).

Committee members expressed a wide range of views on JBL and how to include it in the Legislative Program, reflecting their broad diversity; some members teach and live in urban areas, while others are in more rural and sparsely populated areas. There are regional, ethnic, and racial differences as well. Most committee members are in K-12 settings, but some are on college campuses, where police are often experienced differently than they are in K-12 schools. This diversity presented a challenge and an opportunity for the committee: to acknowledge, discuss, and respect the divides that reflect where our own membership is on JBL; to bridge those divides where possible; and to create language that advanced NEA’s social justice aims that also unified committee members and was not so prescriptive that minimized the importance of local voice.

On February 12, 2021, Committee Chair Shannon McCann presented the committee’s recommendations to the NEA Board of Directors. Feedback during the entirety of the Board meeting led to the committee’s “listening session” the following week to hear additional voices on JBL. One outcome of this session was general agreement that JBL language should also be reflected in NEA Policy Statements and Resolutions.

Charge 5

Reassess and continue to execute a plan to increase participation in Capitol Hill lobbying and back-home lobbying visits by NEA Board Directors.

The committee piloted a phone app designed for NEA Board members in February 2020 to compile and submit information from Lobby Day visits on Capitol Hill. During this “soft” roll-out, only Legislative Committee members used the app in order to isolate any potential problems. Feedback to the designer led to some changes to improve the experience of Board members in using the app, including the creation of a confirmation message after they have filed feedback from Hill visits. The designer is also creating a brief training video in preparation for a broader roll-out when we return to in-person Lobby Days.

| Committee Recommendations | Board of Directors Action |
|---|---------------------------|
| <i>Charge 1: Review the NEA Legislative Program and gather feedback from NEA members and leaders. Provide recommended modifications to the NEA Legislative Program to the Board of Directors and present for approval to the annual Representative Assembly.</i> | |
| 1. The Legislative Committee recommends that the NEA Board of Directors propose the revised Legislative Program for the 117th Congress to delegates to the 2021 NEA Representative Assembly. (The committee is meeting <i>after</i> this report’s due date and may propose additional amendments to the Board.) | Adopt |

ADDENDUM TO LEGISLATIVE COMMITTEE REPORT

[ACLU Cops and No Counselors \(2019\)](#)

- 1.7 million students are in schools with police but no counselors.
- 3 million students are in schools with police but no nurses.
- 6 million students are in schools with police but no school psychologists.
- 10 million students are in schools with police but no social workers.
- 4 million students are in schools with police but no counselor, nurse, psychologist, or social worker.

[The Advancement Project's We Came To Learn: A Call to Action For Police-Free Schools \(2018\)](#)

- Catalogue of assaults on students by law enforcement at school
- Powerful timeline of police in schools and case studies pushing back against police presence
- In 2010, Chicago spent \$50million on school-based security guards, in addition to police
- BIPOC students and LGBTQIA+ students disproportionately impacted

[US Department of Education Office for Civil Rights: A First Look: Key Data Highlights on Equity and Opportunity Gaps in Our Nation's Public Schools](#) 2013-2014 Civil Rights Data Collection (published June, 2016)

- 24% of elementary schools and 42% of high schools have sworn law enforcement officers
- 51% of high schools with high Black and Latino student enrollment have sworn law enforcement officers
- Black students are 3 times more likely to attend a school with more security staff than mental health personnel
- Students who are in justice facilities receive less instruction than their peers

[The Sentencing Project: The Facts about Dangers of Added Police in Schools](#)

- Longitudinal research show placing armed police in schools actually increases physical dangers to youth
- Students who attend schools with on-site law

enforcement are in greater danger of unnecessary involvement in the juvenile justice system through the criminalization of behaviors traditionally resolved through standard school discipline policies

[Prison Policy Initiative: Visualizing the racial disparities in mass incarceration \(2020\)](#)

- USA incarcerates more people than any other nation
- Black youth arrested far out of proportion of all youth
- Racial inequality evident in every stage of the criminal justice system
- Key statistics in visual representation of racial disparities for youth and adults
- Also "[Following the Money of Mass Incarceration](#)" to see who benefits and who pays

[Handcuffs on Success: The Extreme School Discipline Crisis in Mississippi \(2013\)](#)

- Documents children's adolescent, non-violent behavior being criminalized
- Most common reason children were arrested was "disorderly conduct"

[Number of People Shot to death from 2017-2020, by race \(released August 2020\)](#)

- On average, over 3 people are shot and killed per day in the United States (1004 in 2019)
- The rate of Black people killed by police is higher than any ethnicity

[The Sentencing Project's Fact Sheet: Trends in US Corrections \(2020\)](#)

- \$60.9 Billion dollars spent on corrections
- 2.2 million people currently in the nations prisons and jails (500% increase since 1960)
- 6.6 million people in jail/prison, parole or probation (3.7 million)
- More than 60% pf people in prison are people of color
- For Black men in their thirties, approx. 1 in 12 is in prison or jail on any given day
- Youth who enter the system are more likely to be people of color and subjected to harsher terms of punishment

Local President Release Time

COMMITTEE MEMBERS

Hilda Kendrick-Appiah, *Chair*
Jeffersonville, IN

Robert LaMorte
Hasbrouch Heights, NJ

Kim Richards
Novelty, OH

Dirk Andrews
Casper, WY

Charles Larson
Portland, OR

Karen Ridley
Anaheim, CA

Robert Becker
La Palma, CA

Dwayne Marshall
Columbus, OH

Robert Rodriguez
Riverside, CA

Scott Ellingson
Hudson, WI

Thomas McMahon
Mahopac, NY

Barb Schram
Lansing, MI

Jon Fieldbrandt
Warren, MI

Pete Moran
Easton, PA

Julius Thomas
Valley Village, CA

Gina Harris
Oak Park, IL

Turquoise Parker
Durham, NC

Staff Liaisons:
Mark J. Simons
May Montgomery-Robinson
Linda Manny

Lisa Jennings
Sioux Falls, SD

Betsy Preval
Medford, MA

Charges

1. Select recipients of Local President Release Time Program (LPRTP) grants, monitor progress of projects, and review evaluations of selected locals.
2. Review and make recommendations as needed related to the LPRTP guidelines and budget.
3. Review and report on the LPRTP's annual training to ensure that the training aligns with NEA's Leadership Competencies, addresses Racial and Social Justice and provides recipients with the tools necessary to accomplish program objectives and advance a culture of organizing within the local.
4. Review the 2019-20 survey results on release time and make recommendations on implementation of best practices identified.

Charge 1

Select recipients of Local President Release Time Program (LPRTP) grants, monitor progress of projects, and review evaluations of selected locals.

Committee discussion:

The committee did not focus on Charge 3 in 2020-21. However, if delegates to the RA approve proposed amendments to reflect NEA's Justice for Black Lives demands, there are likely to be opportunities to work with affiliates, where there is interest, to include similar language in affiliate legislative programs and state and local efforts.

Zone 1:

Calvert Association of Educational Support, MD (\$25,000)
Vineland Education Association, NJ (\$25,000)
Avon Education Association, CT (\$12,500)

Zone 2:

Little Rock Education Association, AR (\$25,000)

Zone 3:

Winona Education Association, MN (\$12,500)
Hamilton Southeastern Education Association, IN (\$25,000)

Zone 4:

Kent Association of Paraeducators, WA (\$12,500)
Bellingham Association of School Employees, WA (\$12,500)
California Virtual Educators United, CA (\$12,500)

Charge 2

Review and make recommendations as needed related to the LPRTP guidelines and budget.

Committee Discussion:

The committee discussed changes to the grant application. The committee recommends changes to provide better clarity on membership potential retention and engagement. The committee made the following recommendation:

- The committee would like to make adjustments to the membership question in the grant application and will discuss at a future meeting.
- The committee would like to continue all of the grant recipients for another term in funding.

Charge 3

Review and report on the LPRTP's annual training to ensure that the training aligns with NEA's Leadership Competencies, addresses Racial and Social Justice and provides recipients with the tools necessary to accomplish program objectives and advance a culture of organizing within the local.

Committee Discussion:

A subcommittee met to review past training goals and

objectives and offer suggestions for 2020-21. Individual conversations we held with first year grant recipients both presidents and staff. Six 2 hour virtual sessions were held:

- October – Community Building
 - November – Leadership Competencies
 - January – Organizing
 - February – Racial and Social Justice
 - March – Leadership Competencies
 - April – NEA resources, facilitation skills, and celebration
- Second and third year grantees were invited to sessions held in 2021.

Charge 4

Review the 2019-20 survey results on release time and make recommendations on implementation of best practices identified.

Committee Discussion:

The Committee reviewed the survey results (which are attached to this document), and agrees with the recommendations from the survey.

| Committee Recommendations | Board of Directors Action |
|--|---------------------------|
| <i>Charge 2: Review and make recommendations as needed related to the LPRTP guidelines and budget.</i> | |
| 1. The committee recommends making adjustments to the membership question in the grant application. | Adopt |
| 2. That funding for <u>all</u> of the grant recipients continue for another term. | Adopt |
| <i>Charge 4: Review the 2019-20 survey results on release time and make recommendations on implementation of best practices identified.</i> | |
| 3. That the NEA Local Presidents Release Time Program Committee reflect on the existing NEA release time grant program and review criteria for eligibility to ensure local affiliates have a sustainability plan that is not vulnerable to political attacks | Adopt |
| 4. That the NEA Local Presidents Release Time Program Committee consider requiring that participants in the release time program write and implement 12-month membership growth plans in order to support sustainability of the program, | Adopt |
| 5. That the NEA Center for Organizing review existing curriculum for its local presidents training to address sustainability planning for release time programs. | Adopt |

NBI 160: Release Time Survey Report

At the 2019 Representative Assembly delegates referred NBI 160 to the NEA Executive Committee which approved the following implementation language - *“Using existing staff and resources, the NEA will conduct a survey of state affiliate presidents to determine the leave and benefit status of their local and state full-time release presidents. The results of this survey will be shared with state presidents and NEA Directors.”*

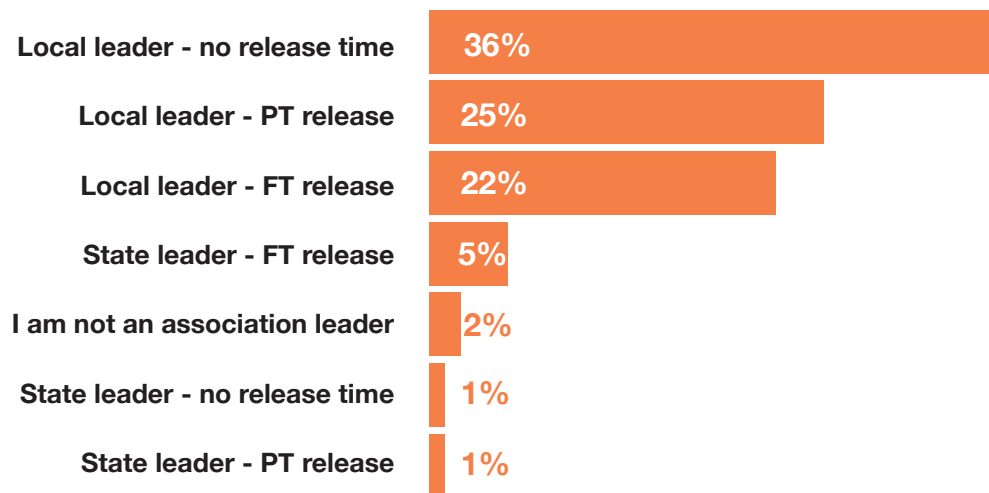
NEA prepared a survey that was sent via email to state affiliate presidents and all local affiliates with more than 200 members for whom we have an up-to-date email address. The survey was also sent to State Executive Directors and UniServ Managers to ask for their assistance in distributing to locals with release time presidents. Data was collected from February 17 through March 4, 2020. A total of 2,774 emails were sent, with a 10% completion rate goal (>300). The goal was exceeded with 784 anonymous complete responses - a 28 percent response rate.

Responses were received from 50 state affiliates. The states most represented in the responses were: California (14%), New Jersey (9%), Illinois (7%), Pennsylvania (7%), Washington (6%), and Massachusetts (6%).

Nearly three-quarters (72%) of respondents were Caucasian or white, 5 percent were black or African American, 5 percent were of Hispanic, Latino/a, or Spanish origin, 3 percent were American Indian or Alaska Native, 1 percent were Asian or Asian American, 1 percent were Native Hawaiian or Other Pacific Islander, and 1 percent were some other race, ethnicity, or origin. Over half (60%) of respondents were female, and 39 percent were male. Respondents include both local and state release time presidents:

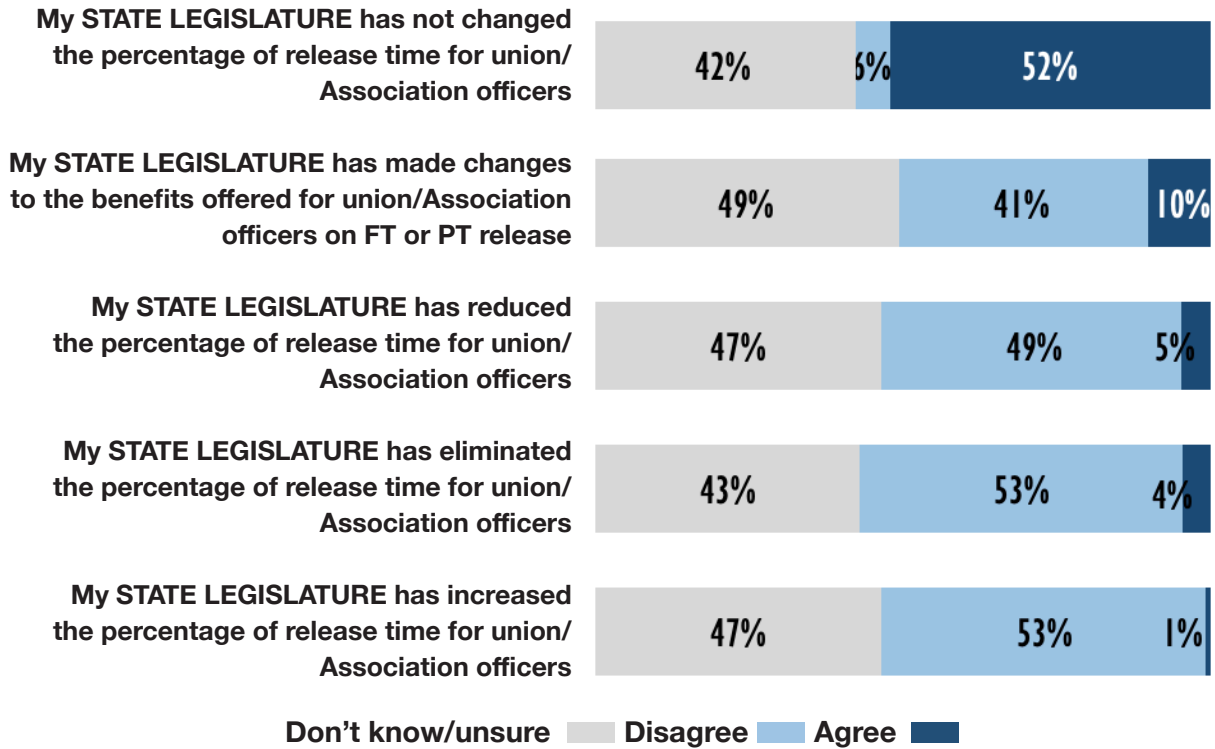
Over half (60%) of respondents were female, and 39 percent were male.

Respondents include both local and state release time presidents:

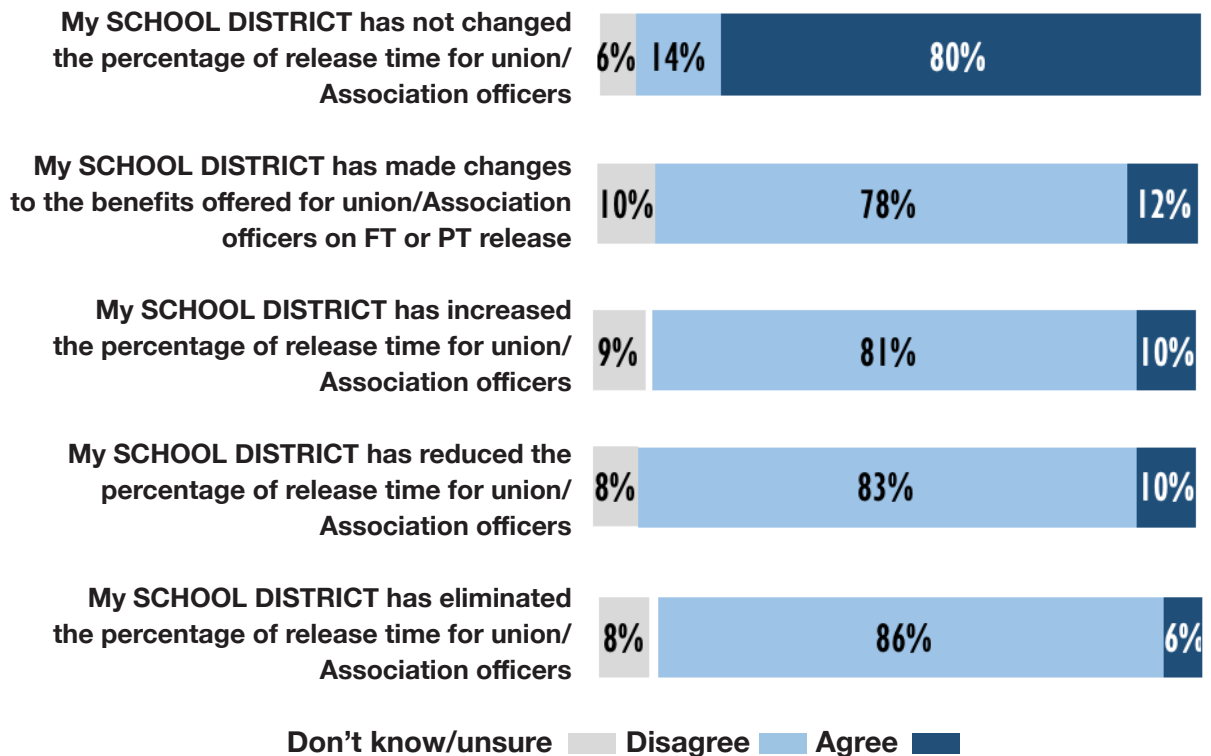


KEY FINDINGS

- Nine percent (9%) report that their state legislature has reduced or eliminated the percentage of release time for union officers, while ten percent (10%) reported changes in benefits.



- Ten percent (10%) of respondents agree that their school district has reduced the percentage of release time for union officers.



3. The majority (88%) of respondents continue to accrue experience for placement on the salary schedule while working in their current position.
4. The majority (93%) of respondents continue to accrue seniority at the same rate while working in their current position.
5. A majority of respondents reported that there was no change to their health insurance (94%), hospitalization benefits (94%), dental benefits (93%), pension plan (91%), pension service credit (91%), life insurance (91%), short-term disability (87%), and long-term disability (87%) when they assumed their current position.
6. Respondents reported a wide range of release time program designs; in terms of benefits, seniority, movement on the salary schedule, and who pays for what (the local or the employer).

NEA Recommendations to Support Union Release Time

Based on the review of the survey results and comments; it appears that while most release time arrangements continue undisturbed, there are situations where our opponents are pushing back to limit or eliminate such arrangements. It is also clear that many affiliates would currently be unable to maintain release time officers were they to face a sudden loss of employer funded support. Therefore, NEA recommends:

6. That the NEA Local Presidents Release Time Program Committee reflect on the existing NEA release time grant program and review criteria for eligibility to ensure local affiliates have a sustainability plan that is not vulnerable to political attacks,
7. That the NEA Local Presidents Release Time Program Committee consider requiring that participants in the release time program write and implement 12-month membership growth plans in order to support sustainability of the program, and
8. That the NEA Center for Organizing review existing curriculum for its local presidents training to address sustainability planning for release time programs.

State Affiliate Recommendations to Support Union Release Time

In order to continue to support release time capacity at the state and local level, NEA recommends the following best practices to state affiliates:

Internal Data Management & Research

- a. Maintain database of locals with current release time and benefits
- b. Track opposition efforts to erode benefits, monitor trends to anticipate legislative/legal attacks
- c. Assess pros and cons of all release time models for affiliates
- d. Identify positive and negative practices around release time to anticipate additional changes
- e. Understand IRS and retirement contributions to ensure continuity of benefits

- f. Put guidance out on reimbursed association days and leave

State Legislative Opportunities

- g. Where possible, define categories of allowable costs paid for by the employer
- h. Oppose taxpayer “gift of release time” bills and other anti-union efforts
- i. Partner with other public employee unions
- j. Seek equity with school board and administration benefits for release time officers
- k. Ensure that release time for all membership categories is possible

Release Time Officer Education Programs

- l. Offer workshops on understanding contract/policy compliance requirements and vulnerabilities
- m. Recommend best practices on how track and report release time
- n. Assist locals in preparing to negotiate for release time within the scope of the law

.....

“Without release time, it becomes difficult to do the things that cause membership to stay active, much less increase.”

.....

“NEA grant started our release time and was very helpful. We now accumulate enough dues to pay for the president’s part-time release.”

.....

“We assumed costs 20 years ago. If my successor is lower on the scale/on spouse benefits, we can maintain release. A candidate with my salary/ benefits is questionable without a dues increase. Note: our local has about 80% membership, we have never been a fair-share local.”

.....

“Release time is necessary to help maintain membership needs! Being available to answer questions and help staff through concerns has actually saved our District money and issues.”

.....

“Our local association cannot afford release time. We had a part-time grant from NEA a few years back. Our local would have to up membership considerably to cover the cost or funding would have to come from NEA or the state.”

.....

Internal Data Management & Research

- a. Maintain database of locals with current release time and benefits
- b. Track opposition efforts to erode benefits, monitor trends to anticipate legislative/legal attacks
- c. Assess pros and cons of all release time models for affiliates
- d. Identify positive and negative practices around release time to anticipate additional changes
- e. Understand IRS and retirement contributions to ensure continuity of benefits
- f. Put guidance out on reimbursed association days and leave

State Legislative Opportunities

- g. Where possible, define categories of allowable costs paid for by the employer
- h. Oppose taxpayer “gift of release time” bills and other anti-union efforts
- i. Partner with other public employee unions
- j. Seek equity with school board and administration benefits for release time officers
- k. Ensure that release time for all membership categories is possible

Release Time Officer Education Programs

- l. Offer workshops on understanding contract/policy compliance requirements and vulnerabilities
- m. Recommend best practices on how track and report release time
- n. Assist locals in preparing to negotiate for release time within the scope of the law

Bargaining Best Practices

- o. Bargain release time from employment duties on a full-, part-time or occasional basis for leaders (Such as local presidents, bargaining team members, and building reps to negotiate and enforce the CBA and perform other labor-management and Association functions)
- p. Agreements should, to the fullest extent allowed, provide release time without loss of pay, benefits, or seniority
- q. Assess whether the affiliate is better off fully reimbursing the employer for total compensation costs, or negotiating for those costs to be covered by the employer
- r. Strong language can either establish leave for designated local officers or a Union Leave Bank with

- which the union can provide release time for any building rep or active member on an as-needed basis
- s. Bargain existing release time MOUs/MOAs into the CBA
- t. Grieve districts who are out of compliance with bargained release time agreements
- u. If affiliate has long term release time goals, start with negotiating defined amounts of time for union business
- v. Anticipate districts trying to change practices around release time that have not been negotiated when there is a change of officers
- w. Advocate for equity in release time with ESP leaders as with certified leaders
- x. Define as many details on release time processes in the contract as needed

Member Organizing & Empowerment

- y. Write and implement a membership organizing plan to grow and maintain membership numbers
- z. Internal communications on the value of having a full-time release officer working for educators
- aa. Organize a strong and engaged membership in order to win/increase release time
- ab. Where release time is reimbursed by the local to the district, ensure members know the officers are independent and working for them

.....

“As members have decreased so has the percentage of my release time. Benefits have changed. The district no longer pays for full family benefits because they ‘can’t afford it.’”

.....

“Advocacy/support have been a major part of our responsibilities. Membership would dramatically increase if more associations had a full or partial release president.”

.....

“I went from 50% to 40% release because the cost to our membership is too expensive. Our local has to pay the actual % of release time costs.”

.....

Membership Organizing

COMMITTEE MEMBERS

Nick Sirek, Chair
Eau Claire, WI

Mike Beranek
Des Moines, IA

Sarah Borgman
Wakarusa, IN

Adrienne Bowden
Pickerington, OH

Eric Brown
Chicago, IL

James Frazier
Union, NJ

Katy Gale
Stanford, CT

Amber Gould
Glendale, AZ

Dan Greenberg
Sylvania, OH

Paula Herbart
Lansing, MI

Peggy Hoy
Twin Falls, ID

Julia Hyndman
Fort Wayne, IN

Tom Klaameyer
Juneau, AK

Dana Livermont
Sioux Falls, SD

Mollie Mumau
Erie, PA

Mary Parr Sanchez
Santa Fe, NM

Saul Ramos
Worcester, MA

Erika Strauss Chavarria
Columbia, MD

Joe Thomas
Phoenix, AZ

Alexandria Toay
Elmhurst, IL

Randall Woodard
Springfield, TN

Staff Liaisons:
Nathan Allen
Matthew Bennet
Peter Witzler

The Committee on Membership Organizing submits the following report and recommendations pursuant to our charges:

Charge 1

Review the current policies and practices to track potential members across the NEA and its affiliates.

- Identify model policies and best practices, develop a policy to submit these lists during the annual membership roll reconciliation, and move a standard national prospect policy.
- Review the current policies on the submission of local dues annually to NEA during the membership role reconciliation policy. Recommend internal systems and procedures that can expedite this submission.

Charge 2:

Review the current policies to track local leaders across the NEA enterprise. Identify opportunities to track local presidents, worksite leaders, activists, building reps, etc. and build systems to ensure NEA's ability to successfully communicate with local leaders.

In developing recommendations, the committee considered the following guiding principles:

- Imagine a union where member organizing and mobilization is easier, recruitment is quick and seamless, and retention is automated into existing systems. Imagine an NEA in which:
 - State affiliates can quickly move onto a secure Join Now link.
 - Signing up new members is easier and can be done on a mobile device.
 - After joining any webinar, a potential member's name and contact information is

- automatically sent to the local leadership for follow-up recruitment.
- Any member who contacts the state affiliate to drop their membership gets a "save" 1:1 conversation from their local president.
- In times of crisis, every local member or potential member can be mobilized in minutes
- to protect our public schools and our students' futures.
- Creating, strengthening, and maintaining member and potential member lists is critical to maintaining our strength; especially in a virtual environment.
- Moving state affiliates and individual locals onto the NEA360 system is paramount.
- There is a financial cost to inaccurate members and potential members lists to local/state associations:
 - Not having accurate and up to date lists of members and potential members has a negative financial impact on NEA and our affiliates. For example, unreconciled membership rosters can lead to inaccurate dues assessments and not having accurate potential member lists translates to lost dues.

The committee believes the ideas and recommendations addressed in this report are areas of focus needed to strengthen and grow the association. The committee recognizes that state and local affiliates have unique conditions and that affiliates will need to account for local/state conditions.

Proposed Model List Acquisition Process:

The committee heard from two state affiliates, ISEA and MTA, who have developed robust list acquisition

programs. These presentations led to deeper discussion among committee members to create a “Model List Acquisition” process that could be implemented by State Associations.

- Locals acquire bargaining unit lists by all means necessary and available to them.
- Support from state with template letters, file format etc.
- Support from state to compel compliance with information requests where applicable (example: as exclusive agent, enforce contract provisions, etc.)
- Locals have responsibility to cross check for members and potential members from their current membership list.
- Lists are aggregated at the state level for processing into NEA data systems.
- State staff responsibility for tracking locals who have sent in lists and following up to ensure all locals submit.
- Records with matching criteria for potential member category are processed with IMS Bulk- Uploader and assigned PM-1 or PM-2 or PM-0 as SEA and NEA membership class.
- Records not matching criteria for potential members are run through NEA systems and processes (direct match and distance match based on work location) to augment list with enough Personally Identifiable Information (PII) to meet Potential Member Category and then processed with IMS Bulk-Uploader.
- All potential Members are made available for local leaders and staff through NEA Data Systems to support their Membership Growth Strategies and track engagement data within NEA Data Systems.
- Remaining records without enough PII to meet Potential Member threshold are categorized as Leads.
- Leads are worked through field and digital engagement strategies to augment information to meet the requirements for Potential Members.

Suggested Best Practices for Affiliates:

- Local/state affiliates should prioritize contract language that allows local leadership to have access to new hires, potential members, and corresponding contact information.

- State and local affiliates should assess their list-acquisition process and protocols using NEA’s List Acquisition Program Assessment Form. Further, upon analysis the committee suggests that local/state affiliates update list-acquisition process and protocols to reflect best practices.
- State affiliates should provide NEA360 access to local leaders to build and strengthen organizing efforts and provide access to actionable data on potential members to support recruitment and engagement efforts at the local and worksite level. Additionally, the committee recommends that state affiliates provide initial and ongoing training in NEA360 use.
- State Affiliates should create and implement a process or protocol for locals to submit the following data annually to the State: local officers, building reps, bargaining unit lists, reconciling membership rosters, dues assessments, and other data to support the affiliate’s membership growth strategies. The data collected at the state association level should be shared with NEA and made available within NEA Data Systems such as 360 and VAN to support National Membership Growth Strategies.
- Further, state affiliates should explore offering incentives to locals for creating, collecting, and maintaining potential membership data. See Alaska and Arizona programs as examples.
- For example, NEA Alaska provides a \$10 per member subsidy for locals who meet a state standard for timely membership reconciliation, dues transmittal, and regular submission of full bargaining unit lists.
- Another example, Arizona Education Association will withhold local dues for any local that does not meet their dues and membership reconciliation standards.
- Local/state affiliates should move all membership lists and data (active and potential) to “NEA official” membership databases. Additionally, the committee suggests that all member organizers utilize official membership databases to conduct member and potential member outreach, engagement, and recruitment activities to ensure data is captured within NEA data ecosystems.
- Affiliates should adopt the NEA Universal Membership Form and/or audit their forms to include recommended language.

| Committee Recommendations | Board of Directors Action |
|--|---------------------------|
| <p><i>Charge 1: Identify model policies and best practices, develop a policy to submit these lists during the annual membership roll reconciliation, and move a standard national prospect policy.</i></p> | |
| <p><i>Charge 2: Review the current policies to track local leaders across the NEA enterprise. Identify opportunities to track local presidents, worksite leaders, activists, building reps, etc. and build systems to ensure NEA’s ability to successfully communicate with local leaders.</i></p> | |
| <p>1. That NEA provide technical assistance to states to implement the suggested best practices and protocols outlined in the committee’s report.</p> | <p>Adopt</p> |
| <p>2. That NEA create and deploy NEA360 Organizing Tools that will support Member Organizers in recruitment and engagement work to track organizing conversations and data from conversations with members and potential members within NEA Data Eco Systems.</p> | <p>Adopt</p> |

| | |
|---|-------|
| 3. That NEA continue to build out and refine processes and protocols to regularly sync data between NEA360 and VAN, and IMS to track engagement data with potential members, and that NEA create automatic/manual processes to analyze data in VAN, IMS, NEA360 to identify potential and active members. | Adopt |
| 4. That NEA create processes or protocols for collecting potential member data when they participate in NEA programs. For example, if a potential member completes micro-credentials, NEA should match that data to existing records within NEA Data Ecosystem and sharing this data with local leaders. | Adopt |
| 5. That NEA incorporate List Acquisition and potential member organizing trainings, support, and resources into all trainings for local and state leaders, and make resources and training on list acquisition available in the NEALMS system for local/state association leaders and staff. | Adopt |
| 6. That NEA investigate the ability to “transfer” NEA, SEA, and LEA memberships seamlessly between employers when a current member changes their employer of record within the current active membership year without the need for re-enrollment or filling out a new membership form. | Adopt |
| 7. That NEA work with state affiliates to build a process to identify Retired Educators as potential members, for example using the "Cancellation Reason" within IMS and 360, and share that potential member data with NEA Retired Leadership and staff to support their engagement and recruitment efforts. | Adopt |

Appendices:

In addition to these recommendations, the committee has included the following documents in the attached Appendices:

Appendix 1:

Year Round Organizing List Acquisition Toolkit List Program Assessment Presentations from: ISEA, MTA and MMS

Appendix 2:

NEA AK Incentive Program for Dues and Membership Reconciliation

Appendix 3:

NEA Model Membership Form

The committee heard from two state affiliates, ISEA and

Alaska Local Incentive as example:

Each local may apply for an annual \$10.00 per member subsidy. Locals with less than twenty- five members will receive a subsidy of \$250. A local will be entitled to receive a subsidy so long as the local has a written agreement with NEA-Alaska to which they insure the following:

1. membership reconciliations are performed by the local and received by NEA-Alaska by October 15, January 15, March 31 and June 1;
2. dues are collected from all members within the year for which they are charged; and
3. dues are transmitted to NEA-Alaska per the dues transmittal agreement renewed or renegotiated on or after January 15, 2021 and on file with NEA-Alaska.

4. payroll deduction summaries are submitted to NEA-Alaska electronically monthly or with each dues payment. The summary should include the member name, employee ID number, and the deduction amount.
5. a list of all bargaining unit members is submitted and received by NEA-Alaska preferably four times per year (August 1, September 1, October 31, January 15), but at least once per year at the beginning of the school year.
 - i. The bargaining unit list should include: Employee’s name, mailing and home addresses, personal phone number, personal email address, work location, job title, work hours, FTE status, and date of hire.

WE'RE HERE TO MAKE SURE THAT EVERY STUDENT SUCCEEDS.

Together, we are creating a future shaped by our members, worthy of our students, and essential to the nation.

[State
Affiliate
Logo]



Step 1: Join! NEA's 3 million members are united every day to guarantee a great public education for every student. Join us!

MEMBERSHIP COMMITMENT: YES!

I want to join my fellow employees and become a member of the local association, the [state association], and the National Education Association. I hereby request and voluntarily accept membership in these associations, and agree to abide by the Constitution and Bylaws of all three associations.

ANNUAL PAYMENT AUTHORIZATION: YES!

I hereby agree to pay the annual (Sep. 1 – Aug. 31) dues, fees, and assessments established by the three associations in consideration for the services the union provides. I understand that those annual amounts are subject to periodic change by the governing bodies of the associations. I authorize on a continuing basis, and regardless of my membership status, the payment of those annual amounts established by the three associations through [payroll deduction or other arrangement] unless I revoke this authorization in a signed writing sent to [state association address] via U.S. mail between August 1 and August 31 of the membership year immediately preceding the membership year for which the authorization is to be cancelled.

I UNDERSTAND THAT THIS AGREEMENT IS VOLUNTARY AND IS NOT A CONDITION OF EMPLOYMENT AND THAT I HAVE THE LEGAL RIGHT TO REFUSE TO SIGN THIS AGREEMENT WITHOUT SUFFERING ANY REPRISAL.

Signature: **Date:**

Dues payments are not deductible as charitable contributions for federal income tax purposes.

First Name: **Last Name:** **Employee ID No.:**

Personal Email: **Cell Phone*:**

Employer: **Worksite/Position:**

Address: **City:** **State/Zip:**

Ethnicity: American Indian/Alaska Native Asian Black Hispanic Multi-Ethnic
 Native Hawaiian/Pacific Islander Caucasian (not Hispanic origin) Other

Gender: Female Male Transgender Female Transgender Male Gender Expansive/Non-Conforming Other

* By providing my phone number, I understand that the National Education Association and its affiliates, including [state association], the local association, NEA Member Benefits and NEA360, may use automated calling techniques and/or text message me on my cellular phone on a periodic basis. The National Education Association, the [state association], and the local association will never charge for text message alerts. Carrier message and data rates may apply to such alerts.

Step 2: Support elected officials who support public education

By contributing to our PAC, you help advance policies impacting our students, our members, and public education.

YES! I WANT ELECTED OFFICIALS WHO STAND UP FOR PUBLIC EDUCATION AND MY STUDENTS.

I hereby authorize the following contribution to be split evenly between the NEA Fund for Children and Public Education, [State], and [Local] to build a strong voice for educators.

I want to donate: \$10 \$5 \$1 \$ per pay period

The NEA Fund for Children and Public Education [and state and local funds] collect voluntary contributions from Association members and use these contributions for political purposes, including, but not limited to, making contributions to and expenditures on behalf of friends of public education who are candidates for office. Only U.S. citizens or lawful permanent residents may contribute to the NEA Fund [and state and local funds]. Contributions to the Funds are voluntary; making a contribution is neither a condition of employment nor membership in the NEA [the SEA] and LEA, and members have the right to refuse to contribute without suffering any reprisal. Although the NEA Fund [and SEA and LEA Funds] requests a donation in the amounts listed above, these are only suggestions. A member may contribute more or less than the suggested amounts, or may contribute nothing at all, without it affecting their membership status, rights, or benefits in NEA or any of its affiliates.

Contributions to The NEA Fund [and state and local funds] are not deductible as charitable contributions for federal income tax purposes (+ any state provisions).

Federal law requires the NEA Fund to use best efforts to report the name, mailing address, occupation, and name of employer for each individual whose contributions aggregate in excess of \$200 in a calendar year (+ state requirements).

Signature: **Date:**

Step 3: Tell us more

As an educator, you have a close-up view of the opportunities and challenges facing our schools. These questions will help us provide the support you and your school need most.

1. What year did you enter the profession?

2. Your association provides support and tools to ensure your success with students. What tools/trainings would you like to hear more about?

- Classroom management (e.g. student behavior, relationships with students)
- Lesson planning
- Working with mentors/coaches
- Working with families
- Collaborating with administrators and colleagues
- Unpacking professional expectations (e.g. evaluations, observations)

3. Your association works to ensure that schools provide students with opportunities to succeed. Which issues matter most to you?

- Social and racial justice
- Meeting the needs of students in poverty
- Family and community engagement
- Fully funded schools
- Education policy (Contributing to critical decisions affecting my students, school, and district)
- Political advocacy (Supporting education policies to ensure all students have opportunities to succeed)

4. Your association advocates for conditions that retain high-quality educators for all students. Which of these are you interested in learning about?

- Salary
- Educator rights & responsibilities
- Health care benefits
- Pensions and retirement security
- Student debt and/or finances
- Stretching your paycheck
- Working conditions

State/local content:

Step 4: Payment info CASH/CHECK (requires full payment of annual dues) PAYROLL DEDUCTION CREDIT/DEBIT CARD*

Name on Account: Billing Address:

City: State/Zip: Card Number:

Exp: (M/Y) Name as it Appears on Card:

ELECTRONIC FUNDS TRANSFER (EFT)* Account Type: Checking Savings

Name on Account: Address:

City: State/Zip: Name of Bank:

9-Digit Bank Routing Number: Account Number:

**I authorize the [State Association] or its designated local to charge my credit/debit card or checking/savings account, as provided above, for annual membership dues, fees and assessments required for membership in the associations, and for any PAC contribution I have authorized. I further authorize those payments to be made through the initial membership year ending August 31, 2020, and on a recurring basis thereafter, payable in monthly installments on the __ day of each month, in the amounts set forth below. I understand that the final charged/debited installment amount for the membership year will include any residual amount owed, not to exceed [Range]. The residual amount represents the portion of the combined total that cannot be evenly distributed among the installments.*

I understand that in the event one or more of the governing bodies of NEA or its affiliates authorizes a change in the amount of annual dues, fees and/or assessment, the [State Association] or local will notify me by email or home mailing address not less than (10) days in advance of processing any changes to the transaction amount as described in the payment summary. Following that notice, I authorize the [State Association] or local to adjust the amount to be charged to or debited from my account to satisfy any modification by adjusting my payments equally over the payment schedule.

I understand that this authorization for the payment of membership dues, fees and assessments continues year-to-year and shall remain in effect until the earlier of: 1) my written notice of termination, or 2) the termination of my eligibility to maintain membership in the Association. I understand that the rejection of any electronic funds transaction shall not constitute the termination of my membership in the NEA. I further understand that [State Association] or the local will notify me in writing if a transaction is rejected and I shall have seven (7) calendar days to provide updated account information or an accepted alternative method of payment, to continue my payments for annual dues, fees, and assessments.

| MONTHLY DUES DEDUCTION: (for office use only) | <input type="checkbox"/> FULL-TIME | <input type="checkbox"/> HALF-TIME | <input type="checkbox"/> PAC |
|---|------------------------------------|------------------------------------|------------------------------|
| 10 deductions by EFT or credit/debit card, or <input type="text"/> deductions by payroll. | \$ <input type="text"/> /mo. | \$ <input type="text"/> /mo. | \$ <input type="text"/> /mo. |

Signature: Date:

Table of Contents

| | |
|---|----|
| Introduction: Why is it Important to Have Good Lists? | 2 |
| Model List Acquisition Processes | 4 |
| Opportunity 1: Policy Change | 5 |
| Opportunity 2: Negotiated Language | 6 |
| Opportunity 3: Relational Information Request | 8 |
| Opportunity 4: Utilize Publicly Available Data | 8 |
| Opportunity 5: Freedom of Information Act (FOIA) Request | 9 |
| Appendix A: Florida Education Association Model List Acquisition Process | 10 |
| Appendix B: State Laws Supporting Effective Union Representation <i>(As of 12/2019)</i> | 11 |
| Appendix C: Sample FOIA Letter | 15 |
| Appendix D: Sample Relational Request Letters <i>(Exclusive Representative & Not Exclusive Representative)</i> | 16 |

The National Education Association (NEA), the nation's largest professional employee organization, is committed to advancing the cause of public education. NEA's three million members work at every level of education – from pre-school to university graduate programs. NEA has affiliate organizations in every state and in more than 14,000 communities across the United States.

Who to Contact:

Year-Round Organizing: neweducator@nea.org

Data and Analytics: datahelp@nea.org

Collective Bargaining and Member Advocacy:
collectivebargaining@nea.org

Our Leadership:

Lily Eskelsen García, NEA President

Rebecca Pringle, NEA Vice President

Princess R. Moss, NEA Secretary-Treasurer

Kim A. Anderson, NEA Executive Director

NEA Executive Committee:

Eric R. Brown, Illinois

Shelly Moore Krajacic, Wisconsin

Robert Rodriguez, California

Christine Sampson-Clark, New Jersey

George Sheridan, California

Hanna Vaandering, Oregon

Introduction: Why Is It Important to Have Good Lists?

Now more than ever, strong public sector unions depend on their members. It is essential to meet and organize prospective members as early as possible. Accessing and maintaining up-to-date information on all employees represented by the Local Association is an essential building block to a strong and effective organization.

There are a number of strategies used by affiliates across the country to access and maintain up-to-date contact and worksite information. The opportunities below are recommended in order of strength: The higher the recommendation, the more durable and secure your union's rights to effectively represent and organize your members and potential members.

1

Policy Change:

Policy change can be achieved at the state level through legislation or administrative/executive action, or at the local level through ordinances or school board policy changes. Many states have passed bills that require employers to provide union representatives with contact information for new hires and for all employees in the bargaining unit, and to grant access to new employee orientations. We can seek policy changes even in states or localities that do not allow full collective bargaining.

2

Negotiated Language:

Associations can and should negotiate contract language that requires every employer to provide contact information for new hires and for all employees in the bargaining unit. Even in states without collective bargaining, it is possible to secure language through the "meet and confer" process by writing these priorities into employee policy manuals and other formal documents.

3

Relational Information Request:

Many Associations have good working relationships with districts and can get employee contact information simply by submitting an information request to the district superintendent or human resources director. Where the Association has formal recognition as the exclusive representative, that status usually carries with it an obligation to represent the interests of everyone in the "unit" – whether they are Association members or not. Therefore, the Association has a right to know who that includes and how to contact them. Even in units without exclusive representation, employers should honor information requests. Nevertheless, relationships can change, so we recommend that the local push for policy changes or negotiated language whenever possible.

4

Utilize Publicly Available Data:

In many districts, it is possible to assemble worksite data on education employees by systematically culling information from publicly available school websites.

5

FOIA Request:

When a superintendent or school board is unwilling to voluntarily agree to share the necessary information, filing an official "Freedom of Information Act" or "Right to Know" request under your state law may provide access to some basic information on public employees. However, we should advocate in favor of limiting what information is available through FOIA; we have a legitimate need and purpose for this data, but others might use it to harass and invade the privacy of our members.

Which Data Fields Are Most Important?

Basic identification and contact information is essential. This should include:

- ▶ **First name**
- ▶ **Last name**
- ▶ **Employee ID number**
- ▶ **Home address**
- ▶ **Home telephone number**
- ▶ **Personal cell phone number**
- ▶ **Personal email address**

Basic worksite information is also essential. This can include:

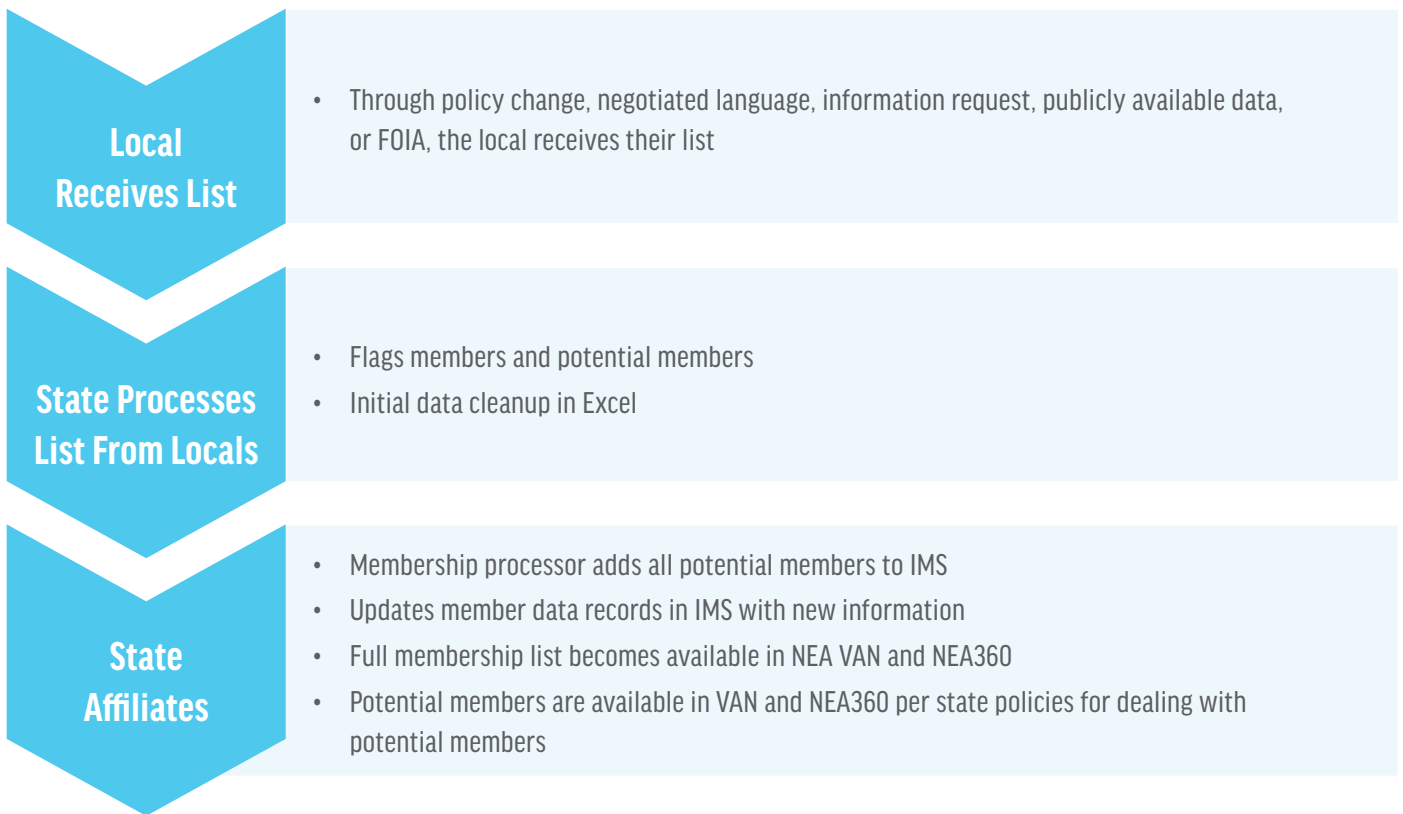
- ▶ **Job title**
- ▶ **Work location**
- ▶ **Current assignment**
- ▶ **Work phone number**
- ▶ **Work email address**
- ▶ **Date of hire**

Where appropriate for the membership unit, this can also include:

- ▶ **Part-time or full-time**
- ▶ **Work shift**



Model List Acquisition Processes



NEA membership data is stored within our “IMS System,” which was designed for storing membership information for processing dues. NEA360 is being built over IMS as a portal for members to maintain their contact information and allow more online interaction with their union. In addition to membership information being stored in IMS, the data is synced twice per month to bring the data into MyWorkers VAN and MiniVAN: software that is available for field staff and local affiliate leaders for organizing and engaging both current and potential members.

No action is needed for states to bring their membership information into VAN; however, potential member data, which is often not in IMS, can either be included within the regular IMS data entry coded as “Potential Members,” or the lists can be matched to the Catalist voter file and uploaded to VAN.

The Catalist data match may enhance the data with additional contact information (*phone number, address, and email*) that was not included in the source file. This provides additional options for contact, and the software provides tools for outreach through door-to-door canvass, phone calls, or worksite visits. The data can also be exported for mail vendors.

Bargaining unit lists – and new hire lists – can either be processed through IMS or they can be added to MyWorkers VAN. When imported to VAN, they are saved in a folder for direct access.

State Data Leads with moderate/advanced experience with formulas in Microsoft Excel can receive training and access to Catalist’s Match tool by reaching out to the Center for Organizing Data Team.

Alternatively, the Data and Analytics team in NEA’s Center for Enterprise Strategy can process and upload the lists when you submit your files to datahelp@nea.org.

See Appendix A for a case study on Florida Education Association’s process for list acquisition that focuses on roles and responsibilities at the local and state level.

Opportunity 1: Policy Change

Policy change can be achieved at the state level through legislation or administrative/executive action, or at the local level through school board policy changes or local ordinances.

- ▶ **STATE LEGISLATION:** State legislation is an important way to secure access to data on the educators we represent. Armed with statutory language, we can bargain stronger contracts and secure regular access to information without frequent requests.
- ▶ **STATE ADMINISTRATIVE POLICY OR EXECUTIVE ACTION:** Working with the governor and within the relevant state departments (*ex. Education, Labor*), states have secured policy changes that support access to data on the educators we represent.
- ▶ **SCHOOL BOARD POLICY:** Without action taken at the statewide level through legislation or administrative action, Local Associations may secure policy at the school board level to secure access to data on the educators we represent.

Affiliates' efforts have focused on two main areas:

- Data and Lists: Securing Rights to Contact Information for New Hires and All Represented Employees
- New Employee Orientations (*NEOs*) and other access to New Employees

Data and Lists: Securing Rights to Contact Information for New Hires and All Represented Employees


In order to engage and sign up new bargaining unit members, we must know who they are as early as possible. In order to effectively represent everyone in the bargaining unit, and to recruit members at key times (*for example, during the contract process*), we need regular electronic delivery of bargaining unit lists. With rights to data and lists secured in statute, policy, or bargaining, we have the framework needed to negotiate for efficient, effective provision of employee data.

Whenever possible, we should ground our right to receive contact data on new employees in our status as democratically elected bargaining representatives that are charged with the duty of working on behalf of every employee in the bargaining unit. To get this information, we should not have to rely on "Right to Know" laws available to the general public, including our right-wing opponents; in fact, laws including the 2019 bill passed in Illinois, SB 1784, contain provisions to protect sensitive employee data from disclosure under freedom of information acts. Nor do we need to make information requests through bargaining.

In 2017, California passed a model statute mandating early and frequent delivery of new employee data in AB119. Hawaii, Illinois, Maine, Maryland, Massachusetts, New Jersey, New York, Oregon, and Rhode Island have passed similar provisions. Key points to look for in language are 1) limiting data access to the bargaining agent, and restricting access by third parties in order to protect our members from intrusive approaches from anti-worker, anti-union organizations; and 2) the delivery of data in electronic form. The language following this sentence, taken from the statute passed in New Jersey in 2018, provides a model; others are linked in Appendix B.



Model Legislative Language

- 
- ▶ Within 10 calendar days from the date of hire of negotiations unit employees, public employers shall provide the following contact information to an exclusive representative employee organization in an Excel file format or other format agreed to by the exclusive representative employee organization: name, job title, worksite location, home address, work telephone numbers, and any home and personal cellular telephone numbers on file with the public employer, date of hire, and work email address and any personal email address on file with the public employer. Every 120 calendar days beginning on January 1 following the effective date of this act, public employers shall provide exclusive representative employee organizations, in an Excel file or similar format agreed to by the employee organization, the following information for all negotiations unit employees: name, job title, worksite location, home address, work, home and personal cellular telephone numbers, date of hire, and work email address and personal email address on file with the public employer.

The home addresses, phone numbers, email addresses, dates of birth, and negotiation units and groupings of employees, and the emails or other communications between employee organizations and their members, prospective members, and non-members, are not government records and are exempt from any disclosure requirements of P.L.1963, c.73 (C.47:1A-1 et seq.).

Opportunity 2: Negotiated Language

Strong contract language not only specifies the data fields to be shared, but also guarantees that the employer provide the information in a regular, timely manner, preferably on a biweekly basis (*for example, with the regular transfer of payroll deductions*).

Further provisions can and should require that information on all new hires be provided immediately upon hiring, not simply after they begin working. The regular transfer of unit member information should also include clear listing of employees who have retired, resigned, been dismissed, gone on long-term unpaid leave, been promoted or re-assigned, or otherwise left active employment in the unit.

Given state FOIA and "Right to Know" laws, affiliates should consider negotiating language that requires transparency in public information requests regarding our members, or at the very least, gives the union advance notice and an opportunity to respond when a third party has requested such information. We have uniquely legitimate reasons, and often a legal duty, to understand and contact the workers we represent. But as we know from experience, other organizations will use requests for public data to invade our members' privacy.

Model Contract Language for Unit Member Information

- ▶ **Section 1.** At the beginning of each contract year, and at least every 120 days thereafter, the Employer shall supply the Union with the following information for each employee:
 - name, home address, telephone number, cell phone number, and email address;
 - employee identification number;
 - most recent date of hire and seniority date(s), if different;
 - job title, current assignment, work location, work telephone number, and work email address; and
 - salary and/or any other form of compensation.

- ▶ **Section 2.** At the beginning of each contract year, and at least every 120 days thereafter, the Employer shall supply the Union with the following information for each employee:
 - new hires, resignations, retirements, long-term unpaid leaves of absence, dismissals, and/or any other separations from employment; and
 - any other changes in the information specified in Section 1 and the effective date of such changes.

- ▶ **Section 3.** The Employer shall furnish the Union with the information specified in Section 1 for each new employee within one week after his/her date of hire.

[NEA's Collective Bargaining and Member Advocacy Department](#) maintains a contract database from across the country and can provide samples of contract language guaranteeing access to unit member information. Specific examples include:

Example: United Faculty of North Orange County Community College District (CA)

INFORMATION REGARDING UNIT MEMBERS

The Association shall have the right to receive, within a reasonable time, upon request, names, job titles, and information regarding compensation of all unit members. If requested by the Association, and authorized by the employee, such listing shall include home addresses and telephone numbers.

Here is another sample of how the issue can be addressed in contract language:

ACCESS TO EMPLOYEE HOME ADDRESS AND TELEPHONE NUMBERS

On a monthly basis, the University shall provide the union with an electronic list via File Transfer Protocol (FTP) of all employees in the bargaining unit. The list will include the following data fields: name, title, title code, date of hire, annual salary rate, percentage appointment, appointment type, campus mailing address and hiring unit, email address, separation date and reason, leave of absence date and reason, and dues indicator. In addition, the list will include the home address and telephone number of bargaining unit members unless the employee has specifically requested that the home information not be released.

The University will provide a weekly list of changes (e.g. new hires, corrections, transfers, salary changes) via FTP that have occurred within the bargaining unit. The data fields provided via FTP are subject to change upon agreement of the parties...

Upon written request, the University will provide the undisclosed home addresses to a mutually agreed-upon mailing service firm through which [the union] can correspond with said individuals. The mailing service shall keep confidential the home address of the employees who have requested that their home information not be released. The union will bear all costs associated with this service.

Opportunity 3: Relational Information Request

Where the Association is recognized as the exclusive representative of the employees in the unit, it can make information requests for employee information as needed for the union to fulfill its statutory bargaining obligations. Such requests should be specifically grounded in the union's statutory bargaining obligations so as to indicate that lists should only be given to the union because of its special status as the bargaining representative.

Where the Association does not have recognition as the exclusive representative of the employees, an information request may still bear fruit. Exercise caution with this approach, however, as the employer may conclude that it must share similar information with other third parties who request it. Wherever possible, we should stress our uniquely legitimate need for the data, given our role as a representative of public workers.

See sample letters in Appendix D.

Opportunity 4: Utilize Publicly Available Data

This refers to the process of automated data collection from publicly available databases of information. Many universities post class schedules and faculty information on public facing websites that can be collected into Excel. Publicly available information on course schedules can be especially useful in finding and communicating with adjunct faculty.

Data mining services are available from the NEA Data Team for state and local affiliate organizers needing potential member lists. The requestor must identify the specific URL location of the data to be collected as well as the columns to be included.

The Center for Organizing Data Team relies on field staff and affiliates to identify areas where this data is available. Requests for scraped data can be submitted at any time, to datahelp@nea.org.

Opportunity 5: Freedom of Information Act (FOIA) Requests

Public information laws and privacy laws vary from state to state. In many states, NEA and affiliates have worked hard to protect member privacy by ensuring that detailed public employee personal information is not subject to disclosure to third parties under the state FOIA law. If the options above for obtaining employee information are not available or efforts are unsuccessful, you may be able to obtain some such information through your state's FOIA law. Check with your affiliate counsel before going this route, as you do not want to inadvertently open the door to disclosure of employee information to third parties if it does not currently exist in your state.

Where a FOIA request is available and makes sense to pursue, it can be submitted to the District Superintendent for information on district employees.

State and Local Associations can also submit FOIA requests to state retirement agencies and state certification agencies to gather information on members and prospective members who are either in state retirement plans and/or are certified by state agencies. This has proven a particularly insidious way for anti-worker organizations to gather lists of union employees; in some states, we have advocated to limit access to that information to secure the privacy of our members and retirees.

For a useful starting point in crafting such requests, see the model templates maintained by the National Freedom of Information Coalition (www.nfoic.org) for each state. As always, you should check with your affiliate counsel to confirm the reliability of the citations and models offered on that website.

<https://www.nfoic.org/organizations/state-sample-foia-request-letters>

APPENDIX A: Florida Education Association Model List Acquisition Process

Conditions in Florida:

- F.S. Chapter 447 Collective Bargaining Rights.
- Liberal public records laws, making public employees' names, addresses, salary, etc. public record unless exempt (*e.g. law enforcement and their family*).
- 2018 FL Legislature passed a law that forces each local teacher's union to report its density to the Public Employees Relations Commission. Locals not reporting 50% or higher density yearly would be decertified and forced to go through the card collection process and an election to recertify as the bargaining agent.



Results:

FEA developed a statewide process for acquisition and verification of potential member lists/bargaining unit lists in order to assist locals with complying with the new reporting requirements of the law.

Every teachers' local in the state reached the 50% or higher density threshold, as required, in 2018 and 2019.

How:

Organizing and Field Services worked with IT to **develop a master spreadsheet** that includes number in bargaining unit, number of members (based on IMS), density percentage, PERC recertification date, etc. for each local. The spreadsheet calculates density and highlights locals below 50%.

For **state option locals**, information for the spreadsheet is reported monthly by each state option local membership secretary to the Office of Organizing and Field Services. During the first year, information was reported weekly, but has now changed to monthly. Reports are due to the OFS office by the 15th of the month and must highlight any changes to the bargaining unit number. If a change has occurred to the overall bargaining unit number, the OFS office reports it to IT who then changes the spreadsheet to reflect the change (*so the density reflects actual bargaining unit numbers*). At the beginning of each month, IT runs a membership report that is reviewed by the FEA Vice President and the OFS Director. When approved, it is distributed to all state officers, OFS managers, NEA and AFT contacts. NEA's Tom Israel receives this report monthly. Reports are distributed to the FEA Governance Board quarterly.

For **local option locals**, affiliate field staff (*regional specialists, service unit directors, etc.*) are each assigned to a local for communication of important information, even if they are not actively working in that local. These personnel contact the staff or leaders in the local options quarterly to collect their bargaining unit data. The information is added to the spreadsheet and updated when changes occur.

For the infrequent cases where the district refuses or delays in providing the information needed, **FEA has developed several form letters** for locals to provide as a public records request or demand. Because of the public records laws and the collective bargaining provisions in the Florida Constitution and law, most school districts provide the information on a bargaining unit through a simple request made to their payroll or IT department by the local leader or local staff (if local option), or by the service unit or local membership secretary (*if state option*) without a formal demand.





Locals who have had repeated difficulty in receiving the information they need are encouraged to **bargain contract language** that outlines the information they would require for developing a time/experience grid for bargaining such as name, worksite, position title, years of experience, salary, address, etc.

Importance of Relationships:





Local leaders and membership secretaries develop relationships with their counterparts in the school district central office (sometimes they are our members) to maintain good data and information. In situations where there is a breakdown in that relationship, often a call between a staff attorney and the district's attorney can clarify the union's right to have the information they are requesting. In rare instances, a more formal response has been needed to get a district to comply, often as a result of complicated bargaining issues not related to the information being requested.

APPENDIX B: State Laws Supporting Effective Union Representation (As of 12/2019)






NEA Office of General Counsel

| State | Year Passed | Bill No. | Key Provisions |
|--|-------------|-------------------------|---|
|  California | 2017 | AB 119 | <p>Data and Lists: Grants certified representative timely, regular access to information about new hires and represented employees; sets timelines for receiving lists.</p> <p>New Employee Orientations (NEOs): Provides certified representative mandatory access to NEOs, sets requirements for notice. Grants rights to bargain and arbitrate over the structure, time and manner of NEOs.</p> |
| | 2018 | SB 866 | <p>NEOs: Expands coverage of NEO law, restricts access to information re: time and place of NEOs.</p> <p>Dues Deduction, Maintenance of Payment (MOP): Requires employer to honor the terms of the employee's deduction authorization and provides that employers shall rely on information from employee organization regarding whether to end or change deductions.</p> <p>Dues Deduction, Custodian of Record (COR): Requires employer to process deductions pursuant to the employee organization's certified list of individual employee deduction authorizations without requiring submission of a copy of those authorizations, unless a dispute arises. Provides that employee organization shall indemnify the employer for employee claims made in reliance on its certification.</p> <p>Neutrality: Strengthens employer neutrality policy; sets requirements for review of mass communications.</p> |
|  Delaware | 2018 | HB 314 | <p>Dues Deduction, MOP: Requires employer to honor terms of dues authorization, including maintenance of dues payment. Further provides process to revoke where authorization silent.*</p> |
|  Hawaii | 2018 | HB 1725 | <p>MOP: Seeks to establish timeframe and process for employee revocation of dues deduction authorization.*</p> |
| | 2019 | HB 845 | <p>NEOs: Mandates new hire orientation for state employees; gives exclusive representative access.</p> |
| | 2019 | HB 157 | <p>Data and Lists: Requires employers to disclose to exclusive representatives contact data on employees in bargaining unit, as well as data on new hires.</p> |
|  Illinois | 2018 | SB 1784 | <p>Data and Lists: Requires employers to provide exclusive representatives with digital lists of employees in the bargaining unit, and new employees within 10 days of hire.</p> <p>Employee Data Protection: Protects some data and communications between union and employees from disclosure under state FOIA. Also protects data held by a pension fund or retirement system. Mandates employer disclosure to exclusive representatives any such FOIAs; creates right to file ULP if unwarranted disclosures.</p> |




NEA Office of General Counsel

| State | Year Passed | Bill No. | Key Provisions |
|--|-------------|-----------------------------------|---|
|  <p>Illinois (Continued)</p> | 2019 | SB 1784 | <p>Access to New Employees: Grants right to one-on-one meetings with new employees at worksite and on paid time, for up to 1 hour, within 2 weeks of hire.</p> <p>Access: Grants access to employees at worksite for matters related to representation; grants access to bulletin boards, mailboxes, and email (<i>if bargained</i>).</p> <p>Dues Deduction, MOP: Requires employer to make deductions to exclusive representatives per terms of employee's written authorization, including electronic authorization; permits reasonable MOP provisions.</p> <p>Dues Deduction, COR: Employee requests to authorize, revoke, or change deductions directed to exclusive representatives, who shall provide to or notify employer of these requests. Employer shall make deductions pursuant to information provided by the exclusive representatives, who shall indemnify employer for claims in reliance on that information. Failure to comply shall be ULP; IPLB shall have jurisdiction, hold disputed deductions in escrow.</p> <p>Neutrality: Employer shall not discourage, deter, etc. public employees from joining, authorizing representation by, or making payments to labor organizations, nor permit third parties to use email to do so.</p> |
|  <p>Maine</p> | 2019 | HP 1063 - LD 1451 | <p>Data and Lists: Requires employers to provide bargaining agent with information on employees in unit and new hires; restricts sharing of some data beyond bargaining agent.</p> <p>NEOs: Provides bargaining agent with right to meet with new hires during new employee orientations or in individual or group meetings.</p> <p>Access: Grants bargaining agent right to access members of unit at workplace, use employer email system for certain purposes</p> |
|  <p>Maryland</p> | 2018 | SB 819 | <p>Data and Lists: Grants certified representative of school employees timely, regular access to information regarding new hires and all represented employees.</p> <p>NEOs: Requires public school employers to provide exclusive representatives with access to new employee processing, and establishes right to negotiate the structure, time, and manner of that access.</p> |
|  <p>Massachusetts</p> | 2019 | H3854 | <p>Data and Lists: Establishes employee organization rights to contact data for public employees, protects information from general disclosure. Provides that employer must supply new hire information within 10 days after employee accepts an offer of employment.</p> <p>NEOs: Grants employee organization right to meet with new hires during NEOs or at individual or group meetings.</p> <p>Access: Grants employee organizations right to hold meetings at worksite, and access to employer email system and buildings, for certain purposes.</p> <p>Dues Deduction, MOP: Requires employer to make payroll deductions pursuant to the terms of the employee's written authorization, and provides that employers shall honor the revocation terms of that authorization provided it may be irrevocable for a period of no longer than 1 year.</p> |

NEA Office of General Counsel

| State | Year Passed | Bill No. | Key Provisions |
|---|-------------|---|---|
|  Massachusetts <i>(Continued)</i> | 2019 | <u>H3854</u> | <p>Representation Fees: Exclusive representatives may require non-member to pay for reasonable costs of grieving or arbitrating a matter arising under a CBA; limits DFR to negotiation and enforcement of CBA terms.</p> |
|  New Jersey | 2018 | <u>A3686</u> | <p>Data and Lists: Mandates timely provision of new hire lists and contact data (<i>10 days</i>) and regular provision of data regarding represented workers. Protects sensitive data from public release.</p> <p>NEOs: Provides exclusive representative with right to access NEOs.</p> <p>Access: Secures exclusive representative rights to access NEOs, employee contract data, employer email systems, and employer buildings; protects access rights pursuant to grievance and binding arbitration procedures.</p> <p>Dues Deduction, MOP: Strengthens existing law on payroll deduction; clarifies validity of electronic authorization. Creates a statutorily defined process for employees to revoke deduction authorization.*</p> <p>Neutrality: Establishes policy of public employer neutrality on union membership and support.</p> |
|  New York | 2018 | <u>S.7509-C (RRR)</u> | <p>Data and Lists: Mandates timely provision of data on new hires, transfers, and promotions into unit.</p> <p>NEOs: Grants union right to meet with new hires for specified amount of time (<i>not NEO-specific</i>).</p> <p>Dues Deduction, MOP: Provides obligation to deduct dues, and begin deductions in timely way; requires employer to honor terms of membership authorization to maintain dues payment.</p> <p>Representation: Clarifies that DFR does not reach beyond CBA. Permits negotiation to relieve union of obligation to represent non-members in certain cases.</p> |
|  Nevada | 2019 | <u>SB135- State EEs</u> | <p>Dues Deduction, MOP: Requires state to bargain provisions to deduct payments to the exclusive representative, and to revoke authorizations only in the manner prescribed in the authorization.</p> <p>(State) Employer Neutrality.</p> |
|  Oregon | 2019 | <u>HB2016</u> | <p>Data and Lists: Requires employer to provide employee contact data within 10 days for new hires, and every 120 days for employers in bargaining unit.</p> <p>NEOs: Provides right to meet with new employees on paid time during NEO, or if no NEO held, at individual or group meetings.</p> <p>Access: Mandates comprehensive access for exclusive representative, including access to new employees and to bargaining unit employees for specified purposes; permits use of employer property and email for defined purposes; grants release time to engage in activities on behalf of exclusive representative, including participating in NEOs or other new hire meetings, pursuant to negotiation.</p> |

NEA Office of General Counsel

| State | Year Passed | Bill No. | Key Provisions |
|--|-------------|-------------------------------|--|
|  Oregon <i>(Continued)</i> | 2019 | HB2016 | <p>Dues Deduction, MOP: Requires public employer to make payroll deductions authorized by employees; provides that deductions remain in effect until employee revokes pursuant to the terms of the authorization.</p> <p>Dues Deduction, COR: Labor organization shall provide to each employer a list of individual employees who have authorized deductions to the labor organization; public employer shall rely on the list to make deductions. Employer shall not be liable for unauthorized deductions made in reliance on the list; labor organization shall indemnify employer amount of any unauthorized deduction resulting from reliance on the list.</p> |
|  Rhode Island | 2019 | H5259 - SUB A | <p>Data and Lists: Requires state, teacher, and municipal employers to provide exclusive representative with information on new hires.</p> <p>Dues Deduction: Requires state employers to make deductions, and continue until employee files written notice to stop with bargaining representative.</p> <p>(State) Employer Neutrality.</p> <p>Representation Fees (Teachers, Local and State Employees): Permits labor organizations to charge fees to cover reasonable costs of grievance hearings and arbitration.</p> |
|  Washington | 2018 | SB 6229 | <p>NEOs: Requires employer to provide exclusive bargaining representative with reasonable access to new employees, during an NEO provided by employer or at another mutually agreed time.</p> |
| | 2019 | HB 1575 | <p>Dues Deduction, MOP, COR: Requires employer to deduct dues following employee's authorization to the exclusive bargaining representative. States that deductions shall begin upon notice of authorization from exclusive representative and shall remain in effect until revoked in accordance with terms of authorization, and following confirmation from the exclusive representative. Employer shall rely on information provided by the exclusive representative regarding authorization and revocation of deductions.</p> |

**Not best practice language.*

APPENDIX C: Sample FOIA Letter

Dear <DISTRICT SUPERINTENDENT/CONTACT>,

Pursuant to the Colorado Open Records Act § 24-72-201 et seq. and/or the Colorado Criminal Justice Records Act § 24-72-301 et seq., I request that you make available for inspection and copying the following public records: The names of all school employees, their worksite, and grade/subject assignments. This file should be in Excel format and include publicly available contact information on file with the employer. If you are not the custodian of records for this request, please forward this letter to the appropriate person or let me know which person(s) has custody of these records.

This information is not being sought for commercial purposes. If there are any fees for searching or copying these records, please inform me if the cost will exceed \$__.

Please set a date and hour, within three working days following receipt of this letter, at which time the records will be made available for inspection. If access to these records will take longer, please cite the extenuating circumstances and let me know when I should expect copies or the ability to inspect the requested records.

I ask that records available in electronic format be transmitted by email to [Your Email Address].

If you deny any portion, or all, of this request, please provide me with a written explanation of the reason(s) for your denial, including a citation to each specific statutory exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.

If you conclude that portions of the records that I request are exempt from disclosure, please release the remainder of such records for inspection and copying, redacting only the portion or portions that you claim are exempt.

Please contact me with any questions about my request. Thank you for your time.

Sincerely,

<Local President Name>

<Street Address>

<City, State ZIP Code>

<President's Phone Number>

<President's Email Address>

As we know from our experience in right-to-work states, having detailed information on prospective members is essential. And given the growing national onslaught against union rights, we cannot take our access to unit member information for granted. If you have questions or need assistance, please contact the Data and Analytics Department at datahelp@nea.org or the NEA Collective Bargaining and Member Advocacy Department at collectivebargaining@nea.org.

APPENDIX D: Sample Relational Request Letters

(Exclusive Representative & Not Exclusive Representative)

Letter 1:

Dear <DISTRICT SUPERINTENDENT/CONTACT>,

As the exclusive representative for the <INSERT UNIT DESCRIPTION > unit, the Association has an obligation to represent all the employees in the unit. Therefore, in order to fulfill that obligation, we are requesting the following information about the employees in the unit.

We are requesting that the data be provided electronically, in Excel format, with the following fields:

- First name
- Last name
- Employee ID number
- Home address
- Home telephone number
- Personal cell phone number
- Personal email address
- Job title
- Work location
- Current assignment
- Work phone number
- Work email address
- Date of hire

I am sure you can appreciate why it is necessary for the Association to have comprehensive, up-to-date information on all the employees that we have an obligation to represent, so that we can both identify and communicate with them.

If you have any questions, please let me know. I look forward to working with you or your staff, both to fulfill this request, and in our continuing shared efforts to protect and improve our public schools.

Sincerely,

<Local President Name>

<Local Association Name>

Letter 2:

Dear <DISTRICT SUPERINTENDENT/CONTACT>,

As we move into the new school year, we hope to continue building on our partnership in the pursuit of excellent public education in <District Name>. We share with you a deep commitment to advocating for our schools and our students.

We are writing to request an electronic list of the employees in the <INSERT UNIT DESCRIPTION >, so that we may reach out to them to ensure that they continue to be informed and effective ambassadors and advocates for our schools and our students.

We are requesting that the data be provided electronically, in Excel format, with the following fields:

- First name
- Last name
- Employee ID number
- Home address
- Home telephone number
- Personal cell phone number
- Personal email address
- Job title
- Work location
- Current assignment
- Work phone number
- Work email address
- Date of hire

We look forward to working with you on this, and on protecting and preserving our system of public education for years to come. Please let me know if there are any questions, along with what the next steps should be to make this happen.

Sincerely,

<Local President Name>

<Local Association Name>

State Affiliate List Acquisition Program Assessment

Background: High-quality employee lists of NEA's and our affiliates' members and potential members are at the core of great organizing work. For our union to maintain our strength in a RTW and COVID-19 virtual environment, it is paramount that we develop a comprehensive list acquisition & prospecting strategy grounded in the complexities of our state and local associations. To achieve this goal, NEA has hired data and list acquisition consultants to partner with your affiliate on the opportunities below. The questions will allow us to target support across our affiliates.

Our Opportunities to Drive Culture Change

- Drive buy-in across our local affiliates for strong, durable list acquisition & cleaning systems.
- Develop local buy-in to gather lists with sufficient personally identifiable information.
- Support our UniServ Directors, Organizers, and Local Presidents to enforce the local union's right to full lists where applicable, update local contract language, and expand state statutory access to robust lists.
- Build a system of distributive responsibility for affiliates with large numbers of locals.

Our Opportunities to Update Systems & Processes

- Build long-term capacity with clear processes and systems within state affiliates.
- Develop a clear, defined set of national standards for the submission and categorization of "leads" and "potential members" in NEA's database ecosystem.
- Support our affiliates in achieving best practices on cleaning and updating potential member data in NEA360.
- Enhance our capacity to consolidate multiple lists and upload them into a standard system.

Name of Affiliate:

Role 1 - NEA Field Staff

Name:

- Gather answers to key questions
- Engage with state affiliate acquisition lead to develop acquisition plan or to incorporate this program into current acquisition plans
- Coordinate data moving to Data Team Processing contact

Role 2 - NEA Data Consultant Team Processing contact(s)

Name(s):

- Process incoming data from states to incorporate into NEA360 and other databases
- Develop FAQ resources as needed
- Perform any required enhancements to data

Role 3 - State Affiliate Field Partner(s) list all

Name(s):

- Coordinate/facilitate in-state acquisition plan
- Implement member recruitment program in state

Role 4 - State Affiliate Data Partner(s) list all

Name(s):

- Develop internal capacity to align state and local data to upload into database

Section 1: List & Data Acquisition Availability

1. **Does your state have the ability to gather full lists of employees within the bargaining unit?**
At what level are the lists gathered? *(check all that apply)*

State Local Worksite Other *(please elaborate):*

2. **At what level are the lists cleaned (updated, modified, records merged to upload into IMS)?** *(check all that apply)*

State Local Worksite Other *(please elaborate):*

3. **Which strategy(ies) are you using to gather the lists?** *(check all that apply)*

Policy Change:

Legislative Administrative Policy School Board

Negotiated Contract Language

Relational Request

As exclusive representative?

Public Data

FOIA

Other Information: *(please elaborate)*

4. **Is your affiliate collecting potential member data through other means?** *(check all examples that apply)*

Advocacy Petitions *(paper or virtual-Action Network, CapWiz, CQ, EveryAction)*

Virtual Event attendance/registration lists *(VAN or Mobilize events)*

In-person attendance/registration lists

Other Information: *(please elaborate)*

If so, have those lists of action takers been matched through Catalist to identify members and potential members?

Yes No Some of it Unsure Need support Other (please elaborate):

Section 2: Systems Management

5. Has someone in your affiliate been trained by NEA's Membership Management Services (MMS) team on use of the IMS Bulk Upload feature for member/potential member list entry?

Yes (please list all those trained): No Unsure Other (please elaborate):

6. What system(s) does state affiliate use to store and manage potential members?

If state is processing into 360 already, which type of records are they using? (check all that apply)

PM-1 (denotes Professional/Certified) PM-2 (denotes ESP) NM (denotes non-member) Other (please explain):

7. What are the current processes and tools the state uses to get member data into the system?

(Please provide as much detail as possible)

Step 1:

Step 2:

Step 3:

Section 3: Data Quality

8. **The NEA has developed standards to categorize our prospect data. Which of the following categories do most of your lists fall into?**

Category 1: Enough to identify potential members

(full work and contact info; could include job classification, worksite, phone number, email address, home address)

Category 2: Enough to identify leads

(name, worksite, NEA worksite and employer match, position)

Category 3: Incomplete data

(only name and worksite)

Other: *(please explain)*

9. **What data fields are most widely available to your affiliate?**

Section 4: Engagement Data Tracking

10. **What data system(s) are you currently using to track engagement with members and potential members:** *(check all that apply)*

Petitions/Advocacy? *EveryAction, Action Network, CapWiz*

Email: *Salesforce, MailChimp, Constant Contact*

New Educator 1:1 conversation cards

1:1 conversations

Event Attendance/Webinar Attendance

Digital 1:1 conversations: *VAN phonebank, Hustle*

Other *(please explain):*

11. **Where/how is the data above stored and is it linked to membership data?**

12. **Has the engagement data in legacy systems been appended to existing members and potential member records in 360 or VAN? This would include data in any system except EveryAction, such as Excel, MailChimp, etc.**



MEMBER AND POTENTIAL MEMBER UPLOAD PROCESS

OVERVIEW TO UPLOAD MEMBERS & POTENTIAL MEMBERS

Updated April 2021

Presented by: Doug Snow EDIS Manager

Presented by: Bob Burke EDIS Manager

MEMBER & POTENTIAL MEMBER DATA UPLOAD

Member and Potential Member Data Upload Setup

- The Member and Potential Member Data Upload Setup is used to configure the setups for different types of files received from various sources.
- The setups are referenced when uploading a file.
- The Member and Potential Member Data Upload Setup maps the columns in the worksheet to the database.

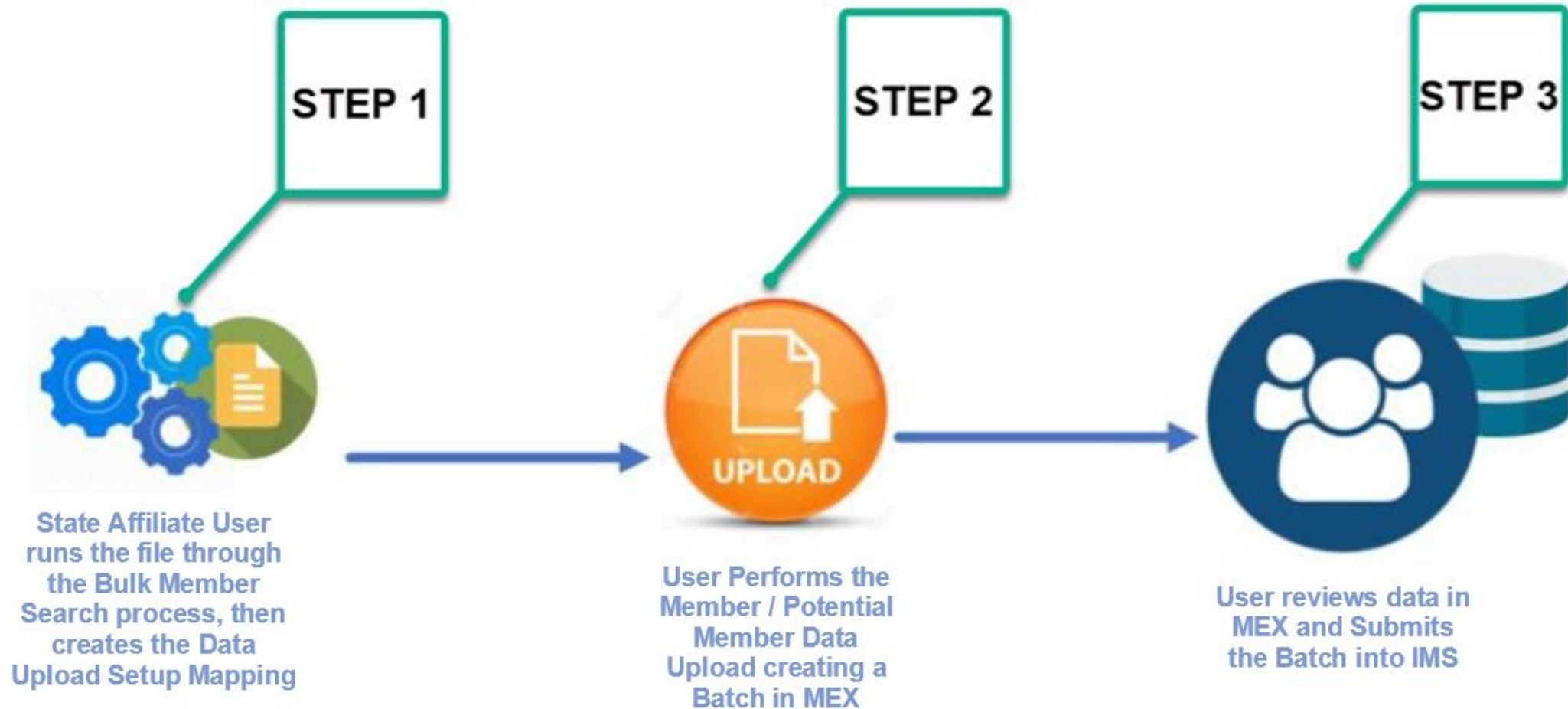
Bulk Member Search (File)

- Matches an external file with data in IMS/NEA360 and to identify existing members or potential members in the file.
- This feature pre-processes an input file to match data in the file to data in IMS/NEA360.
- Allows users to specify the search criteria.
- Data scrubbing process identifies individuals as members/ potential members for matches found in IMS/NEA360.
- This process eliminates uploading duplicate existing member/potential member data into the system.
- It is strongly advised to perform this pre-processing step prior to uploading members/potential members into the IMS/NEA360 system unless the file contains a unique identifier such as Individual ID, Alt ID or Employee ID.

Member and Potential Member Data Upload

- This process allows users to upload member data which includes personal data, membership data, and employment data into the IMS/NEA360 system.

3 STEP PROCESS TO UPLOAD MEMBERSHIP



Use Cases

USE CASE #1 – POTENTIAL MEMBER DATA UPLOAD WITH MINIMUM INFORMATION

File Columns >> First Name, Last Name, and Employer (User Id)

- We strongly recommend you provide Employer (User Id), along with the Worksite (User Id).
- The process will create a "Potential Member" record for this case.

USE CASE #2– POTENTIAL MEMBER DATA UPLOAD WITH CONTACT INFORMATION

File Columns >> First Name, Last Name, and Employer (User Id), Worksite (User Id) and/or additional personal contact details like phone, email, address

- The process will create a "Potential Member" record for this case.

Use Cases

USE CASE #3- NON-MEMBER DATA UPLOAD WITH MINIMUM INFORMATION

File Columns >> First Name, Last Name and add one or more personal contact information like phone and/or email and/or address.

- The process will create a "Non-Member" record for this case as the employment information is not available.

USE CASE #4– POTENTIAL MEMBER DATA UPLOAD WITH MEMBER TYPE

File Columns >> First Name, Last Name, Local User Id, Employer User Id, Home Address, Email, Membership Year, NEA and/or SEA Member Type.

- Set the NEA member type to PM-**-**
- This scenario will help you track and report the potential members using MRA reports.
- The process will create a "Potential Member" record for this case.

Create an Upload Setup, matching the data from the spreadsheet.

[nea](#)
[Individuals](#)
[MEX](#)
[FRS](#)
[eDues](#)
[Utilities](#)
[Reports & Extracts](#)
[Upload](#)
[Affiliates](#)
[Ext Org](#)
[RA Reg](#)

[Member & Potential Mbr Data Upload Setup](#)
[Hot News](#)
[Feedback](#)

Member & Potential Mbr Data Upload Setup

State Affiliate:

Column definition for Header ID #2965 Name :PM UPLOAD TEST - TEST UPLOAD OF POTENTIAL MEMBERS

| | | | A | B | C | D |
|--------|-------------------------|--------------------|------------|-----------|------------------|------------|
| Delete | Target Column Name | Source Column Name | FIRST NAME | LAST NAME | EMPLOYER USER ID | WL USER ID |
| | First Name | FIRST NAME | SUMMER | BREEZE | 4900030 | 1001 |
| | Last Name | LAST NAME | APRIL | RAINE | 4900030 | 3045 |
| | Employer ID (User) | EMPLOYER USER ID | BLUE | SKYZE | 4900030 | 1003 |
| | Work Location ID (User) | WL USER ID | RAINEY | DAYS | 4900210 | 3065 |
| | | | SUNNY | DAIZE | 4900210 | 1004 |
| | | | RAIN | DROPZE | 4900210 | 1004 |
| | | | BREEZY | DAYZE | 4900330 | 3008 |
| | | | STARRY | SKIES | 4900330 | 2006 |
| | | | SUNSHINE | WEEKS | 4900330 | 2006 |
| | | | RAINBOW | KNIGHTS | 4900330 | 2006 |

Once the data has been run through the Bulk Member Search process, the file may be used in the Upload Process.

Process Bulk Member Search

State Affiliate : UTAH SCHOOL EMPLOYEES ASSOCIATION ▼ Employer : ▼
Local Affiliate : ▼

New

Select File : No file chosen

Search

Batch Id : Batch Status : ▼

Rows : 1

| Batch Id | Org File Name | Processed File | Batch Date | Batch Status | Created By | Rows | Comments |
|----------|---------------------------------------|--------------------------|---------------------|--------------|------------|------|-------------------------------------|
| 51771 | TEST UPLOAD OF POTENTIAL MEMBERS.xlsx | Download | 2020-04-22 17:15:25 | Completed | MEMDLW | 9 | Searched 9 out of 9 StartTm:05:15:2 |

Once the data is Uploaded correctly, a Batch is created to our IMS > MEX Module.

The data in the Batch may be reviewed and verified one more time before the uploaded data is submitted into the IMS database. This data will then flow into the NEA360 and then to the VAN.

The screenshot displays the NEA MEX module interface. The top navigation bar includes 'Individuals', 'MEX', 'FRS', 'eDues', 'Utilities', 'Reports & Extracts', 'Upload', 'Affiliates', 'Ext Org', and 'RA Reg'. The 'MEX' tab is highlighted. Below the navigation bar, there are links for 'Hot News' and 'Feedback', and the version 'MEMDLW (QA) 1.4.1.x'.

The main section is titled 'Batch Search'. It contains several search criteria fields:

- State Affiliate: UTAH SCHOOL EMPLOYEES ASSOCIATION (highlighted with a red box)
- Local: Select All
- Chapter: Select All
- Batch #: (empty)
- Batch Date: (empty)
- Txn #: = (dropdown)
- Status: Select All
- Process Date: (empty)
- External:
- Source: UES-1224246-S
- Batch Type: (empty)
- Locked:

Below the search criteria are buttons for 'Rejected Txn', 'Search', 'New', and 'Reset'. The 'Rejected Txn' button has two red arrows pointing to it.

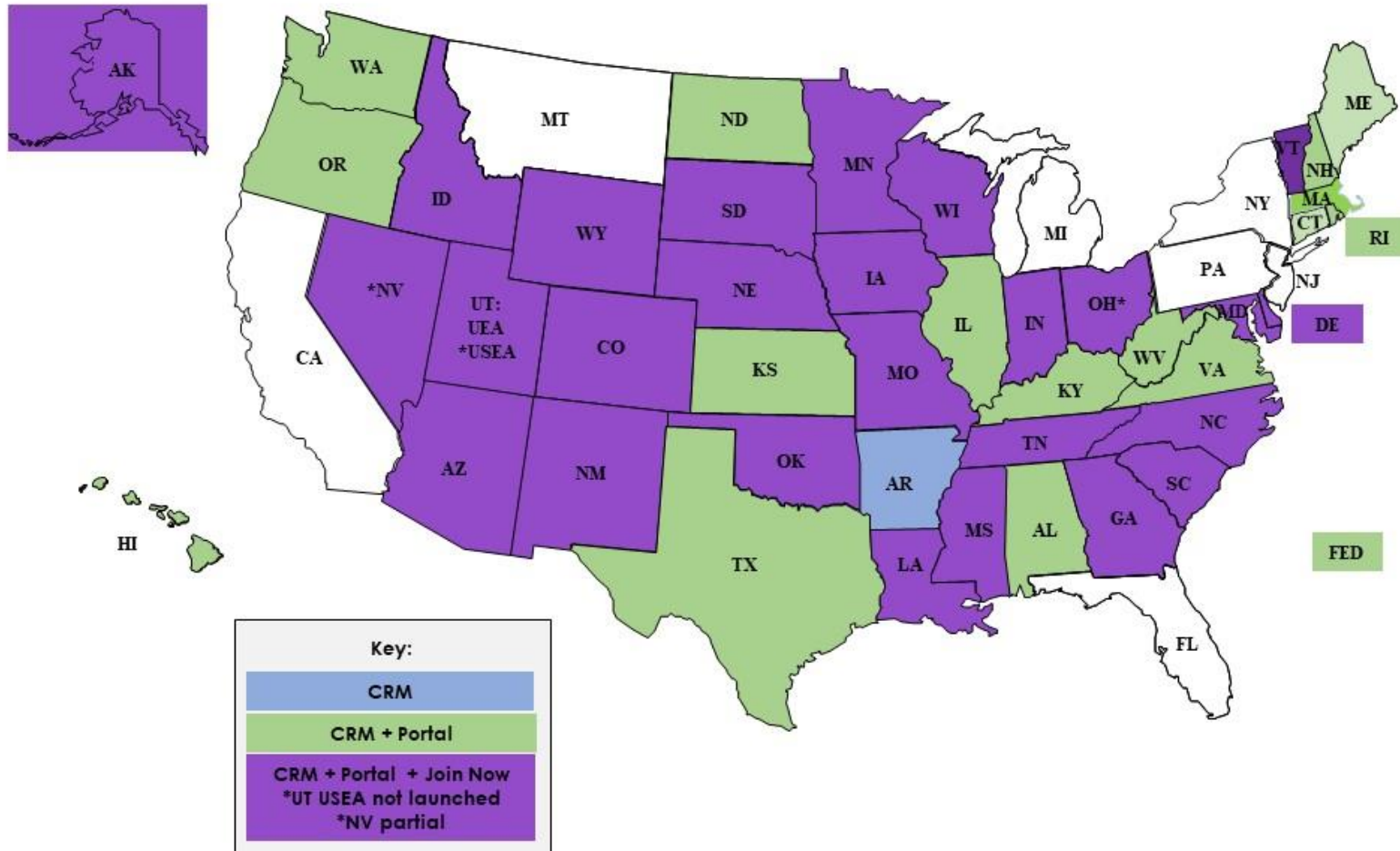
The results section shows 'No Record Found' in red text. Below this is a table with the following columns: Batch #, Batch Date, State, Local, Chapter, Status, # of Txns, Source, Process Date, Txns, Edit, Batch Type, and Comments.

| Batch # | Batch Date | State | Local | Chapter | Status | # of Txns | Source | Process Date | Txns | Edit | Batch Type | Comments |
|---------|------------|-------|-------|---------|--------|-----------|---------------|--------------|----------------------|----------------------|------------|----------|
| 1122682 | 04/22/2020 | UES | | | PEND | 10 | UES-1224246-S | | Txns | Edit | External | Standard |

On the right side of the table, there is a 'Transactions' menu with the following options: Post, Post All, Un Post, Submit, Counts, Delete, and Unlock.

Join Now Potential Member Bulk Upload

Affiliate Launch Map (as of 4.12.21)



Launch Counts:

- 45 of 47 launched
- 42 of 45 CRM and Member Portal
- 25 of 45 CRM, Member Portal, Join Now

5 IPS States:
CA, MI, NJ, NY, PA



ISEA LOCAL BARGAINING UNIT LISTS

1. ACQUISITION
2. PROCESSING
3. USE

LIST ACQUISITION

- ISEA UniServ staff send requests to each employer in June
- Support from Iowa Public Employment Relations Board for right to lists
- Request includes specific excel format including all contact information and licensure folder number (for certified staff)
- Follow up throughout the summer along with assistance from local leaders in places where requests are ignored

LIST ACQUISITION

- Bargaining Unit List Template:

The screenshot displays the Microsoft Excel interface with the following details:

- Title Bar:** Bargaining Unit List Template.xlsx - Microsoft Excel
- File Tab:** Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, PowerPivot, Load Test, Team
- Home Tab Ribbon:**
 - Clipboard:** Paste
 - Font:** Calibri, 11, Bold (B), Italic (I), Underline (U), Text Color, Background Color
 - Alignment:** Wrap Text, Merge & Center
 - Number:** General, Currency (\$), Percentage (%), Decimals (0.00)
 - Styles:** Conditional Formatting, Format as Table, Cell Styles
 - Cells:** Insert, Delete, Format
 - Editing:** AutoSum, Fill, Clear, Sort & Filter, Find & Select
- Formula Bar:** =Last Name
- Worksheet Grid:**

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P |
|----|-----------|------------|-------------|-------------|-----------|------------|----------|-----------|-----------|------------|------------|--------------------|----------|----------|-----------|---|
| 1 | Last Name | First Name | Addr Line 1 | Addr Line 2 | Home City | Home State | Home Zip | WorkEmail | HomeEmail | Cell Phone | Home Phone | BOEE Folder Number | Position | Worksite | Hire Date | |
| 2 | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | | | | | |
| 14 | | | | | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | | | | | |
- Sheet Tab:** Sheet1, Sheet2, Sheet3
- Status Bar:** Ready, 100%

LIST PROCESSING

- UniServ staff check lists for correct format, edit as needed and upload list in folder on ISEA internal network
- Membership data is imported daily from NEA360 to ISEA Research (internal network database system)
- Lists are uploaded to ISEA Research and are checked against membership data using 2 methods
 - Certified staff – licensure folder numbers – folder number is a custom field in NEA360
 - ESP – first name, last name, and zip code
 - Match = Member; No Match = Potential Member

LIST PROCESSING

- NEA360 – Custom field for Folder Number

| State Specific Field Assignments | | New State Specific Field Assignment |
|----------------------------------|------------|-------------------------------------|
| Action | Field Name | Value |
| Edit | Folder # | 236701 |

LIST USE

- Transfer of membership for members who moved locals from the past school year
- Local membership reports are now provided on a weekly basis to all local presidents and membership chairs (and others like member organizers)
- Provides us more accurate statewide and local data on new hire recruitment
- ISEA organizing app allows locals to track data on membership and organizing conversations

LIST USE – LOCAL MEMBERSHIP REPORT (PAGE 1)

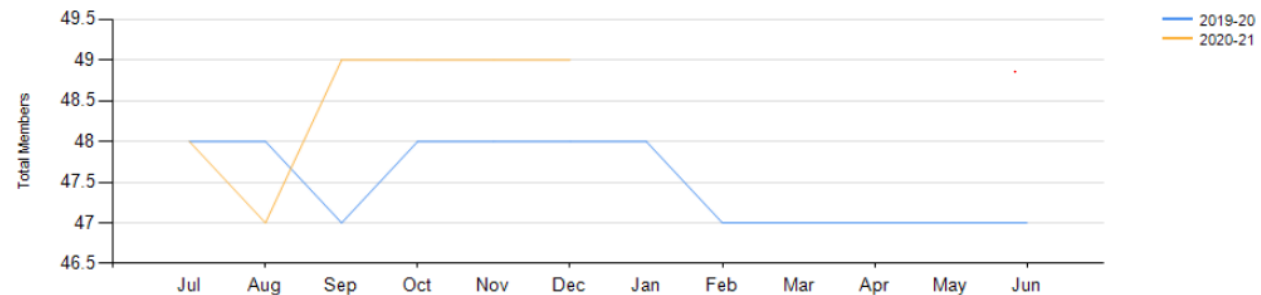


Local Membership
Adel-Desoto-Minburn EA for 2020-21
Executed at 12/9/2020 9:26:29 AM

| | Current Week (12/4/2020) | Last Week (11/27/2020) |
|-------------------------------------|-----------------------------|---------------------------|
| Total Members | 49 | 49 |
| Potential Members | 100 | 100 |
| Employees in Bargaining Unit | 149 | 149 |
| % Membership | 32.89% | 32.89% |

Weekly Gain/Loss:

Yearly Membership Trend



LIST USE – LOCAL MEMBERSHIP REPORT (PAGE 2)



Local Membership
Adel-Desoto-Minburn EA for 2020-21
Executed at 12/9/2020 9:31:05 AM

Potential Members

| Last Name | First Name | Home Email | Work Email | Cell Phone | Home Phone | Building Name | New Hire | Canceled in Past Week |
|-----------|------------|------------|-------------------------|----------------|------------|----------------------------|----------|-----------------------|
| Allbee | Devon | | dallbee@adm.k12.ia.us | (515) 943-0671 | | ADM Senior High School | | |
| Anderson | Elizabeth | | landerson@adm.k12.ia.us | (515) 350-8984 | | Adel Elementary School | X | |
| Ashby | Taylor | | tashby@adm.k12.ia.us | (515) 480-0616 | | DeSoto Intermediate School | | |
| Austin | Carrie | | caustin@adm.k12.ia.us | (515) 508-1810 | | DeSoto Intermediate School | | |
| Baier | Jodi | | jbaier@adm.k12.ia.us | (515) 238-9149 | | ADM Senior High School | | |
| Banks | Tiffany | | tbanks@adm.k12.ia.us | (563) 299-7363 | | Adel Elementary School | | |
| Barnett | Carol | | cbarnett@adm.k12.ia.us | (515) 778-5724 | | DeSoto Intermediate School | | |
| Bedard | Emma | | ebedard@adm.k12.ia.us | (928) 499-2868 | | ADM Senior High School | | |
| Blair | Jo Lynn | | jblair@adm.k12.ia.us | (515) 720-3202 | | Adel Elementary School | | |
| Braun | Russell | | rbraun@adm.k12.ia.us | (515) 975-5079 | | ADM Senior High School | | |
| Brown | Steve | | sbrown@adm.k12.ia.us | (515) 745-7374 | | ADM Middle School | | |
| Bryte | Kinzee | | kbryte@adm.k12.ia.us | (515) 321-4422 | | Adel Elementary School | | |
| Campbell | Kristen | | kcampbell@adm.k12.ia.us | (515) 681-6617 | | Adel Elementary School | | |
| Carlson | Cindy | | ccarlson@adm.k12.ia.us | (515) 669-8999 | | Adel Elementary School | | |
| Carter | Garrison | | gcarter@adm.k12.ia.us | (641) 895-9643 | | ADM Senior High School | | |
| Carter | Jessica | | jcarter@adm.k12.ia.us | (641) 247-9639 | | Adel Elementary School | | |

LIST USE – LOCAL MEMBERSHIP REPORT (PAGE 3)



Local Membership
Adel-Desoto-Minburn EA for 2020-21
Executed at 12/9/2020 9:31:05 AM

Members

| Last Name | First Name | Home Email | Work Email | Cell Phone | Home Phone | Building Name | New Hire | Joined in Past Week |
|-----------|------------|------------------------------|--------------------------|----------------|----------------|---------------------|----------|---------------------|
| Alliman | Leah | kalliman@gmail.com | | (319) 931-4606 | (319) 931-4606 | Adm Middle | | |
| Basinger | Elizabeth | 6basingers@gmail.com | bbasinger@adm.k12.ia.us | (319) 310-1566 | | Adm High | | |
| Boesen | Sarah | boesen.sarah@gmail.com | sboesen@adm.k12.ia.us | | (515) 205-6344 | Adm Middle | | |
| Boston | Lori | sell.boston@hotmail.com | lboston@adm.k12.ia.us | (515) 321-6731 | | Adm Middle | | |
| Clowser | Jane | jane.clowser@gmail.com | jclowser@adm.k12.ia.us | (515) 988-6800 | | Adm Middle | | |
| Feltes | Benjamin | feltes.ben@gmail.com | bfeltes@adm.k12.ia.us | | (319) 210-8255 | Adm Middle | | |
| Freidhof | Jeffrey | jbfreidhof@gmail.com | jfreidhof@adm.k12.ia.us | (563) 380-2735 | (563) 380-2735 | Adm Middle | | |
| Gettler | McKenzie | mckgettler@gmail.com | | (641) 740-0678 | (641) 740-0678 | Adm High | | |
| Gilliland | Angela | littlegilli@msn.com | agilliland@adm.k12.ia.us | (515) 210-7207 | | Adm High | | |
| Grimskas | Michelle | michelle.grimoskas@gmail.com | | (319) 239-8564 | | Desoto Intermediate | | |
| Heitz | Ann | heitzthreeboys@hotmail.com | aheltz@adm.k12.ia.us | (515) 249-5129 | (515) 993-5327 | Adm Middle | | |
| Hoben | Jennifer | biljenhoben@hotmail.com | | (765) 490-9636 | (515) 834-9188 | Adm Middle | | |
| Howell | Sarah | howell.sarah10@gmail.com | showell@adm.k12.ia.us | (515) 720-4635 | | Desoto Intermediate | | |
| Huston | Sara | huston.sara7@gmail.com | shuston@adm.k12.ia.us | (515) 669-1778 | | Adm Middle | | |
| Jennison | Natalie | nmjennison@gmail.com | | (319) 750-6378 | | Adm High | | |
| Jobst | Emily | emilyannjobst_22@hotmail.com | ejobst@admschools.org | (712) 260-4767 | | | | |
| Kilker | Jason | kilkerj@gmail.com | jkilker@adm.k12.ia.us | (515) 249-9206 | (515) 993-4101 | Adm Middle | | |
| Knipner | Elizabeth | betknipner@gmail.com | bknipner@adm.k12.ia.us | (515) 822-2456 | | Adm High | | |

LIST USE – ISEA ORGANIZING MOBILE SITE

9:43 LTE 29%

iseavotesite.org/organizing

ISEA
Iowa State Education Association

ISEA Organizing

Log In

First Name

Last Name

Zip Code (5 digits)

Last 4 SSN or PIN

Log In

9:43 LTE 29%

iseavotesite.org/organizing

ISEA
Iowa State Education Association

ISEA Organizing

Welcome Adam McDermott! [Log Out](#)

Campaign: 2020 Back to School Membership Outreach

Local: Adel-Desoto-Minburn EA

Building: ** All Buildings **

Employee: --Select an employee--

- (M) Member
- (P) Potential Member
- (N) New Hire
- (x) Script Completed
- (*) Called/No Contact

9:43 LTE 29%

-- Select an employee --

- Allbee, Devon (P)
- Alliman, Leah (M)
- Anderson, Elizabeth (P)
- Ashby, Taylor (P)
- Austin, Carrie (P)
- Baier, Jodi (P)
- Banks, Tiffany (P)
- Barnett, Carol (P)
- Basinger, Elizabeth (M)
- Bedard, Emma (P)

9:44 LTE 29%

Campaign: 2020 Back to School Membership Outreach

Local: Adel-Desoto-Minburn EA

Building: ** All Buildings **

Employee: Allbee, Devon (P)

- (M) Member
- (P) Potential Member
- (N) New Hire
- (x) Script Completed
- (*) Called/No Contact

Contact Info **Script**

(only potential member data can be updated)

PHONE

Cell Phone: (515) 943-0671

Home Phone:

Work Phone:

EMAIL

Home Email:

Work Email: dalbee@adm.k12.ia.us

ADDRESS

Address 1: 1460 SE Bishop Dr #110

Address 2: (apt, unit, etc.)

City: Waukee

State: Iowa

Zip: 50263

Save

9:44 LTE 29%

Campaign: 2020 Back to School Membership Outreach

Local: Adel-Desoto-Minburn EA

Building: ** All Buildings **

Employee: Allbee, Devon (P)

- (M) Member
- (P) Potential Member
- (N) New Hire
- (x) Script Completed
- (*) Called/No Contact

Contact Info **Script**

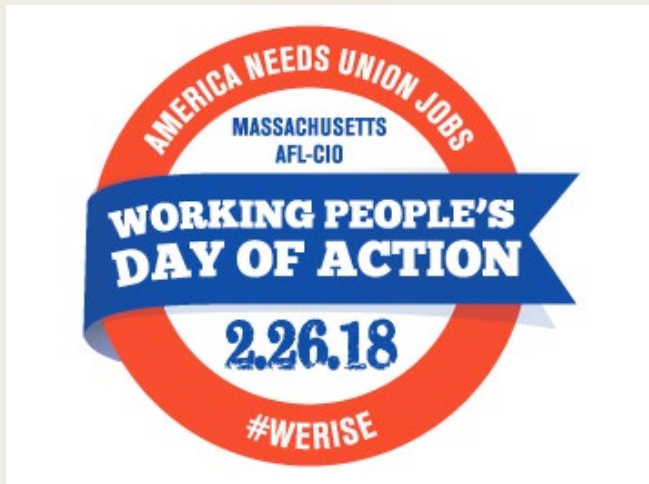
What date did you attempt to contact the employee?

Submit

Massachusetts: MTA All In Campaign



- Focused on acquiring lists in response to *Friedrichs* and *Janus*
- Made lists acquisition as key part of broader Organizing Campaign: MTA All In Campaign
- Created Summer Member Organizing Program with support from NEA
- Partnered with MA AFL-CIO Public Sector Task Force. Forums, Toolkit, etc.
- Organized and fought for passage of *Freedom to Join Act* (Sept. 19, 2019)



List Acquisition: Getting the lists from employers



- Get Buy-in from locals. Field rep conversations with local presidents and local executive boards. Regional field manager support is critical.
- Field reps work with locals to submit MGL Ch. 150e list request to employer.
- Locals provided templates: request letter and excel spreadsheet template.
- Local send requests or can opt to have the field rep send on their behalf.
- Employer given instructions to send lists to lists@massteacher.org.



Centralized List Processing and Protocols



- Support Staff compile lists in SharePoint.
- Training provided to support staff and regular team check-ins are held.
- Support staff run lists through comparison module: IMS Bulk Uploader
- Support Staff identify potential members, active members and bargaining unit list discrepancies.



List Distribution

- Local treasurer and/or, presidents, and field reps provided “potential member” lists by support staff.
- Locals asked to review lists and send roster updates to MTA Membership division:
membership@massteacher.org
- Field reps and organizers identify locals that require additional support for membership drives: Cape Code local case study.

The background features a dark blue gradient with a subtle pattern of white dots. On the left side, there are several overlapping circular elements. A prominent one is a large circle with a scale around its perimeter, marked with numbers from 140 to 260 in increments of 10. Other circles include dashed lines, solid lines, and arrows, some pointing inward and some outward, creating a sense of motion and organization.

MEMBERSHIP ORGANIZING COMMITTEE MEETING

DECEMBER 9, 2020
6-8:30 PM EST

NATIVE LAND ACKNOWLEDGEMENT

JULIE HYNDMAN

We begin as we do every meeting by acknowledging that we meet on the traditional lands of the diverse native peoples upon which the participants of this call reside and work, including the _____ peoples, upon whose land I join you from today in _____. We honor America's First People and all elders, past, present, and emerging, and we are called to learn, and share what we learn, about the tribal history, culture, and contributions that have been suppressed in telling the story of America.

WELCOME & INTRODUCTIONS

- Name
- State and Local
- Education Position
- Your Principal is actually a witch! One day, she gets tired of you not paying attention and *zaps* you into a novel. Which novel would you hope she zapped you into and why?

LOGISTICS & NORMS

- Logistics
- Norms from last year
 - Be Present
 - Participate
 - Be respectful of others
 - Assume positive intent
 - Step up, step back
 - Keep community and self-care in mind
 - All ideas should be considered (unless rooted in the oppression of others)
 - Have your racial justice lens in place
- NEA Standards of Conduct
 - Respect others and their views;
 - Recognize and value individual differences;
 - Promote mutual respect, understanding and cooperation as the basis of interactions amongst participants in NEA activities, events or meetings;
 - Maintain the reputation of NEA by conducting themselves in accordance with high standards of professionalism.

MEMBERSHIP ORGANIZING COMMITTEE AGENDA

- Review MOC Charges (Nick Sirek)
- Speakers
 - NEA Friends from OGC, EDIS, MMS
 - State Affiliate from:
 - ISEA
 - MTA
- Discussion Intro (Nick Sirek)
- Action Items & Deliverables (Nick Sirek, Matt Bennet, Peter Witzler)
 - “Homework”

Table of Contents

| | |
|--|----|
| Introduction: Why is it Important to Have Good Lists? | 2 |
| Model List Acquisition Processes | 4 |
| Opportunity 1: Policy Change | 5 |
| Opportunity 2: Negotiated Language | 6 |
| Opportunity 3: Relational Information Request | 8 |
| Opportunity 4: Utilize Publicly Available Data | 8 |
| Opportunity 5: Freedom of Information Act (FOIA) Request | 9 |
| Appendix A: Florida Education Association Model List Acquisition Process | 10 |
| Appendix B: State Laws Supporting Effective Union Representation <i>(As of 12/2019)</i> | 11 |
| Appendix C: Sample FOIA Letter | 15 |
| Appendix D: Sample Relational Request Letters <i>(Exclusive Representative & Not Exclusive Representative)</i> | 16 |

The National Education Association (NEA), the nation's largest professional employee organization, is committed to advancing the cause of public education. NEA's three million members work at every level of education – from pre-school to university graduate programs. NEA has affiliate organizations in every state and in more than 14,000 communities across the United States.

Who to Contact:

Year-Round Organizing: neweducator@nea.org

Data and Analytics: datash@nea.org

Collective Bargaining and Member Advocacy: collectivebargaining@nea.org

Our Leadership:

Lily Eskelsen Garcia, NEA President

Rebecca Pringle, NEA Vice President

Princess R. Moss, NEA Secretary-Treasurer

Kim A. Anderson, NEA Executive Director

NEA Executive Committee:

Eric R. Brown, Illinois

Shelly Moore Krajacic, Wisconsin

Robert Rodriguez, California

Christine Sampson-Clark, New Jersey

George Sheridan, California

Hanna Vaandering, Oregon

www.nea.org/newed | NewEducator@nea.org

STRATEGIES FOR LIST ACQUISITION

1. Policy Change
2. Negotiated Language
3. Relational Information Request
4. Utilize Publicly Available Data
5. FOIA Request

Toolkit available at: NEA.org/NewEdResources

WHICH DATA FIELDS ARE MOST IMPORTANT?

Basic Identification

- First name
- Last name
- Employee ID number
- Home address
- Home telephone number
- Personal cell phone number
- Personal email address

Worksite Information

- Employer
- Work location
- Job title
- Current assignment
- Work phone number
- Work email address
- Date of hire

Opportunity 1: Policy Change

Policy change can be achieved at the state level through legislation or administrative/executive action, or at the local level through school board policy changes or local ordinances.

- ▶ **STATE LEGISLATION:** State legislation is an important way to secure access to data on the educators we represent. Armed with statutory language, we can bargain stronger contracts and secure regular access to information without frequent requests.
- ▶ **STATE ADMINISTRATIVE POLICY OR EXECUTIVE ACTION:** Working with the governor and within the relevant state departments (*ex. Education, Labor*), states have secured policy changes that support access to data on the educators we represent.
- ▶ **SCHOOL BOARD POLICY:** Without action taken at the statewide level through legislation or administrative action, Local Associations may secure policy at the school board level to secure access to data on the educators we represent.

OPPORTUNITY 2: NEGOTIATED LANGUAGE

- **Section 1.** At the beginning of each contract year, and at least every 120 days thereafter, the Employer shall supply the Union with the following information for each employee:
 - name, home address, telephone number, cell phone number, and email address;
 - employee identification number;
 - most recent date of hire and seniority date(s), if different;
 - job title, current assignment, work location, work telephone number, and work email address; and
 - salary and/or any other form of compensation.

OPPORTUNITY 2: NEGOTIATED LANGUAGE

Section 2. At the beginning of each contract year, and at least every 120 days thereafter, the Employer shall supply the Union with the following information for each employee:

- new hires, resignations, retirements, long-term unpaid leaves of absence, dismissals, and/or any other separations from employment; and
- any other changes in the information specified in Section 1 and the effective date of such changes.
- **Section 3.** The Employer shall furnish the Union with the information specified in Section 1 for each new employee within one week after his/her date of hire.
- ***For further examples, contact NEA Collective Bargaining and Member Advocacy: collectivebargaining@nea.org***

OPPORTUNITY 3: RELATIONAL INFORMATION REQUEST

- Exclusive representative:

Dear <DISTRICT SUPERINTENDENT/CONTACT>,

As the exclusive representative for the <INSERT UNIT DESCRIPTION > unit, the Association has an obligation to represent all the employees in the unit. Therefore, in order to fulfill that obligation, we are requesting the following information about the employees in the unit.

We are requesting that the data be provided electronically, in Excel format, with the following fields:

First name

Last name

- Not exclusive representative

Dear <DISTRICT SUPERINTENDENT/CONTACT>,

As we move into the new school year, we hope to continue building on our partnership in the pursuit of excellent public education in <District Name>. We share with you a deep commitment to advocating for our schools and our students.

We are writing to request an electronic list of the employees in the <INSERT UNIT DESCRIPTION >, so that we may reach out to them to ensure that they continue to be informed and effective ambassadors and advocates for our schools and our students.

We are requesting that the data be provided electronically, in Excel format, with the following fields:

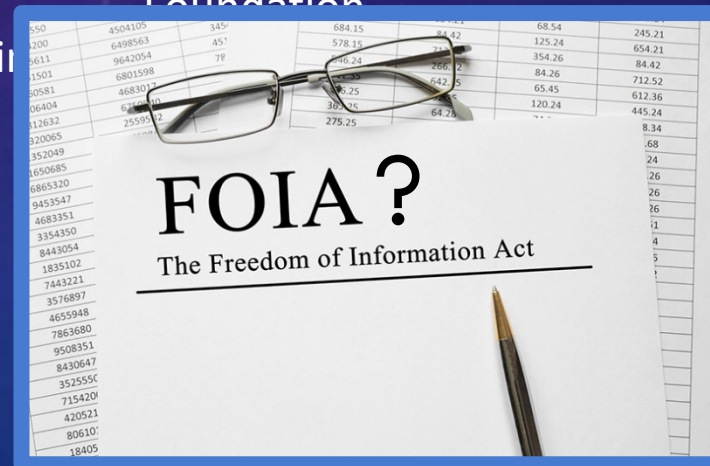
OPPORTUNITY 4 & 5: UTILIZE PUBLICLY AVAILABLE DATA, FOIA REQUESTS

Sources

- Licensing Data
- State Retirement Database
- K-12 School Websites
- Higher Ed Course Schedules and Faculty Lists

Drawbacks

- Limited information for matching
- If we can get the data, so can Freedom Foundation



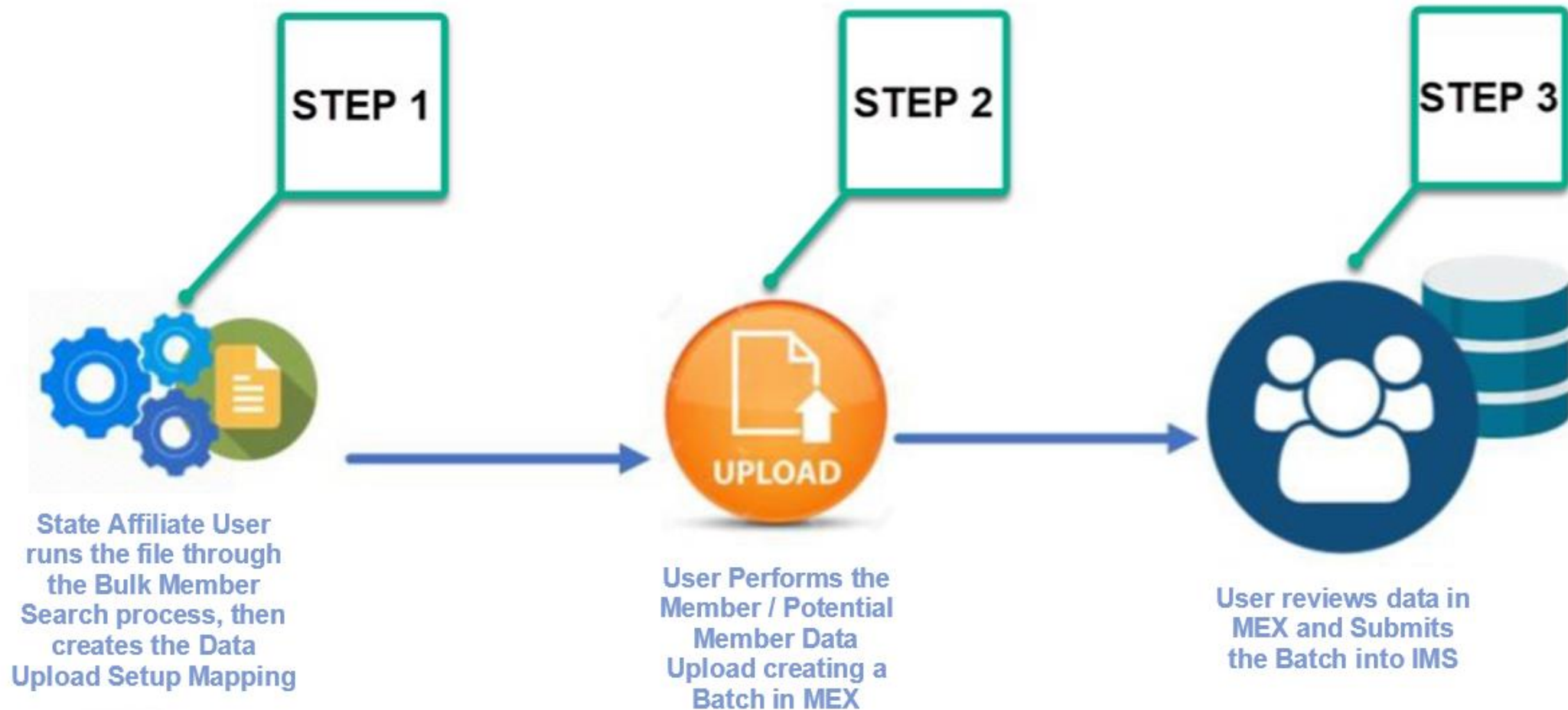
BUILDING LISTS WITH ADVOCACY

- NCAE Petition on Safe Re-opening of Schools

- Petition on Action Network
- Collected Personal Email, Cell and Employer
- Membership Ask Via Hustle
- Hot List Phone Banks of all who engaged
- SUPER METRIC: 190 Members Recruited



3 STEP PROCESS TO UPLOAD MEMBERSHIP

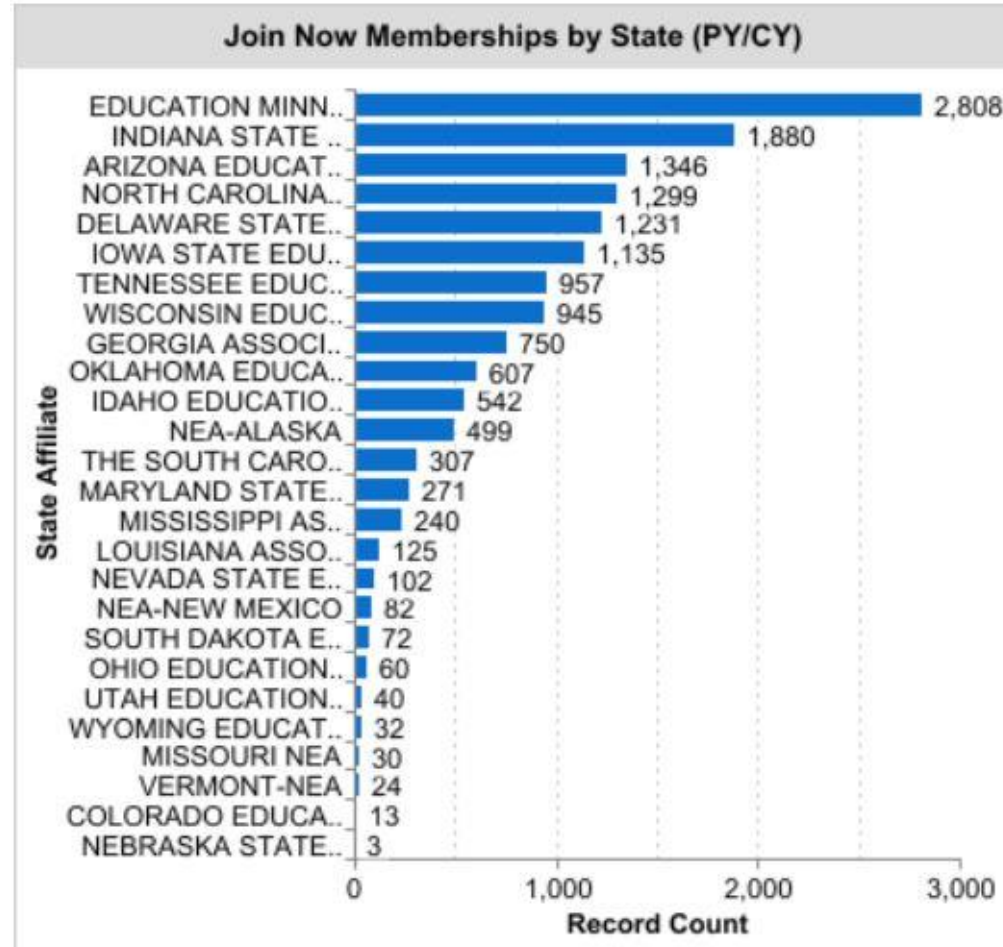


Join Now Potential Member Bulk Upload

The focus with Join Now launched states has been to help them establish best practices for potential member bulk uploads into IMS

Some examples:

- MN uses bulk uploads for PM lists but also uses other methods
- IN works local-by-local to send bargaining unit membership lists to state membership processors who match, clean, prep and enter into IMS
- CO is good example of a large urban pilot project loading PM lists into IMS
- VT has a process of acquiring lists after new law passed. They use business work-flows for bulk uploads into IMS expand with Join Now.



Join Now Memberships

| | |
|-------------------------------------|---------------|
| Total CY / PY Join Now Memberships: | 15,350 |
| Total CY Join Now Memberships: | 2,491 |

*JN numbers as of 4.12.21

Use Cases

USE CASE #1 – POTENTIAL MEMBER DATA UPLOAD WITH MINIMUM INFORMATION

File Columns >> First Name, Last Name, and Employer (User Id)

- We strongly recommend you provide Employer (User Id), along with the Worksite (User Id).
- The process will create a "Potential Member" record for this case.

USE CASE #2– POTENTIAL MEMBER DATA UPLOAD WITH CONTACT INFORMATION

File Columns >> First Name, Last Name, and Employer (User Id), Worksite (User Id) and/or additional personal contact details like phone, email, address

- The process will create a "Potential Member" record for this case.

Use Cases

USE CASE #3- NON-MEMBER DATA UPLOAD WITH MINIMUM INFORMATION

File Columns >> First Name, Last Name and add one or more personal contact information like phone and/or email and/or address.

- The process will create a "Non-Member" record for this case as the employment information is not available.

USE CASE #4– POTENTIAL MEMBER DATA UPLOAD WITH MEMBER TYPE

File Columns >> First Name, Last Name, Local User Id, Employer User Id, Home Address, Email, Membership Year, NEA and/or SEA Member Type.

- Set the NEA member type to PM-**-**
- This scenario will help you track and report the potential members using MRA reports.
- The process will create a "Potential Member" record for this case.

Create an Upload Setup, matching the data from the spreadsheet.

nea Individuals MEX FRS eDues Utilities Reports & Extracts Upload Affiliates Ext Org RA Reg

Member & Potential Mbr Data Upload Setup Hot News Feedback MEM

Member & Potential Mbr Data Upload Setup

State Affiliate: UTAH SCHOOL EMPLOYEES ASSOCIATION Search

Column definition for Header ID #2965 Name :PM UPLOAD TEST - TEST UPLOAD OF POTENTIAL MEMBERS

| Delete | Target Column Name | Source Column Name | A | B | C | D |
|--------|-------------------------|--------------------|-------------------|------------------|-------------------------|-------------------|
| | First Name | FIRST NAME | FIRST NAME | LAST NAME | EMPLOYER USER ID | WL USER ID |
| | Last Name | LAST NAME | SUMMER | BREEZE | 4900030 | 1001 |
| | Employer ID (User) | EMPLOYER USER ID | APRIL | RAINE | 4900030 | 3045 |
| | Work Location ID (User) | WL USER ID | BLUE | SKYZE | 4900030 | 1003 |
| | | | RAINEY | DAYS | 4900210 | 3065 |
| | | | SUNNY | DAIZE | 4900210 | 1004 |
| | | | RAIN | DROPZE | 4900210 | 1004 |
| | | | BREEZY | DAYZE | 4900330 | 3008 |
| | | | STARRY | SKIES | 4900330 | 2006 |
| | | | SUNSHINE | WEEKS | 4900330 | 2006 |
| | | | RAINBOW | KNIGHTS | 4900330 | 2006 |

Once the data has been run through the Bulk Member Search process, the file may be used in the Upload Process.

Process Bulk Member Search

State Affiliate : UTAH SCHOOL EMPLOYEES ASSOCIATION ▼ Employer : ▼
Local Affiliate : ▼

New

Select File : No file chosen

Search

Batch Id : Batch Status : ▼

Rows : 1

| Batch Id | Org File Name | Processed File | Batch Date | Batch Status | Created By | Rows | Comments |
|----------|---------------------------------------|--------------------------|---------------------|--------------|------------|------|-------------------------------------|
| 51771 | TEST UPLOAD OF POTENTIAL MEMBERS.xlsx | Download | 2020-04-22 17:15:25 | Completed | MEMDLW | 9 | Searched 9 out of 9 StartTm:05:15:2 |

Once the data is Uploaded correctly, a Batch is created to our IMS > MEX Module.

The data in the Batch may be reviewed and verified one more time before the uploaded data is submitted into the IMS database. This data will then flow into the NEA360 and then to the VAN.

The screenshot displays the NEA MEX module interface. The top navigation bar includes 'Individuals', 'MEX', 'FRS', 'eDues', 'Utilities', 'Reports & Extracts', 'Upload', 'Affiliates', 'Ext Org', and 'RA Reg'. The 'MEX' tab is highlighted. Below the navigation bar, there are links for 'Hot News' and 'Feedback', and the version 'MEMDLW (QA) 1.4.1.x'.

The main section is titled 'Batch Search'. It contains several search criteria fields:

- State Affiliate: UTAH SCHOOL EMPLOYEES ASSOCIATION (highlighted with a red box)
- Local: Select All
- Chapter: Select All
- Batch #: [Empty]
- Batch Date: [Empty]
- Txn #: = [Empty]
- Status: Select All
- Process Date: [Empty]
- External:
- Source: UES-1224246-S
- Batch Type: [Empty]
- Locked:

Below the search criteria are buttons for 'Rejected Txn', 'Search', 'New', and 'Reset'. The 'Rejected Txn' button has two red arrows pointing to it.

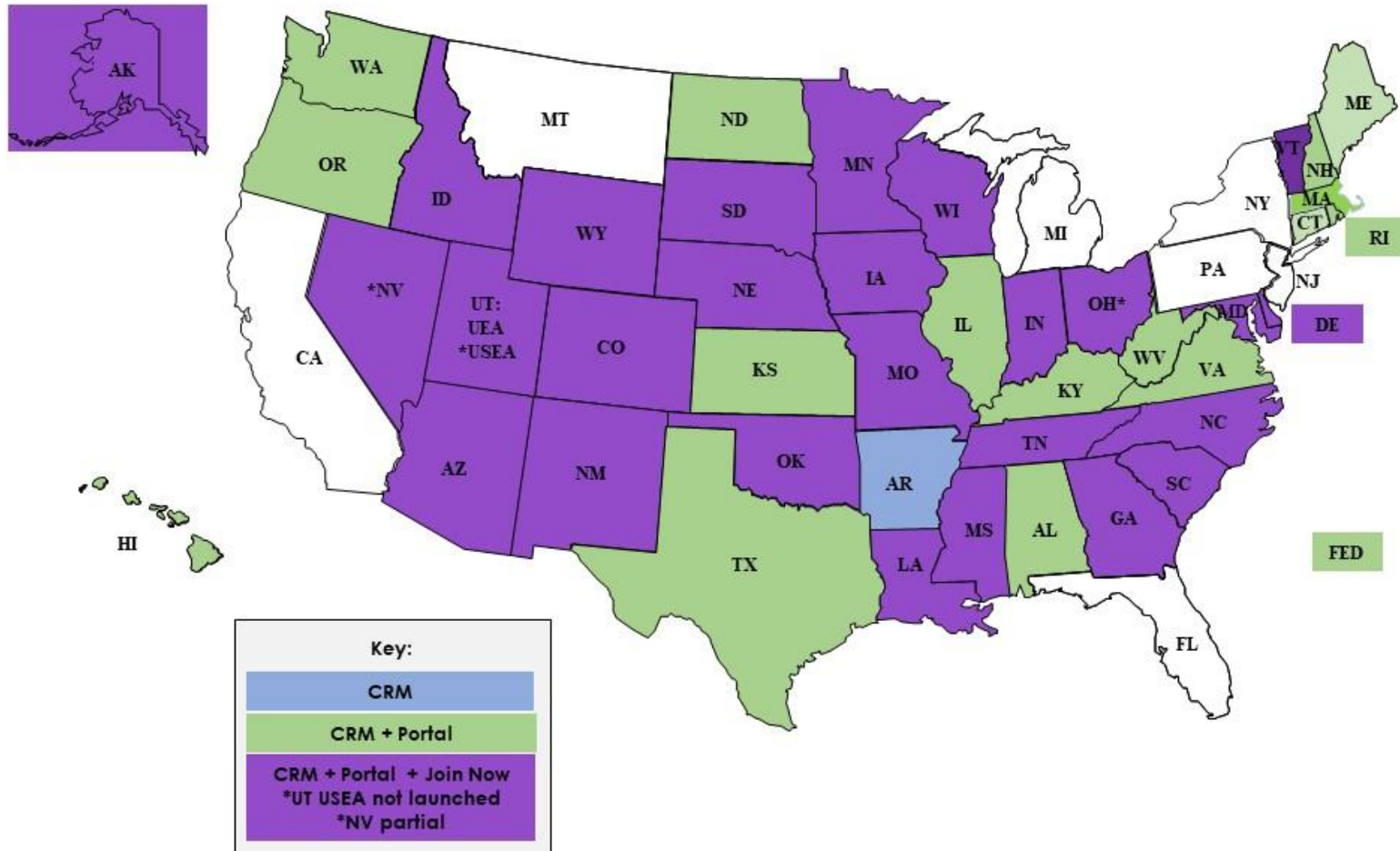
The results section shows 'No Record Found' in red text. Below this is a table with the following columns: Batch #, Batch Date, State, Local, Chapter, Status, # of Txns, Source, Process Date, Txns, Edit, Batch Type, and Comments.

| Batch # | Batch Date | State | Local | Chapter | Status | # of Txns | Source | Process Date | Txns | Edit | Batch Type | Comments |
|---------|------------|-------|-------|---------|--------|-----------|---------------|--------------|----------------------|----------------------|------------|----------|
| 1122682 | 04/22/2020 | UES | | | PEND | 10 | UES-1224246-S | | Txns | Edit | External | Standard |

On the right side of the table, there is a 'Transactions' menu with the following options: Post, Post All, Un Post, Submit, Counts, Delete, and Unlock.

Join Now Potential Member Bulk Upload

Affiliate Launch Map
(as of 4.12.21)



Launch Counts:

- 45 of 47 launched
- 42 of 45 CRM and Member Portal
- 25 of 45 CRM, Member Portal, Join Now

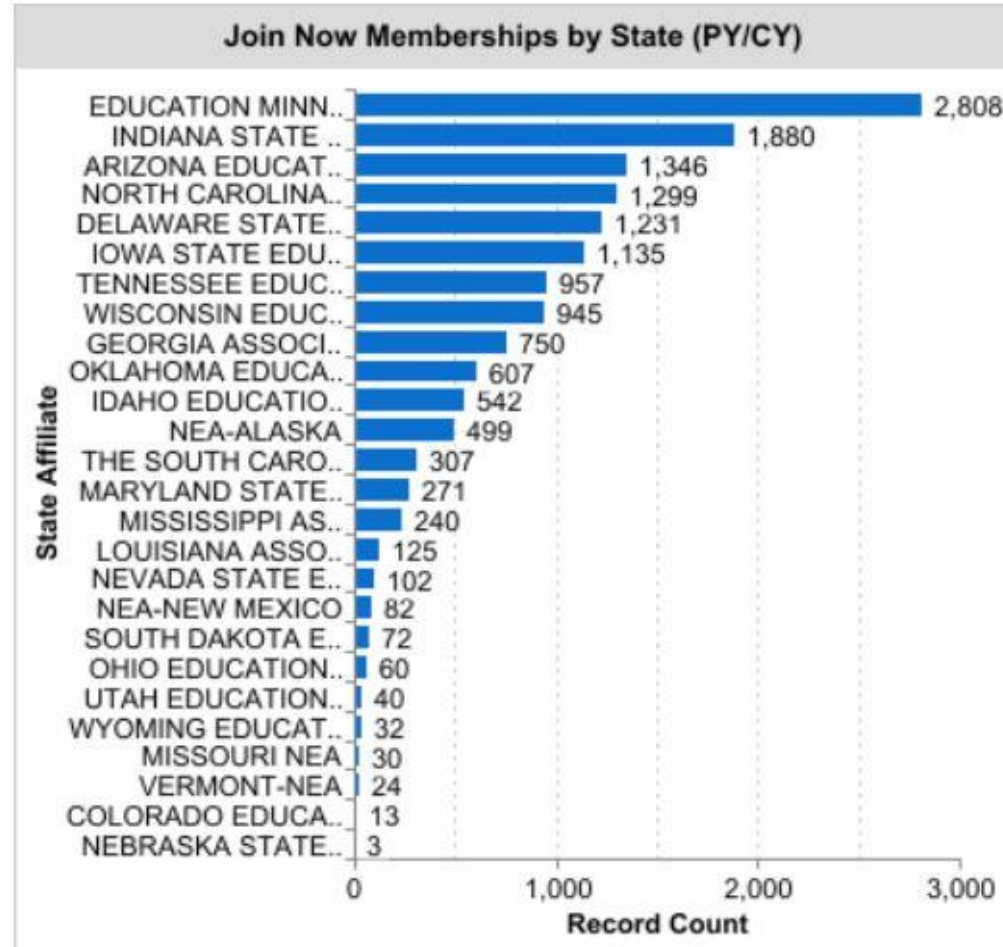
5 IPS States:
CA, MI, NJ, NY, PA

Join Now Potential Member Bulk Upload

The focus with Join Now launched states has been to help them establish best practices for potential member bulk uploads into IMS

Some examples:

- MN uses bulk uploads for PM lists but also uses other methods
- IN works local-by-local to send bargaining unit membership lists to state membership processors who match, clean, prep and enter into IMS
- CO is good example of a large urban pilot project loading PM lists into IMS
- VT has a process of acquiring lists after new law passed. They use business work-flows for bulk uploads into IMS expand with Join Now.



Join Now Memberships

| | |
|-------------------------------------|---------------|
| Total CY / PY Join Now Memberships: | 15,350 |
| Total CY Join Now Memberships: | 2,491 |

*JN numbers as of 4.12.21

Professional Standards and Practice

COMMITTEE MEMBERS

Zena Link, *Chair*
Worcester, MA

Cameo Kendrick
Lexington, KY

Brenda Seehafer
Rolla, ND

Lawrence Allen
Kissimmee, FL

Stephanie Johnson
Columbia, SC

Roman Trejo
Blue Island, IL

Dawn Blaus
Mercer, PA

Grace Leavitt
Augusta, ME

Mae Smith
Aurora, IL

Beth Brown
Nashville, TN

Kathleen Meltsakos
Groveland, MA

Christine Trujillo-Heeke
Henderson, CO

Kimberly Carlson
Dover, DE

Robyn O'Keefe
Birmingham, MI

Hanna Vaandering
Hillsboro, OR

Rebecca Cole
Windham, ME

Angela Powers
Olathe, KS

Staff Liaisons:
Andrea Prejean
Blake West

Charlotte Hayer
Petersburg, VA

Shannon Rasmussen
Bonney Lake, WA

Cynthia Henderson
Shreveport, LA

David Ring
Lubbock, TX

Charge

Build on the report, Great Teachers and Leaders: Creating the Culture to Support Professional Excellence, by identifying promising strategies, practices, and partnerships to develop and make recommendations for how professional development for educators and an equitable culture of learning should be achieved in a post COVID-19 world.

Committee Discussion

Background for the committee's work

Creating the environment and opportunities for every student to thrive in schools, classrooms, and communities grounded in great teaching and learning, equity, and social justice is a compelling mission for the 2020-2021 Professional Standards and Practices Committee (PSP). The PSP Committee continues to build on the recommendations and vision of the 2017 report, Great Teaching and Learning: Creating the Culture to Support Professional Excellence (GTL). Insights and strategies identified in both the 2019 and 2020 PSP Committee Reports also are foundational to the work of the PSP Committee in 2020-2021.

The COVID-19 pandemic had already begun to bring devastation to communities, schools, and the lives of our students when the 2020 PSP Committee Report was released a year ago. In fact, the pandemic not only highlighted long-standing inequities and systemic challenges for students and educators, it deepened the chasm of need experienced by those students and communities at greatest risk. The compelling need for action has never been greater, and lessons learned through responses to the pandemic continue to reinforce our understanding of the kinds of actions needed.

The framework for transformation

The PSP Committee was guided throughout its work this past year by focusing on two important questions:

- Where is transformation happening in schools and communities?
- What strategies are facilitating positive changes?

By identifying promising practices and strategies, the committee seeks to provide strategic guidance members and affiliates can use to enact positive changes across the country.

Research and first-hand experiences of committee members reinforced a crucial foundation for transformation. Regardless of school location or the tactics at work in these settings, meaningful and sustainable change only occurs where the key elements of transformation identified in the GTL report are at the heart of the school/district culture and decision-making. As programs, strategies, and ideas are considered, these elements of culture suggest crucial questions to guide our work:

- Passion for learning – Do the decisions, policies, and strategies being implemented demonstrate that each person is being encouraged to learn, grow, and thrive without constraints of bureaucracy, deadlines for learning, or preconceived expectations of potential?
- Assessment for excellence – Is the success of each individual and program measured in ways that learners/program participants believe are meaningful? Are the outcomes being measured chosen because they are easy to observe or because they are significant indicators of success? Are assessments designed with a focus on learning? Are assessments free from bias and any implicit cultural lens? Are measures focused on growth, or are they intended to sort

- people into preconceived levels of achievement?
- Culture of collaboration – Does collaboration feature significant participation by diverse voices to increase the relevance of learning goals and the kinds of program supports provided? Does collaboration meaningfully engage PreK-12 students, Education Support Professionals, Aspiring Educators, current active professionals, Educator Preparation faculty, administrators, families, community members, and policymakers, along with any other constituency that might meaningfully contribute to student learning and program success?
- Authentic autonomy – Does each person in the system have the autonomy needed to take ownership for their work and learning? Do they experience motivation from mastery of the work they are doing? Are those responsible for implementing any program or change entrusted to monitor outcomes and to collaborate in adjusting strategies as needed?
- Worth of each person and community – Does each person perceive they are genuinely cared for and respected, their potential is encouraged and developed, their previous experiences are seen as assets, their cultural and personal backgrounds are utilized to guide learning/program implementation decisions?

It is crucial to identify these transformational elements at the outset. The temptation too often pursued by policymakers and communities is to ask “Which programs are achieving great results in community X or classroom Y?” while ignoring the question of “What key elements are in place where transformational change is happening?” While the 2020-21 PSP Committee Report compiles many promising strategies, these can’t simply be copied from one location and pasted into another location expecting positive results. Achieving and sustaining transformative results can only be achieved with continued focus on the culture of the organization and the mindset of individuals within the system.

The landscape of strategies for transformation

The PSP Committee was guided throughout its work this past year by focusing on two important questions:

- Where is transformation happening in schools and communities?
- What strategies are facilitating positive changes?

By identifying promising practices and strategies, the committee seeks to provide strategic guidance members and affiliates can use to enact positive changes across the country.

Research and first-hand experiences of committee members reinforced a crucial foundation for transformation. Regardless of school location or the tactics at work in these settings, meaningful and sustainable change only occurs where the key elements of transformation identified in the GTL report are at the heart of the school/district culture and decision-making. As programs, strategies, and ideas are considered, these elements of culture suggest crucial questions to guide our work:

- Passion for learning – Do the decisions, policies, and strategies being implemented demonstrate that each person is being encouraged to learn, grow, and thrive without constraints of bureaucracy, deadlines for learning, or preconceived expectations of potential?

- Assessment for excellence – Is the success of each individual and program measured in ways that learners/program participants believe are meaningful? Are the outcomes being measured chosen because they are easy to observe or because they are significant indicators of success? Are assessments designed with a focus on learning? Are assessments free from bias and any implicit cultural lens? Are measures focused on growth, or are they intended to sort people into preconceived levels of achievement?
- Culture of collaboration – Does collaboration feature significant participation by diverse voices to increase the relevance of learning goals and the kinds of program supports provided? Does collaboration meaningfully engage PreK-12 students, Education Support Professionals, Aspiring Educators, current active professionals, Educator Preparation faculty, administrators, families, community members, and policymakers, along with any other constituency that might meaningfully contribute to student learning and program success?
- Authentic autonomy – Does each person in the system have the autonomy needed to take ownership for their work and learning? Do they experience motivation from mastery of the work they are doing? Are those responsible for implementing any program or change entrusted to monitor outcomes and to collaborate in adjusting strategies as needed?
- Worth of each person and community – Does each person perceive they are genuinely cared for and respected, their potential is encouraged and developed, their previous experiences are seen as assets, their cultural and personal backgrounds are utilized to guide learning/program implementation decisions?

It is crucial to identify these transformational elements at the outset. The temptation too often pursued by policymakers and communities is to ask “Which programs are achieving great results in community X or classroom Y?” while ignoring the question of “What key elements are in place where transformational change is happening?” While the 2020-21 PSP Committee Report compiles many promising strategies, these can’t simply be copied from one location and pasted into another location expecting positive results. Achieving and sustaining transformative results can only be achieved with continued focus on the culture of the organization and the mindset of individuals within the system.

The landscape of strategies for transformation

With this guidance in mind, the PSP divided its work into three sub-groups for 2020-2021 in order to build a basis for transformation across the continuum of professional practice:

- Recruitment and retention** – Develop and implement strategies to recruit an increasingly diverse population of future educators and provide cultural, social/emotional, and academic supports to help diverse Aspiring and Early Career Educators to be successful and thrive in the profession.
- The work of professional educators** – Develop and implement strategies to help practicing educators to grow in their understanding of culture, race, and human diversity. Deepen their commitment to combat racism and inequity and to lead the

transformation of culture in their schools.

C. Equity in our schools and communities – Develop and implement strategies to ensure that every student has the resources and opportunities they need to be successful in learning and social/emotional growth and has access to a safe, supportive, positive public school environment that values and honors their diversity and recognizes the worth of each person and community. Work to eradicate inequities made even more stark by COVID-19.

In the sections that follow, we provide a brief introduction to these three areas. Each section includes examples of strategies and programs that are generating positive results. The report concludes with a sampling of resources that may be helpful to members and affiliates seeking to generate transformative change.

Throughout the report, we identify the need for supports for student success. These supports encompass the culture described in the GTL report including social/emotional and academic support. Additionally, for the development of future educators, there is a crucial need for financial support to remove barriers to participation in preparation programs for all roles as educators. Removing bureaucratic hurdles and financial barriers to higher education for students pursuing all careers can facilitate a fundamental change of mindset for PreK-12 students. Systemic change is needed to foster a mindset of opportunity and hope for all students, increasing the relevance of PreK-12 school experiences as a realistic pathway to their desired future.

In addition to focusing on transforming organizational culture, the PSP Committee also highlights that significant and sustainable change does not happen in silos within schools or communities. The three subsections of work that follow are deeply interconnected. For instance, transforming recruitment and retention of new educators naturally grows and is sustained by transformations across the entire career continuum of the education profession and through changes in the communities where students and educators live and work. Finally, the need for systemic change requires our attention to achieve transformation within the mindset of individual educators, across the professional continua for educators in all roles, within our union, and throughout communities.

A. Transform recruitment and retention

Recruiting and retaining a more diverse, profession-ready generation of educators is a crucial priority for the NEA. Our members understand what research now confirms – when children have interactions with diverse teachers, particularly teachers that represent the same diversity of those students, they are more likely to be successful in school. Our nation also desperately needs for all children, students of all races and backgrounds, to encounter role models that intentionally demonstrate a belief in the worth of each person, an understanding of the individual giftedness of each student, and a commitment to better understand and tap into the rich cultural assets that are part of each student's background.

With this challenge in mind, the PSP Committee considered a range of strategies to recruit a diverse teaching workforce, to support high-quality preparation of diverse

Aspiring Educators, and to provide induction and mentoring that leads to professional and personal success of each early career educator (ECE). PSP Committee members analyzed programs in which they have either participated, seen in action in PreK-12 schools and preparation programs, and/or studied in their review of exemplars from across the country. Their review provided several promising strategies and tactics for members and affiliates to consider. Taking ideas and strategies like these to scale is a crucial next step in ensuring every student is provided academic and social/emotional support for success and access to equitable opportunities, as well as transforming the culture of schools and communities.

Strategies for recruitment and preparation

- Programs to identify and encourage potential future educators in middle school and high school are opening doors and instilling a spirit of opportunity for diverse learners to aspire to careers including education. NEA supported the development of the Educators Rising curriculum many locals are utilizing to guide implementation of high school courses for potential future educators.
- Mentoring programs for PreK-12 students are providing encouragement to youth who may not otherwise see a pathway to college or careers. Mentors may include current aspiring educators or graduates from area Higher Education programs, and be representative of greater diversity.
- Some programs for future educators provide opportunities for potential educators to hear from association leaders about the union's role in creating great public schools, fighting racism, and ensuring equitable opportunities for all students.
- Role models representing the diversity of our PreK-12 student population are crucial in providing exemplars, words of encouragement, and a vision of what can be accomplished. While role models in some programs are community members, taking this strategy to scale will be significantly advanced as the educator workforce becomes more diverse so that students will have access to role models who are professionals in their schools.
- School- and district-wide programs have been formed as 'teacher academies' that support diverse high school students in charting a course into teacher preparation programs, recognizing that most ECE's return to work within 20 miles of where they grew up.
- Some strategies are not systematic programs but are the work of individual educators with a vision for transformation. For example, PreK-12 students should be offered encouragement and supportive pathways to a variety of roles as educators including work with early childhood through college students, Education Support Professionals (ESP), Specialized Instructional Support Professionals (SISP), teaching, etc.
- Members and locals are beginning to recognize the importance of intentionally developing positive messaging about the teaching profession, both to encourage promising students AND to counteract overwhelmingly negative narratives about the profession as a career.
- Some schools and districts are working to

identify and combat both institutional racism and unconscious biases that track students of color away from a challenging PreK-12 curriculum and under-represent diverse students in gifted programs, Advanced Placement courses, etc. To take this strategy to scale in every school and for every student will require courageous conversations about race and transformative experiences for educators across the country. This is not a “program” that can be implemented, and it can’t wait until a new generation of educators can change the culture of the profession.

- Locals and school districts in some settings have established programs to connect students with financial supports to pursue a college education, at times in partnership with colleges. Programs help students navigate the bureaucracy of financial aid and college application processes, particularly students who may represent the first generation of college students in a family.
- Locals in some settings are working with school districts and policymakers to ensure Career and Technical Education (CTE) programs for future educators are available to all students in high school. These programs may be linked to specific CTE classes and formally identified as Future Teachers of America or Educators Rising. Even in settings where formal CTE courses are not in place, locals should seek to establish informal clubs or interest groups for students interested in a career in education.
- Locals, school districts, and Aspiring Educator programs in colleges are beginning to create intentional, seamless partnerships between Middle- and High School Educators Rising/Future Educators programs and Aspiring Educators programs at area campuses, both in community colleges and 4-year colleges. Such partnership should become the norm for every community with a teacher preparation program.
- State and local affiliates have partnered with college faculty and Aspiring Educators chapters to encourage PreK-12 students to consider a career in education by allowing them to interact with faculty, tour campuses, and learn about their preparation programs.
- State and local affiliates have also partnered with college faculty and Aspiring Educators chapters to expand opportunities for aspiring educators to engage in a range of activities such as tutoring, observation, and working with small groups in PreK-12 schools.
- Aspiring Educators Programs on campuses have implemented a host of workshops to provide culturally responsive teaching support, assistance with trauma-informed pedagogy, and strategies to address systemic racism and inequity in our schools (e.g. workshop resources on ‘Decolonizing Your Bookshelf’ and ‘How to Have Courageous Conversations About Race’). But the AE program currently only reaches a limited percentage of all future teachers. Tremendous opportunities exist to expand the reach of AE programs by building partnerships between every preparation program and NEA state and local affiliates.
- HBC and U Legacies is an example of a program that taps into the experiences of people of color who are Early Career Educators to share their stories and encourage PreK-12 students to consider careers in education. This recruitment strategy for Historically Black Colleges and Universities (HBCUs) contributes to the fact that Minority Serving Institutions (MSIs)

provide a majority of native people and people of color entering the education profession.

- Massachusetts introduced its Asian American Pacific Islander Educator Mentorship Program (AAEMP), funded by an NEA Community Advocacy and Partnership Engagement Grant.
- Mentoring by ‘near peers’ is providing support from ECEs to Aspiring Educators, and from educators who have a few years of experience to ECEs in their first years of practice. These relationships address such topics “I wish I had known...” and an introduction to navigating challenging school culture while also working to support the transformations advocated by the PSP Committee.
- Mentors need training – some of the best programs for mentoring and also for peer assistance are led by the union and result in both success of ECE’s and retention in the profession.
- Cooperating Teachers (mentors for Aspiring Educators during clinical practice) also need training. NEA has worked with multiple partners to provide the kind of training that results in transformative improvements in the readiness and performance of early career educators. Read about some of NEA’s work (West, 2021) and the research on mentoring (Foster, 2020).
- High-quality mentoring increases teacher effectiveness.

Strategies to be expanded

Some ideas are only being implemented on an extremely limited, case-by-case basis. For these, action is needed to intentionally transform the system:

- Locals, state affiliates, and NEA should focus particular energy in settings where potential and aspiring educators of color are in schools and colleges. Diverse PreK-12 settings should be prioritized to help encourage diverse future educators. Minority Serving Institutions should be targeted to provide additional academic, social/emotional, and financial supports to Aspiring Educators to be successful in preparation programs.
- Locals should advocate to restructure schools to embody the kind of collaborative and supportive culture for PreK-12 student success described in the GTL report. A powerful model to embrace is NEA’s Community Schools’ pillars. A school and community that pursues the vision of those pillars will be an outstanding setting to help Aspiring Educators prepare for successful careers in education.
- NEA advocates nationally for educator preparation programs to be grounded in intensive and extensive clinical practice experiences. This advocacy needs to be extended to state and local affiliates. Shortcut pathways to teaching place under-prepared teachers into the most demanding settings – we should insist that such programs be dismantled, and all aspiring educators should participate in appropriately funded Professional Development Schools and Teacher Residency programs, with a full year of clinical experiences. These kinds of programs ensure profession-ready educators for every classroom, overcome challenges of retention in the profession, and end the cycle of constant turnover in high-needs schools.
- College affordability issues MUST be addressed.

One strategy is to implement Teacher Residency Programs using NEA's guidance, providing significant stipends or salaries to participants so that high quality educator preparation is not a luxury only available to a subset of aspiring educators because of their financial situations.

- Cultural biases within some assessments required for program completion and/or licensure serve as a barrier to a career in education for some native people and people of color. NEA must advocate for bias-free, performance-based assessments that demonstrate candidates are profession ready. All such systems of assessment must provide multiple ways for Aspiring Educators to demonstrate readiness to enter the profession..
- Costs for all assessments required for program completion and/or licensure must be reduced or eliminated so that these fees never serve as a barrier to Aspiring Educators seeking to enter the profession.
- NEA should work to ensure members, including aspiring educators, are aware of NEA's extensive library of micro-credentials for professional learning.
- NEA should continue to expand learning opportunities, such as micro-credentials and workshops for members to grow in their understanding of race, culture, bias, institutional racism, culturally responsive practices, trauma informed practices, understanding organizational change, and culturally-responsive union leadership.
- Union-led initiatives to increase the diversity of the education profession should include such strategies as:
 - i. Increased opportunities for aspiring educators to work in diverse PreK-12 settings
 - ii. Training to ensure mentors and cooperating teachers who work with aspiring educators and early career educators are able to model culturally responsive practices both with their PreK-12 students and with their mentees.
 - iii. Focused efforts to transform highly-diverse schools to reflect the GTL culture so PreK-12 students will be more academically successful, capture a vision for their own potential for future success
- To increase the attractiveness of the profession to a new, diverse generation of educators, our union can help members focus our own messaging about the rewards of the profession and the profound importance of choosing to be an educator for the future of our communities and transformation of our nation. Even more importantly, our members must create the kind of learning environments that will attract our students to become future educators.

Strategies for alternate routes

Programs to help adults find non-traditional paths to teaching are part of a larger system to provide opportunities for entering all education professional roles at multiple points in life.

- Grow-your-own programs in schools are in place in many settings, helping paraprofessionals and recent graduates make career transitions into teaching as a

profession.

- Programs to recruit tutors from the ranks of students on college campuses are providing potential aspiring educators with a service opportunity AND an understanding of the personal rewards of helping another person learn/succeed, leading some college students to change career goals and gain the degrees/certification to become educators.
- Programs have been established to pair Education Support Professional (ESP) members with teachers to offer job shadowing and mentoring as they consider careers in teaching.
- The PSP Committee suggests that, while some sessions have been included in past ESP conferences, future ESP conferences should intentionally feature sessions to provide guidance to those interested in changing job roles, such as pathways to become paraprofessionals, to become teachers, and to work in new ESP roles of interest. It is crucial that these sessions be clearly intended to offer routes to alternative roles and NOT interpreted as diminishing the importance of ANY role, as all members of the education profession are absolutely essential to create our vision for great public schools.

Strategies to provide systems of support

Support for educators throughout their careers, but particularly during preparation and induction, are vitally important to overcome the added challenges faced by native people and people of color within the profession.

- Affiliates at local, state, and national levels are gaining understanding of the crucial need to have native members and members of color working both to design and implement all support systems for their diverse colleagues throughout their careers as educators.
- Well-designed mentoring programs for Early Career Educators (ECEs) help educators achieve greater success working with their PreK-12 students and decreasing turnover in the profession.
- While some programs as described in the previous bullets are achieving positive results, not all can point to success. These support systems should be measured not only by numbers of participants and contact hours, but also by the expressed satisfaction of individuals, the retention of educators of color/native educators in the profession, and equitable opportunities to move into all roles, including administration, in schools and districts.
- One local implemented a grant to provide targeted support to ECEs during the pandemic. The initiative included a food truck, BLM t-shirts, a free drive-through flu shot clinic, etc.
- Differentiated responsibilities for ECEs have been bargained in some settings. Building intentional time into the school day to work with a mentor, to research teaching strategies and learning resources, and to plan for instruction are all contributors to an educator's success and retention in the profession.
- Differentiated salaries and time schedules for teacher leaders serving in roles to support ECEs are also a bargaining outcome in many locals. Implementing these programs provides opportunities for greater leadership in the profession without necessarily moving into administrator roles.

- When native persons/ECEs of color are hired, they often work in settings where there is limited or no diversity among the other educators on staff. Locals and state affiliates are beginning to form collaborative virtual support networks that transcend school, district, and even state boundaries to ensure native people and people of color have the support they need to succeed.
- Programs such as Early Leadership Institute (ELI) provide support for professional growth and development of leadership skills, and are helping to transform education from an isolated job to one that includes intentional collaboration among educators.
- The Learning Policy Institute offers an excellent resource to assist members, districts, and communities in attracting and retaining a teaching workforce including native people and persons of color: https://learningpolicyinstitute.org/sites/default/files/product-files/Diversifying_Teaching_Profession_REPORT_0.pdf

B. Transform the work of professional educators

Schools and districts across the country are widely engaged in tactics with the stated goal of supporting the learning for every student and ensuring equitable opportunities for all. Often, the tactics used in two different settings appear, at first glance, to be essentially the same, but there are profound differences upon deeper examination.

Consider, for example, that many districts have established some high-level administrative position focused on equity. In some districts, practitioners observe that many actions are taken, but programs enacted by these administrators to make the district “look good” have minimal impact on student learning or success. In other settings, similar senior administrators with responsibilities for equity are actively engaged in impactful strategies such as providing training to staff in the field. PSP Committee members note that some district leaders ‘just don’t get equity.’ In another state, it was observed that these same strategies for taking action with equity are enacted without outcomes data to track success, but rather to provide evidence of action to the courts when equity cases arise. The question remains: what do we do when our interventions are not impactful? And, what are meaningful and measurable impacts that we should track?

Professional development is one avenue to help educators in classrooms and other work settings transform practice to increase equitable learning opportunities for all students. Many PSP Committee members reported instances in which practitioner-led professional development had a significant impact on the work of their colleagues. For example, the book study conducted by the PSP Committee in 2018-2019 was extremely worthwhile to help committee members address culturally responsive practices in their own settings. On the other hand, PD that is not designed and implemented by practitioners is generally less effective, missing the mark on the needs of our members and possibly serving to allow the school/district to check off the box that they had addressed equity. Finally, PSP members observed there is a subgroup of school who are anxious to voluntarily participate in meaningful training about topics like Culturally Responsive

Teaching and the Brain (Hammond, 2015). But it is often those who need such professional development the most that fail to participate, not recognizing its value or relevance for their professional competence. Strategies are needed to increase participation (achieve a critical mass) of school staff in professional learning on topics such as race, cultural competence, implicit bias, and trauma informed pedagogy either through effective marketing OR through infusing these topics into other training in which participation is high.

Increasing the diversity of the teaching workforce across schools and districts promises to help schools better address the needs of all students. Students need to see role models and persons with varied cultural and personal backgrounds in teaching. Members report that, in some districts, the union has requested turnover and retention data to assess if the support systems for native educators and educators of color are helping to support and increase the diversity of district professional staff. But they have been unable to get data from the district. In addition to the lack of simple data, there is also a perception that people who know about whether programs are successful or not are wary of telling the truth. Maintaining a facade of district attention to diversity is essential if educators want to keep their jobs.

While our nation’s student population becomes increasingly diverse and the economic situation of families continues to negatively impact resources for our schools, the teaching force entering the profession remains overwhelmingly white, typically from middle-class backgrounds, and with limited personal experiences with diverse cultures and peers. The success of early career educators is at great risk when they are under-prepared to work with a diverse classroom of students or with students with limited fiscal resources. Unconscious biases may arise out of the dissimilar educational experiences of the ECE. Those differences may also foster negative responses from students that perceive a disconnect with their educators.

Classrooms will better serve the needs of their students when students encounter native people and people of color as educators throughout their learning journey. Schools will also be better when diverse groups of educators regularly collaborate, plan, teach, review student work, etc. Increasing the diversity of the teaching force is a challenging goal, particularly in times when the profession looks less attractive and enrollment in teacher preparation has fallen significantly across the country. Meaningful interventions need to be built on answering such questions as these:

- Is this a profession that is inviting to caring, creative, and talented people? Or do perceptions of lack of professional autonomy, limited compensation, and the tendency of policymakers to make hard-working educators the scapegoat for the problems created by poor policy choices discourage potential future educators?
- As current PreK-12 students observe their own schools, do they see being an educator as an attractive and rewarding way to spend their lives?

Promising ideas for members and affiliates

Promising ideas are only impactful IF they are

implemented in ways that build on the underlying keys to transformation identified in the Great Teaching and Learning report. Those elements of organizational culture and personal vision are the difference between change that results in transformative improvements in equity, social justice, and learning versus change that serves merely to document that activity has occurred (allowing policy-makers and leaders to blame the practitioners in the field, students, and their families for any lack of success.)

In his book *Good to Great*, Jim Collins (2001) noted that when things go well the transformative leader uses their “window” to recognize the people who are responsible for success but when things are not working, they look at the mirror to ask what they should have done differently as leaders.

Exemplary strategies and tactics

- A support structure was established in Maine to overcome the isolation of the limited diversity in the teaching profession: The association hosts biweekly conversations for members from various affinity groups. Concerns and ideas for support raised during the conversations are shared with the state affiliate president to develop potential actions at the state affiliate level.
- The Maine Education Association Board of Directors has a segment of each meeting agenda dedicated to racial equity—book discussion, updates on the work, plans for continuing the work.
- State affiliates in several states are collaborating with their respective departments of education and other educator groups to share resources and provide training to transform the work of educators.
- Leaders for Just Schools facilitators provide training for members statewide, for local school districts.
- Multiple state affiliates are utilizing their publications to regularly share resources for educators and families about diversity, culturally responsive practices, and responding to racism and bias.
- A Michigan school has replaced traditional “Saturday school” as depicted in the popular 1985 movie, *The Breakfast Club*, with a program focused on student success, providing tutoring for students who need help in any grade level and any academic area. Each session begins with a motivational speaker, includes paired time with a tutor, and a closing chance to discuss what the student learned for the day. For more details about “Creating a caring community of learners”, see <https://www.birmingham.k12.mi.us/domain/839>.
- “Teachers’ Club” is a practitioner-led and driven discussion and study group that investigates new instructional ideas and philosophical changes to support the goal of learning for each student. For example, one school transformed parent conferences by shifting away from using grades for motivation and judgment, refocusing on learning goals, student accomplishments and areas for growth. The purpose of every classroom activity is a meaningful learning outcome, not earning points or affixing a percentage to someone’s self-worth.
- Washington NAKIA Academy is a program bringing together 70 educators of color (in two cohorts) over a four-month period for a total of 34 hours of thinking,

learning, interacting, skill-building, and fun. The Academy helps keep newer educators in the field by providing support, mentoring, and a connection between veteran and newer educators of color. See <https://www.washingtonea.org/we-are-wea/early-career-educators/for-us-by-us/> for details.

- Several state affiliates have initiated book studies to help educators and association leaders explore their own cultural lens, the presence of implicit bias and the need for ongoing personal reflection and openness to feedback. Participants gain deeper understanding of both the existence of systemic racism and a white-supremacy culture within schools and communities AND develop strategies to become co-conspirators for transformation.
- Strategies such as book studies, movie-nights, and even courageous conversations all require attention to creating an environment sometimes called ‘safe space’ for individuals to express their personal experiences. This kind of atmosphere may better be called a ‘brave space’ that encourages deep self-reflection and supports growth without adding to the weight of any person’s sense of guilt or past inadequacy.
- In some settings, educators from ALL roles are included in the professional learning opportunities to help transform school and community culture. All too often, though, those professional learning opportunities are either segregated by job role or not offered at all for ESP members.

Strategies to expand alternate routes

- Utilize NEA conferences (e.g. Leadership Summit) as a place to focus on teaching and learning practices for equity and culturally responsive teaching.
- Provide frequent opportunities for informal peer observation (in addition to or in place of formal observation processes.) It was noted that instructional paraprofessionals may visit multiple classrooms and teachers each day, but teachers miss out on seeing the variety of great teaching ideas at work in a school. Teachers could gain knowledge, ideas, and energy from frequent opportunities to observe in other classrooms.

C. Transform equity in our schools and communities

Challenges faced by our students, their families, our members, and communities since the *2019-2020 Reports of Committees (Professional Standards and Practices Report)* have served to deepen the inequities in schools and communities. While the transformation of schools to virtually support the student learning is an amazing testament to the commitment and creativity of our members, it too often seems that reporters and policy makers are willing to overlook that a significant portion of our students and their families have been left behind. Those left behind are communities with the greatest poverty, most often students and their families who are native people and persons of color. “Successfully” reaching 75% of our students in the COVID-19 environment seems like a great accomplishment but demonstrates an underlying willingness to overlook the systemic racism that was already undermining opportunity and success of native people and persons of color.

The hearts and minds of those in positions of power and leadership must be transformed to embrace a commitment to combat the racism of inequity for students. Recent political turmoil highlights a critical mass of our population that is also blind to the destructive power of white supremacy not only in the lives of native people and persons of color but for ALL people – there is lack of understanding that the well-being of each individual ultimately impacts the well-being of all.

The needed change is not coming smoothly. Even as outrage over police violence toward native people and persons of color and treatment of the children of undocumented immigrants fuels a rising tide of concern and calls for change, the privileged in power mobilize their constituencies in both political and protest arenas. The polarization within society even made it difficult for schools to let students watch the 2021 Presidential Inauguration without outcries from some in the community. Staff and students who are native people and/or persons of color are experiencing even greater isolation and a crucial need for support in schools.

Unfortunately, surveys of NEA member attitudes as well as personal experiences of PSP Committee members interacting with some educators across the country reveal there is also an unconscious bias and need for change within our own schools and profession. For example, multiple studies demonstrate inequitable discipline practices toward subgroups of students, skewed teacher recommendations for gifted programs, and bias evident in survey results on beliefs about the abilities of various students. Clearly, the strategies to transform schools must address equitable opportunities for students and their families .

Institutional racism is at work both within education and in a range of services and resources in our communities: health care, social services, funding for quality infrastructure, affordable housing, access to nutritious food options, etc. Even if schools were equitably funded and if the culture and educational practices within the school were transformed, learning would be seriously hindered by the range of conditions impacting our students and their families. Transformation must involve schools AND communities, ideally through integral partnerships between school and community.

Two competing concepts must BOTH be addressed as we pursue transformation:

1. Our strategies for change must provide a space for courageous conversations that include community members and colleagues who disagree with the assertions in this report. Only by finding ways to have reasoned discussions about ideas, beliefs, facts, and our individual experiences without hyperbole and name-calling can we hope to understand each other, build trust, and to create an atmosphere that supports change in the hearts and minds of all who engage in the conversation. We must also recognize that each person is at a different place in their life experience and journey toward understanding race, culture, and individual differences. Wherever each person is in their experience, we must create an environment that awakens and facilitates change and growth. No one has achieved a perfect

understanding of all other people. Deepening our understanding and appreciation for those who are different from us is a career-long process for educators and a lifelong process for each individual.

2. Still, the need to create the open atmosphere described in the first point cannot allow us to delay or draw out the process of change. The well-being of our students is at stake. It's been almost 58 years since Martin Luther King, Jr. explained in the "Letter from a Birmingham Jail" that the fundamental opportunities for life, liberty, and the pursuit of happiness cannot be sacrificed because we need to be patient as persons with privilege take time to change.

The examples that follow highlight some of the meaningful changes and strategies that are occurring right now, arising from the leadership, passion and commitment of NEA members in communities across the country.

Examples of social justice advocacy training and activism

- Leaders for Just Schools is a powerful year-long experience that's helping members become the leaders in their schools and communities to take this transformation to scale nationally.
- NEA's Teacher Leadership Institute and Early Leader Institute utilize overarching leadership competencies including "Explore and Challenge Inequity", "Collaborate Purposefully", and "Cultivate Socially Just Learning Environments".
- State affiliates have partnered with each other and with external partners to offer "Welcoming Schools" training, facilitated by NEA.
- Book study groups in local and state affiliates, AE chapters, etc. are exploring the rich array of publications that can create deeper understanding of race, bias, and culture.
- A partnership between Kansas NEA, Missouri NEA, and Modern Family Alliance provided books featuring diverse characters for the PreK-12 students in the classrooms of workshop participant educators.
- Aspiring Educators (AE) held a national workshop on how to engage in courageous conversations about race.
- AE followed up their initial conversations event with a week of action (workshops, activities, advocacy, panel discussions) for Black Lives Matter.
- State affiliates, locals, and AEs have held social justice workshops and symposia with a focus on deepening our understanding of race, culture, bias, privilege, and steps both to be anti-racist educators and activists in our communities. These activities have been held for the affiliate's governance boards and UniServ councils in addition to workshops and experiences for all members.
- Social justice-focused movie nights have been held for both active professionals and AE members. A few examples of the featured films include Hair Love, Freedom Writers, 13th, The Long Shadow, and more. Events have included follow-up discussion, sometimes including the film-makers, authors, actors.
- Vermont NEA utilized an NEA grant to develop "I Am From Here", a powerful video and accompanying discussion resources and lessons. These resources are being used not only in schools across Vermont but in

schools and communities across the country.

- Local affiliates are employing various surveys and equity audits to gather data about their settings. Facilitated conversations are then used to help educators, students, and community members explore issues of race and culture.
- (Note: Such surveying might be a worthwhile activity as part of major NEA meetings - Leadership Summit, NEA RA, etc.)

Examples of school and community transformation and action

- Possibly the largest transformations that align with NEA's GTL report can be found in our advocacy for and support of the creation of Community Schools.
- Some schools are recognizing a need for signage both for LGBTQ students, native students and students of color to find safe spaces within schools and staff are increasingly sensitive to the need to display these signs as a reminder of their own role in being an anti-racist educator.
- In response to current events and to the training opportunities, some members are collaboratively committing to call out examples of bias and privilege

in settings from the classroom to the teacher's lounge, from the union meeting to the school board meeting.

- NEA members advocated for new language that is now part of the Council for Accreditation of Educator Preparation (CAEP) standards for preparing new teachers. It requires preparation programs to demonstrate how Aspiring Educators are learning about race, culturally responsive practices, and how they are building a career-long practice of reflection on their personal biases and cultural lens.
- Students and educators in some settings are leading efforts to decolonize the bookshelves of their classrooms and school libraries, ensuring that native students and students of color have access to literature both by diverse authors and featuring diverse characters, stories, and communities.
- Our union is using its status and power within the community to engage with other organizations and foster change in their policies and processes as well.
- Bargaining for the common good has allowed community voices to be incorporated into the vision for schools and communities, using the influence of the union and its agreements to ensure greater attention to equity for students and families.

A Pathway to Transformation

(Summarized in one quick and easy page)

The promising examples of transformation noted in this report serve to generate an important question: what project or strategy should be chosen to initiate transformation in YOUR setting. In fact, the range of potential strategies and tactics offered in this report are overwhelming. Two crucial questions come to mind:

- How does an individual know where to begin a journey toward greater understanding of culture and bias, improved professional practice, or leadership of the profession?
- What is the appropriate place for a group of NEA members in a school, the larger school community, or for an affiliate to pursue a journey toward organizational transformation?

Step 1 - Transforming Self

Before anyone can lead change or model transformation for others, they must be on a path to personal growth and development

Step 2 - Transforming Relationships

No single individual can change an organization by themselves, and to have the credibility and trust to be an agent of change requires establishing positive working relationships. Relationships become a crucial means to support each other on a shared learning journey. Relationships become the soil in which a transformed organization can grow.

Step 3a - Transforming the Organization, Culture, and Leadership

This is where organizations often begin... (but not always at the beginning of this crucial sequence.) In order to select and implement a meaningful, transformative plan of action requires several important steps. An extremely helpful model for change is called Improvement Science. An outline of this process includes these steps

- Map the assets and available resources
- Conduct a needs assessment to identify concerns
- Analyze the data
- Engage the community in establishing aims, outcomes, SMART goals
- Select strategies (possibly from the ideas above) to accomplish transformation
- Repeat this cycle with continuous improvement as the goal

Step 3b - Transforming Professional Practice

Educators in all roles must transform their work to implement the principles of the GTL report. Educator actions and decisions must demonstrate a belief in the worth of each person (PreK-12 students, their families, colleagues, and community members), implement culturally responsive practices, replace traditional discipline with restorative strategies, etc.

A Pathway to Transformation: The Details

Step 1 - Transforming Self

Before any individual can become an agent of change in their environment, they must be engaged in the life-long process of self-reflection and working to focus on life experience with an outward mindset. This includes seeking to better understand one's own cultural lens and unconscious biases. Everyone has such a lens created by their unique life experiences. All people have biases that influence their actions on a subconscious level. For this reason, the first step toward transformation is to engage in personal reflection. Since growth and transformation are cyclical, ongoing processes rather than events, reflection is also a recurring step. It is facilitated by asking others for honest feedback. Some districts require staff to conduct a 360-review by surveying students, parents, colleagues, etc. If the school/district allows such data to remain the confidential, sole property of the educator then it holds the promise for transformation. It is not the responsibility of educators of color to always lead the transformation process, nor must they always be responsible to facilitate the growth of their colleagues. White educators must be co-conspirators, working both to transform themselves and to facilitate the growth of colleagues, PreK-12 students, families, and community members.

Possible action plan—

- Read or revisit some of the resources on personal growth and reflection
- Reflect on possible areas for personal growth
- Devise and implement specific strategies for change and data to monitor
- Invite a trusted colleague to assist with observations, feedback, and reflection process
- Invite a broad, diverse group to provide feedback... be ready to hear the truth about needs for change.
- Keep in mind that changing actions is not nearly as powerful as changing hearts and minds.

Resources to support personal transformation--

Transforming self or facilitating as other individuals experience transformational growth require skill and sensitivity to support each person's psychological and emotional needs. The first resources may be helpful in addressing these challenges and needs.

Bridges, W. (2009). *Managing transitions*. Philadelphia, PA: Da Capo Books.

(William Bridges work involves both a personal journey and a realization that it is times of painful transition that are the main points of growth for individuals.)

The Arbinger Institute. (2018). *Leadership and self-deception: Getting out of the box*. Oakland, CA: Berrett-Koehler Publishers, Inc. (in addition to readings from The Arbinger Institute, contact NEA Teacher Quality for additional information about workshops on their programs.)

Covey, S. R. (2013). *The 7 habits of highly effective people: Powerful lessons in personal change*. New York, NY: Simon & Schuster.

A second element of the transformation experience is to increase knowledge and understanding of racism, implicit bias, and white supremacy culture in our nation's history and current reality. Articles and books that address these issues may serve as excellent resources for personal growth and as the impetus for small group discussion, book studies, film nights, etc.

Delpit, L. (2006). *Other people's children: Cultural conflict in the classroom*.

Diangelo, R. (2018). *White fragility*. Boston, MA: Beacon Press.

Eberhardt, J. (2019). *Biased. Uncovering the Hidden Prejudice That Shapes What We See, Think, and Do*. New York, NY: Penguin Books.

Kendi, I. X. (2019). *How to be an antiracist*. London, UK: One World.

Kendi, I. X. (2017). *Stamped from the beginning*. New York, NY: Bold Type Books.

Kendi, I. X. & Blain, K. N. (2021). *Four hundred souls: A community history of African America, 1619-2019*. London, UK: One World.

McGhee, H. (2021). *The Sum of Us: What Racism Costs Everyone and How We Can Prosper Together*. London, UK: One World.

Pollock, M., ed. (2008). *Everyday antiracism: Getting real about race in school*. New York, NY: The New Press.

Rothstein, R. (2017). *The color of law: A forgotten history of how our government segregated America*. New York, NY: Liveright Publishing Corporation.

Resources to address bias--

Video resources, clips from conversations about race, and varied self-assessment instruments are excellent tools to deepen our understanding of race and culture.

What is unconscious bias? <https://www.youtube.com/watch?v=rbe5D3Yh43o>

McCombs School of Business video on implicit bias (part of a series of videos including ethics, equity, racism, etc): <https://www.youtube.com/watch?v=OoBvzI-YZf4>

Dixon, A. (2011). This video clip addresses the question, "Can we reduce our bias?" www.greatergood.berkeley.edu/article/item/empathy-reduces-racism/

Overcoming unconscious bias and the tendency to believe what we already think we know: https://theoatmeal.com/comics/believe_clean

Quizzes and activities to explore bias and knowledge about racism: www.edchange.org/multicultural/quizzes.html

Harvard *Project Implicit* is a consortium that originated in 1998 and now includes researchers and universities from

around the world. Their online implicit bias assessment instruments are an excellent point for beginning a process of self-reflection and initiating discussions with groups: <https://implicit.harvard.edu/implicit/takeatest.html>

Step 3a - Transforming the Organization, Culture, and Leadership

As the members of a community embrace the pathway to transformation of self and relationships, it becomes possible that the culture of organizations can be transformed as well. All of the resources previously provided for both individual transformation and for transforming relationships can be relevant and usable for work with organizational culture. Key elements of culture include deepening each person's belief in the worth of each person, building the trust to extend genuine autonomy to others, growing the relationships to support deep collaboration, and the willingness and courage to assess what truly matters - to hear the truth about needs for change.

These all provide a foundation in which innovation can thrive. In such an environment, NEA is also facilitating the work of leaders and affiliates, helping them employ change ideas proposed by the Carnegie Foundation Improvement Science. When several individuals or groups are working on similar problems, they also can form "Networked Improvement Communities".

Possible action plan: In a nutshell, the cyclical steps to engaging in this change process includes a spiraling cycle of actions.

- Establish/enhance positive relationships and engage the broad community of voices in all steps
- Develop a mapping of the assets and available resources
- Create and conduct a needs assessment to identify concerns
- Use diagrams and charts to analyze the data and hypothesize causes for problems
- Use Driver Diagrams to identify goals/aims and the 'drivers of change'
- Select a relevant, meaningful strategy to improve things (possibly using the array of examples above), then use a Plan-Do-Study-Act cycle to see if your strategy works.
- Repeat this cycle with continuous improvement (while learning from others engaged in this process via Networked Improvement Communities.)

Resources to support transformation--

As noted, this is an abbreviated outline of the process for Improvement Science. In addition to working with NEA staff who are facilitating this process in various settings and with varied problem scenarios, here are two resources to help leaders in a local, school, or community to take action:

Leadership, Organizational Culture, and Improvement Science

Beginning the conversation:

Patterson, K., Granny, J., McMillan, R. & Switzler, A. (2012). *Crucial conversations: Tools for talking when the*

stakes are high. New York, NY: McGraw Hill.

Singleton, G. E. & Linton, C. (2015). *Courageous conversations about race: A field guide for achieving equity in schools*. Thousand Oaks, CA: Corwin Press.

The Arbinger Institute. (2019). *The outward mindset: How to change lives and transform organizations*. Oakland, CA: Berrett-Koehler Publishers, Inc. (in addition to the reading materials, some NEA staff are facilitators for this program)

Nuri-Robins, K. Consider the introduction to cultural proficiency offered by Dr. Nuri-Robins on her website and the short introductory video clip on the opening page: <https://kikanzanurirobins.com/diversity-equity-inclusion>

Improvement science:

Bryk, A. S., Gomez, L. M., Grunow, A., & LeMahieu, P. G. (2015). *Learning to improve: How America's schools can get better at getting better*. Cambridge, MA: Harvard Education Press.

NEA's Certification Bank - Community School Improvement Science stack of 8 micro-credentials provide complete, thorough background into each step. The resource can be accessed as a reference or leaders may wish to actually pursue the micro-credentials. It can be applied to problems beyond the specific challenge of establishing a community school, too.

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=CS>

Recruitment and retention

Carver-Thomas, D. (2018). *Diversifying the teaching profession: How to recruit and retain teachers of color*. Palo Alto, CA: Learning Policy Institute. Accessed at: <https://learningpolicyinstitute.org/product/diversifying-teaching-profession>

Darling-Hammond, L. & Oakes, J. (2019). *Preparing teachers for deeper learning*. Cambridge, MA: Harvard Education Press.

Dee, T. S. (2004). *Teachers, race, and student achievement in a randomized experiment*. *Review of Economics and Statistics*, 86(1), 195–210. Accessed at: <https://www.mit-pressjournals.org/doi/pdf/10.1162/003465304323023750>

Egalite, A. J., Kisida, B., & Winters, M. A. (2015). *Representation in the classroom: The effect of own-race teachers on student achievement* (Working Paper No. PEPG 14-07). Harvard Kennedy School, Program on Education Policy and Governance. <https://files.eric.ed.gov/fulltext/ED562618.pdf>

Gershenson, S., Hart, C., Hyman, J., Lindsay, C., & Papageorge, N. W. (2018). *The long-run impacts of same-race teachers* (NBER Working Paper No. w25254). National Bureau of Economic Research. <https://www.nber.org/papers/w25254.pdf>

Gershenson, S., Hansen, M., & Lindsay, C. A. (2021). *Teacher diversity and student success: Why racial*

representation matters in the classroom. Harvard Education Press, Cambridge, MA.

Hansen, M., & Quintero, D. (2019). *The diversity gap for public school teachers is actually growing across generations*. Brown Center on Education Policy. <https://www.brookings.edu/blog/brown-center-chalkboard/2019/03/07/the-diversity-gap-for-public-school-teachers-is-actually-growing-across-generations/>

Lachlan-Hache', L., Causey-Konate', T., & Mizrav, E. (2020). *To achieve equity, build a diverse workforce*. *Learning Forward* 41(6). pp. 24-27, 32.

Lindsey, R. B., Nuri-Robins, K., Terrill, R. D., & Lindsey, D. B. (2019). *Cultural proficiency: A manual for school leaders*. Thousand Oaks, CA: Corwin Press.

Nava-Landeros, I., Isken, J. & Francois, A. (2020). *Open the door to diversity: Teacher residencies in urban schools boost retention and achievement*. *Learning Forward* 41(6). pp. 33-36.

NEA Great Teaching and Learning report: <https://www.nea.org/sites/default/files/2020-06/Great%20Teaching%20and%20Learning%20Report.pdf>

Storeygard, J. & Mutch-Jones, K. (2021). *Pathway for paraeducators in math classrooms*. *Learning Forward* 41(6). pp. 38-42.

Tatum, D. T. (2017). *Why are all the black kids sitting together in the cafeteria?* New York, NY: Basic Books.

NEA has created several programs that align with building relationships and fostering practitioner leaders. Contact the Teacher Quality department for information and connections to these opportunities:

- NEA's Teacher Leader Institute, Early Leader Institute, and the TLI Competencies
- NEA's program - Leaders for Just Schools
NEA Center for Social Justice: <https://neacsjpd.org/https://neacsjpd.org/trainings/>
(Welcoming Schools can be found here)

See NEA's Leadership Competency framework: <https://www.nea.org/professional-excellence/leadership-development/leadership-competencies>

See the Teacher Leadership Competencies developed by NEA: <https://www.nea.org/professional-excellence/professional-learning/teachers/TLI>

Step 3b - Transforming Professional Practice

Individuals within schools and classrooms can transform their professional practice. Even better, the transformation of professional practice can be part of a transformation of the culture and norm of professional practice throughout an organization (using steps 1, 2, and 3a).

Overarching Resources—

National Education Association. (2017). ESP Professional growth continuum. Retrieved from: <https://www.nea.org/professional-excellence/professional-learning/esps/continuum>

National Education Association. (2017). Great teaching and learning: Creating the culture to support professional excellence. Retrieved from: <https://www.nea.org/resource-library/great-teaching-and-learning-creating-school-culture>

Over 170 NEA Micro-credentials — visit <https://nea.certificationbank.com/> or contact NEA Teacher Quality department for more information.

Brain-based practices—

Adams, M., Bell, L. A., Goodman, D. J. & Joshti, K. Y., eds. (2016). *Teaching for diversity and social justice*. New York, NY: Routledge.

Frey, N., Fisher, D., & Smith, D. (2019). *All learning is social and emotional: Helping students develop essential skills for the classroom and beyond*. Alexandria, VA: ASCD.

Hammond, Z. (2015). *Culturally responsive teaching and the brain*. Thousand Oaks, CA: Corwin Press.

Jensen, E. (1998). *Teaching with the brain in mind*. Alexandria, VA: ASCD.

McTighe, J. & Willis, J. (2019). *Upgrade your teaching: Understanding by design meets neuroscience*. Alexandria, VA: ASCD.

Nuri-Robins, K., Linsdey, D. B., Lindsey, R. B., & Terrell, R. D. (2012). *Culturally proficient instruction: A guide for people who teach*. Thousand Oaks, CA: Corwin Press.

Posey, A. (2018). *Engage the Brain: How to design for learning that taps into the power of emotion*. Alexandria, VA: ASCD.

Sousa, D. (2017). *How the brain learns*. Thousand Oaks, CA: Corwin Press.

Sprenger, M. (2020). *Social emotional learning and the brain: Strategies to help your students thrive*. Alexandria, VA: ASCD.

Tokuhamma-Espinosa, T. (2019). *Five pillars of the mind*. New York, NY: W. W. Norton.

Wolfe, P. (2001). *Brain matters: Translating research into classroom practice*. Alexandria, VA: ASCD.

Coaching and Mentoring—

Costa, A. L. & Garmston, R. J. (1994). *Cognitive coaching: A foundation for renaissance schools*. Norwood, MA: Christopher-Gordon Publishers, Inc.

Foster, E. (2020). *High-quality mentoring increases teacher effectiveness*. *Learning Forward* 41(6). Pp 15-17.

Knight, J. (2018). *The impact cycle: What instructional coaches should do to foster powerful improvements in teaching*. Thousand Oaks, CA: Corwin Press.

practical guide to learning-focused relationships. Charlotte, VT: MiraVia, LLC.

School Transformation—

Johnson, J. F., Uline, C. L., & Perez, L. G. (2019). *Teaching practices from America's best urban schools: A guide for school and classroom leaders*. New York, NY: Routledge.

Hopkins, B. (2004). *Just Schools: A whole school approach to restorative justice*. London, UK: Jessica Kingsley Publishers.

Jennings, P. A. (2020). *Mindfulness for teachers*. New York, NY: Norton Professional Books.

Restorative Practices—

Video Links:

NEA video (start at 2:35): https://www.youtube.com/watch?v=8HN_zW4SwYY

- An elementary example of Tier 1 use of Restorative Justice circles: <https://www.youtube.com/watch?v=qTr4v0eYigM>
A high school example of how students experience “The Zone” from Nashville and use of Restorative practices. Video: <https://www.youtube.com/watch?v=1-RZYSTJAAo>
- A powerful example of re-entry (Tier 3) from Oakland, CA
Video: <https://www.youtube.com/watch?v=uSJ2GPiptvc>
- Example from middle school including discipline data comparisons
<https://irjrd.org/wp-content/uploads/2016/01/RD-Handout-TASSP-TEPSA-June-2014.pdf>

Web Resources:

Ford, J. E. (2016). *Disrupting inequity. Educational leadership*. 74(3), pp. 42-46. Accessed at: <http://www.ascd.org/publications/educational-leadership/nov16/vol74/num03/The-Root-of-Discipline-Disparities.aspx>

Balingit, M. (2018). Racial disparities in school discipline are growing, federal data show. *The Washington Post*. April 24, 2018. Accessed at: https://www.washingtonpost.com/local/education/racial-disparities-in-school-discipline-are-growing-federal-data-shows/2018/04/24/67b5d2b8-47e4-11e8-827e-190efaf1f1ee_story.html?utm_term=.87f17342dc49

Institute for Restorative Justice and Restorative Dialogue. Website: <https://irjrd.org>
See their “best practices” document at: <https://irjrd.org/wp-content/uploads/2016/01/Best-PracticesI.pdf>

Denver Restorative Practices school based partnership (including NEA, NCTA, and community and district partners). See the *School-wide restorative practices: Step-by-step* accessed at: <http://educationvotes.nea.org/wp-content/uploads/2017/09/Implementation-Guide-2017-FINAL.pdf>

NEA five-micro-credential stack introducing restorative practices:

<https://www.nea.org/professional-excellence/professional-learning/resources/restorative-practices-micro-credentials>

NEA Community Schools Toolkit (pp. 58-59): <http://www.nea.org/assets/docs/Comm%20Schools%20ToolKit-final%20digi-web-72617.pdf>

Thorsborne, M. & Blood, P. (2013). *Implementing Restorative Practices in Schools: A practical guide to transforming school communities*. London, UK: Jessica Kingsley Publishers.

Additional Strategies—

Consider using the various books and articles cited in earlier sections for book-study groups. Specific strategies cited in the PSP 2021 report include creating “social justice movie nights” with follow-up conversations or book study groups.

Films for social justice movie nights:

- *Hair Love* (2019). Accessed at: https://www.youtube.com/watch?v=kNw8V_Fkw28
- *13th* (2016) produced by *Netflix*. Accessible online at: <https://www.youtube.com/watch?v=krfcq5pF8u8>
- *Freedom Writers* (2007). In addition to watching the feature movie, see Erin Gruwell’s foundation website at: <http://www.freedomwritersfoundation.org/>
- *Just Mercy* (2019). Learn more about the film at the Equal Justice Institute website at: <https://justmercy.eji.org/>
- *The Hate U Give* (2018). Access the full-length film at: <https://www.youtube.com/watch?v=NXy0H-EZR5s>
- *Selma* (2014). See additional information at the IMDB website: <https://www.imdb.com/title/tt1020072/>
- *If Beale Street Could Talk* (2018). Find more information at Wikipedia: [https://en.wikipedia.org/wiki/If_Beale_Street_Could_Talk_\(film\)](https://en.wikipedia.org/wiki/If_Beale_Street_Could_Talk_(film))
- *Fruitvale Station* (2013). Learn more about the film at: <https://www.imdb.com/title/tt2334649/>
- *Do the Right Thing* (1989). See more information at IMDB: <https://www.imdb.com/title/tt0097216/>
- *12 Years a Slave* (2013). See more information at: [https://en.wikipedia.org/wiki/12_Years_a_Slave_\(film\)](https://en.wikipedia.org/wiki/12_Years_a_Slave_(film))
- *I Am Not Your Negro* (2017). Learn about this Netflix project at: <https://www.netflix.com/title/80144402>
- A website introducing 15 potential movies for events such as described above can be found at: <https://www.cinemablend.com/news/2547580/great-movies-that-explore-race-and-social-justice>

Discussion activities and selections from Aspiring Educators resources and other affiliates:

Baltimore Rising

Baltimore Rising chronicles the determined efforts of people on all sides who fight for justice and work to make their city better, sometimes coming together in unexpected ways, discovering a common humanity where before they often saw each other only as adversaries. Follow activists, police officers, community leaders and gang affiliates, who struggle to hold Baltimore together, even as the homicide rate hits record levels, and explore how to make change when change is hard.

Trailer: <https://www.youtube.com/watch?v=9t87jLeOzPI>
Website: <https://www.hbo.com/documentaries/baltimore-rising>

I Am From Here

(created with an NEA grant by Vermont NEA)
“I am from here,” a 30-minute instructional film directed and produced by Bess O’Brien, for Vermont NEA. The film interviews numerous students of color in the Vermont public school system and documents their personal experiences. It is important that anyone working with students understand the experiences of students of color as they navigate through the public education system.

Trailer: there is not a trailer for this film, but you can watch the first 3-4 minutes of the film as a preview
Website: <http://www.racialequityvtnea.org/watch-now-video/>

Latinos Beyond Reel

In *Latinos Beyond Reel*, filmmakers examine how US news and entertainment media portray—and do not portray—Latinos. The film challenges viewers to think critically about the wide-ranging effects of these media stereotypes, and to envision alternative representations and models of production more capable of capturing the humanity and diversity of real Latinos.

Trailer: <https://www.youtube.com/watch?v=tVr2oR9B2jE>

Website: <https://www.kanopy.com/product/latinos-beyond-reel>

Sexual Orientation and Gender Identity

COMMITTEE MEMBERS

Saul Ramos, *Chair*
Worcester, MA

Chelsie Acosta
Salt Lake City, UT

Karen Barnes- Ullrich
Leander, TX

Anthony Beckett
Charlotte, NC

Alyson Brauning
Vacaville, CA

Desiree Breckenridge- Barnes
Buffalo, NY

Lindsay Buck
Lawrence, KS

William Farmer
Chicago, IL

David Fernkopf
Auburn, KS

Jaim Foster
Arlington, VA

Chad Jimison
Korea, FEA

Alexander Joos
Rochester, MN

Samuel Long
Westminster, CO

Scott Miller
Orange, CA

Emilly Osterling
Garner, NC

Braydon (Kaleo) Ramos
Kaneohe, HI

Bobby Travers
Cambridge, MA

Emerson Stamper
Goshen, KY

Hanna Vaandering
Executive Committee Liaison
Riverside, CA

Staff Liaisons:
Anthony Brisson
Hilario Benzon

Charge 1

Assist in the development and execution of webinars/video conference/virtual engagements and resources that address current needs of the LGBTQ students and staff.

Committee Discussion:

The role of the NEA SOGI Committee has and continues to evolve. When presented with this charge, the committee needed clarification regarding how involved the NEA SOGI Committee could be in the development of materials and resources. The subcommittee discussed the following with the SOGI chair, Executive Committee liaison, and NEA staff and received information on NEA processes and operations in order to help “develop” and “execute” engagements and resources:

- The timeline for presenting webinars, video conferences, etc.
- NEA’s partnerships and what those partnerships entail.
- Where webinars, video conferences, and other resources will be housed for future access.
- How to identify successful GSA clubs to ask advisors to virtually share their advice/experiences for possible future events.
- Adapting resources based upon geographical location since some areas of the country are more progressive and accepting than others.

The subcommittee identified the following themes/actions for Charge 1 to be successfully implemented and sustained:

- Effective utilization of partnerships- communication on the purpose of the partnership.
- Communication - website navigation, social media,

resource directory, refer to SOGI archives.

- The need for a 21st century organization: cultural competence, intentionality, creativity, SEL, equity.

Recommendations:

1. NEA should, in conjunction with the NEA SOGI Committee, develop quarterly webinar topics based on the common themes and questions found within the SOGI Hearing forms.
2. NEA should, with the support of the NEA SOGI Committee, partner with the NEA LGBTQ+ Caucus, to promote the NEA LGBTQ+ Caucus Rainbow Series.
3. NEA should provide the NEA SOGI Committee with quarterly updates regarding external partnerships with LGBTQ+ community organizations.
4. NEA should provide data driven quarterly updates on the ongoing development of the NEA LGBTQ+ Resource page in order for the NEA SOGI Committee to provide updates on the NEA LGBTQ+ Resource page on the NEA.org website.
5. NEA should add a plus(+) to LGBTQ on all communications, including, but not limited to, committee charges, emails, resources, social media platforms, etc.

Charge 2

Assist in the development of resources regarding supports needed to address the suicide rate within the LGBTQ community, especially our students.

Committee Discussion:

The NEA SOGI Committee took direct and deliberative action regarding the charge to develop resources and supports needed to address the suicide rate within the

LGBTQ+ community, especially our students. We identified several LGBTQ+ organizations such as The Trevor Project, HRC, GLSEN, GLAAD, etc. that are current partners of the NEA and how they can be leveraged to educate our NEA members.

While researching the topic of LGBTQ+ youth suicide, it became apparent that educators are often unaware of the impact of “coming out” has on LGBTQ+ youth. According to The Trevor Project, (the leading national organization providing crisis intervention and suicide prevention services to lesbian, gay, bisexual, transgender, queer & questioning youth):

- Suicide is the 2nd leading cause of death among young people ages 10 to 24.
- LGB youth seriously contemplate suicide at almost three times the rate of heterosexual youth.
- LGB youth are almost five times as likely to have attempted suicide compared to heterosexual youth.
- Of all the suicide attempts made by youth, LGB youth suicide attempts were almost five times as likely to require medical treatment than those of heterosexual youth.
- Suicide attempts by LGB youth and questioning youth are four to six times more likely to result in injury, poisoning, or overdose that requires treatment from a doctor or nurse, compared to their straight peers.
- In a national study, 40 percent of transgender adults reported having made a suicide attempt. 92 percent of these individuals reported having attempted suicide before the age of 25.
- LGB youth who come from highly rejecting families are 8.4 times as likely to have attempted suicide as LGB peers who reported no or low levels of family rejection.
- One out of six students nationwide (grades 9–12) seriously considered suicide in the past year.
- Each episode of LGBT victimization, such as physical or verbal harassment or abuse, increases the likelihood of self-harming behavior by 2.5 times on average.

(Source: [Facts About Suicide](#))

With the assistance of the NEA SOGI Committee, Center for Social Justice, and Communications, we believe that a quarterly social media campaign that highlights some of the above statistics and ways to access our partnerships would help our members to become more aware of issues around LGBTQ+ youth suicide. NEA Communications has already set the stage for this type of a campaign with its article about LGBTQ+ suicide and prevention in the January 2020 NEA Today. The SOGI Committee believes that such a campaign could be as simple as creating a static “slide” that can be published in future magazines or uploaded to various NEA social media platforms.

Recommendations:

NEA should, in partnership with the Trevor Project, develop a social media slide campaign in conjunction with the NEA SOGI Committee that addresses the disparate suicide rates and suicide prevention within the LGBTQ+ community, especially our students during, but not limited to: Suicide Awareness Month, Trans Visibility Day, National Coming Out Day, National Day of Silence, etc.

Charge 3

Review input from the SOGI hearing and identify the broad themes that will help inform implementation of NEA’s Strategic Objectives.

Committee Discussion:

The NEA SOGI Committee received the input from the hearing forms prior to a virtual meeting regarding work completed for each charge. The input was reviewed and summarized into broad themes in order to develop the following recommendations.

Recommendations:

1. NEA should include intersectionality as a priority in all their conferences, resources, materials, NEA Today, website(s), social media, committee charges, etc.
2. NEA should create a direct communication strategy with LGBTQ+ state committees, task forces, groups, etc. and connect them for resource sharing, partnerships, collaborations, campaign planning, organizing issues, etc.

Charge 4

Identify current school board policies, resolutions, and other governing documents that schools are implementing as a result of the recent LGBTQ SCOTUS decision.

Committee Discussion:

The way that this particular charge was worded provided a relatively narrow scope for NEA SOGI to identify examples of school board policies, resolutions, and other governing documents that have been implemented as a result of the *Bostock vs. Clayton County Supreme Court* decision.

Through the subcommittee’s research for this charge, they were unable to identify clear examples of local or state policy changes adopted in response to the SCOTUS decision. The subcommittee attributes this to the fact that the decision occurred in June 2020 when most things were overshadowed by more pressing issues including the COVID-19 pandemic, racial injustices across the country, and the presidential election.

During the subcommittee’s research, they did identify some existing resources that were created prior to the SCOTUS decision that would still fulfill the intent of the charge. With the Biden/Harris administration, we are also seeing more federal protections emerge with respect to LGBTQ+ equality, so we anticipate that information will continue to evolve and it will be important to support the adoption of more robust and inclusive policies at the state and local level.

The landscape of LGBTQ+ rights is variable from state to state. For many states, the decision represented significant progress in the fight for equality for LGBTQ+ Americans. Several other states have existing laws that extend protections well beyond the SCOTUS decision.

For states with few existing state or local protections, we would highlight Olathe Public Schools in Kansas with the inclusion of gender identity and sexual orientation in their non-discrimination policies. This would be an important first step for many local and state agencies in

response to the SCOTUS decision. Aspirationally, we included some example policies from California, Illinois, and Canada as examples of the direction we need to continue moving in.

NEA and some of our partner organizations, like GLSEN, already have some helpful model resolution and policy documents that local and state entities can use to create more expansive and inclusive policies to support LGBTQ+ people.

In the subcommittee discussions, it was recognized that model policies and resolutions are a good first step, but more action will be needed to actually support the successful implementation of better local policies and state laws. SOGI hopes that this charge can be revised for future years so that SOGI can work towards organizing around these necessary changes by identifying effective strategies to get policies changed and updated.

There was also acknowledgement that this work should extend to state and local affiliates with the support of NEA. Some state and local affiliates have been very active with supporting the implementation of LGBTQ+ policies. SOGI would like to see this replicated in other affiliates.

Recommendations:

NEA should publish, promote and disseminate the following resources to our members, affiliates, and partners through multiple social media platforms, including but not limited to the LGBTQ+ Resource page on the NEA.org website:

- School Board Resolutions
 - [NEA sample board resolution](#)
- Model policy resources for state departments of education and local school districts
 - [GLSEN model district policies](#)
 - [Gender Inclusive Schools](#) - state-by-state map of policy guidance for transgender and gender non-conforming students
 - Schools In Transition (In the process of being updated)
 - Expanding Non-Discrimination Policies to include Gender Identity and Sexual Orientation
 - Kansas - [Olathe Public Schools](#) (2019)
 - Comprehensive District policies for transgender and gender non-conforming students/staff:
 - California - [Los Angeles Unified School District](#)
 - Illinois - [Chicago Public Schools](#) (2016),

- [Harlem School District 122](#) (2020),
- [Berwyn South School District 100](#) (2015),
- [Evanston Township High School District 202](#) (2017), [Evanston District 65](#) (2020)
- Canada - [Toronto District School Board](#)

- State-specific LGBTQ survey data, to be used for state-level advocacy - [National Data HRC 2018 Youth Report](#)
 - [GLSEN survey state-by-state snapshots](#)
- Relevant state laws (check both education-specific law and employment law that affects LGBTQ school staff). Include both pro-LGBTQ and anti-LGBTQ laws e.g. No Promo Homo laws.
 - [No Promo Homo laws \(anti-LGBTQ\)](#)
 - [Colorado “Right to be Out” rule](#)
- Where you should be looking for these things in your state since policies are always changing
 - [Lambda Legal “In Your State Map” Workplace Rights](#)
- NEA should create a legal brief summarizing the impact of SCOTUS decision and the recent DOJ announcement on students and school employees. “Know Your Rights”

Charge 5

Provide input to the Conference on Racial and Social Justice Planning Team through the SOGI Chair.

Committee Discussion:

The NEA SOGI Committee discussed past NEA Conferences on Racial and Social Justice. The SOGI Chair also expressed the importance of intersectionality among the conference presenters, speakers, and performers chosen for the conference. NEA staff informed the SOGI Committee during a virtual call about potential pride month events that the committee can help spearhead. As more information becomes available, NEA staff will inform the committee.

Recommendations:

1. NEA should accept at least 3 topics suggested by the NEA SOGI Committee to be presented at the Conference on Racial & Social Justice.
2. NEA should ensure an intersectional lens is used in the planning and implementation of the conference, with the representation of LGBTQ+ and gender individuals/communities, specifically with a powerful representation of Trans Folx of color who should be centered in the conversation.

| Committee Recommendations | Board of Directors Action |
|--|--|
| Charge 1: <i>Assist in the development and execution of webinars/video conference/virtual engagements and resources that address current needs of the LGBTQ students and staff.</i> | |
| 1. NEA should, in conjunction with the NEA SOGI Committee, develop quarterly webinar topics based on the common themes and questions found within the SOGI Hearing forms. | Adopt |
| 2. NEA should, with the support of the NEA SOGI Committee, partner with the NEA LGBTQ+ Caucus, to promote the NEA LGBTQ+ Caucus Rainbow Series. | Refer to President/ Executive Director |
| 3. NEA should provide the NEA SOGI Committee with quarterly updates regarding external partnerships with LGBTQ+ community organizations. | Adopt |
| 4. NEA should provide data driven quarterly updates on the ongoing development of the NEA LGBTQ+ Resource page in order for the NEA SOGI Committee to provide updates on the NEA LGBTQ+ Resource page on the NEA.org website. | Adopt |
| 5. NEA should add a plus(+) to LGBTQ on all communications, including, but not limited to, committee charges, emails, resources, social media platforms, etc. | Adopt |
| Charge 2: <i>Assist in the development of resources regarding supports needed to address the suicide rate within the LGBTQ community, especially our students.</i> | |
| 6. NEA should, in partnership with the Trevor Project, develop a social media slide campaign in conjunction with the NEA SOGI Committee that addresses the disparate suicide rates and suicide prevention within the LGBTQ+ community, especially our students during, but not limited to: Suicide Awareness Month, Trans Visibility Day, National Coming Out Day, National Day of Silence, etc. | Adopt |
| Charge 3: <i>Review input from the SOGI hearing and identify the broad themes that will help inform implementation of NEA's Strategic Objectives.</i> | |
| 7. NEA should include intersectionality as a priority in all their conferences, resources, materials, NEA Today, website(s), social media, committee charges, etc. | Refer to President and Executive Director for implementation |
| 8. NEA should create a direct communication strategy with LGBTQ+ state committees, task forces, groups, etc. and connect them for resource sharing, partnerships, collaborations, campaign planning, organizing issues, etc. | Refer to President |
| Charge 4: <i>Identify current school board policies, resolutions, and other governing documents that schools are implementing as a result of the recent LGBTQ SCOTUS decision.</i> | |
| 9. NEA should publish, promote and disseminate the following resources to our members, affiliates, and partners through multiple social media platforms, including but not limited to the LGBTQ+ Resource page on the NEA.org website: School Board Resolutions <ul style="list-style-type: none"> ◦ NEA sample board resolution Model policy resources for state departments of education and local school districts <ul style="list-style-type: none"> ◦ GLSEN model district policies ◦ Gender Inclusive Schools - state-by-state map of policy guidance for transgender and gender non-conforming students | Adopt |

| | |
|--|------------------------------------|
| <ul style="list-style-type: none"> ◦ Schools In Transition (In the process of being updated) ◦ Expanding Non-Discrimination Policies to include Gender Identity and Sexual Orientation <ul style="list-style-type: none"> ◦ Kansas - Olathe Public Schools (2019) ◦ Comprehensive District policies for transgender and gender non-conforming students/staff: <ul style="list-style-type: none"> ◦ California - Los Angeles Unified School District ◦ Illinois - Chicago Public Schools (2016), Harlem School District 122 (2020), Berwyn South School District 100 (2015), Evanston Township High School District 202 (2017), Evanston District 65 (2020) ◦ Canada - Toronto District School Board ◦ State-specific LGBTQ survey data, to be used for state-level advocacy - National Data HRC 2018 Youth Report <ul style="list-style-type: none"> ◦ GLSEN survey state-by-state snapshots ◦ Relevant state laws (check both education-specific law and employment law that affects LGBTQ school staff). Include both pro-LGBTQ and anti-LGBTQ laws e.g. No Promo Homo laws <ul style="list-style-type: none"> ◦ No Promo Homo laws (anti-LGBTQ) ◦ Colorado “Right to be Out” rule ◦ Where you should be looking for these things in your state since policies are always changing <ul style="list-style-type: none"> ◦ Lambda Legal “In Your State Map” Workplace Rights | Adopt |
| <ol style="list-style-type: none"> 1. NEA should create a legal brief summarizing the impact of SCOTUS decision and the recent DOJ announcement on students and school employees. “Know Your Rights” | Adopt |
| <p>Charge 5: <i>Provide input to the Conference on Racial and Social Justice Planning Team through the SOGI Chair.</i></p> | |
| <ol style="list-style-type: none"> 2. NEA should accept at least 3 topics suggested by the NEA SOGI Committee to be presented at the Conference on Racial & Social Justice. | Refer to Conference Alignment Team |
| <ol style="list-style-type: none"> 3. NEA should ensure an intersectional lens is used in the planning and implementation of the conference, with the representation of LGBTQ+ and gender individuals/communities, specifically with a powerful representation of Trans Folx of color who should be centered in the conversation. | Refer to Conference Alignment Team |

Appendix: NEA SOGI Reflections

The SOGI Committee has met virtually several times for the 2020-21 year. Although several email communications were sent out since September, we did not officially meet until December. On December 9, 2020, the Chair met with the new committee members for an orientation/onboarding session. We went over the history of SOGI, expectations, charges (past three years & present), and answered any questions they had.

SOGI also had a two-day Team Building Session led by a third party. We met December 13 and 19, 2020. During these two days, SOGI members, along with our EC Liaison, and staff, participated in several activities and exercises. The intent of these sessions was to have SOGI members get to know each other better one-on-one, in small groups, and finally in the larger group. We also broke down all of this year's charges, explained their intent, and began a document where every one of the members was able to add any input they wanted to

each charge. This document stayed active and was used throughout the year as a reference for the work we did on the charges. The document was always available to members and they could add as much as they'd like at any time.

We had a meeting on January 31, 2021, to speak about the charges and ask members which charge they preferred to work on so we could create subcommittees, specifically for Charges 1, 2, & 4. Once the choices were sent, members were divided into three subcommittees. Three SOGI members were selected to each be the chair of one of these subcommittees. The subcommittees met on their own virtually and discussed further through emails and documents. We met with subcommittee chairs on March 24, 2021, to discuss and clarify any questions.

We met on April 6, 2021, as a whole for the subcommittees to present and discuss their work. We also discussed all 5 charges, which a final draft of recommendations was emailed to the committee for approval.

UniServ Advisory Committee

COMMITTEE MEMBERS

Brian Kerekes, *Chair*
Orlando, FL

Jeb Binns
Burien, WA

Larry Ellis
Lake Milton, OH

Mark Farr
Topeka, KS

Chris Finley
Fresno, CA

Keith Gambill
Indianapolis, IN

Carmen Hill
St. Louis, MO

Julie Horwin
Scottsdale, AZ

Amy Jensen
Wichita, KS

Deborah Jones
Ellenwood, GA

Sue McBride
Paterson, NJ

Brent McKim
Louisville, KY

Deanna Nicosia-Jones
Clayton, NJ

Shane Parmely
Bonita, CA

Aaron Phillips
Amarillo, TX

Tiffany Reed
Memphis, TN

Marty Scofield
Blaine, MN

Denise Sheehan
Dona Ana, NM

David Watts
Wood River, IL

Staff Liaisons:
Debra Abraham
Tom Israel

Charge 1

Report to the NEA Board of Directors on the structure, operation, and grants of the UniServ Program to ensure they are aligned to advance NEA's strategic objectives.

Committee discussion:

The committee has regularly reviewed financial reports on the UniServ Fund and programmatic reports on grants approved, the UniServ training program, and the demographics of the UniServ workforce. In February the Committee reported to the Board its preliminary recommendation of a grant amount of \$41,141 for the 2021-2022 fiscal year.

Recommendation:

The committee will finalize its recommendation on the 2021-2022 grant amount – and any possible 2020-2021 rebate - prior to the May Board meeting based on updated reporting on the UniServ Fund and affiliate requested grants for the coming year.

Charge 2

Work with the NEA Center for Organizing to review and provide input to the revision of the UniServ Core Competencies to embed NEA's commitment to racial justice.

Committee discussion:

The committee met with the Director of Human Civil Rights to review and develop input to the revisions of the Guidelines. Following a multi-stakeholder process, the Committee reviewed final recommended changes and voted to endorse the proposed revisions. The revised Guidelines have now been re-issued by the NEA Center for Organizing.

Charge 3

Develop recommendations on how NEA can support

affiliates in advancing the diversity in hiring goals established in the Guidelines (Section XII).

Committee discussion:

A subcommittee met with the NEA Director of Human Resources to discuss strategies for promoting diversity in the workforce. Following their report to, and discussion among the full Committee, the Committee voted to recommend:

Recommendation:

That NEA develop a “best practices” document on hiring for diversity to be shared with affiliates to assist in increasing the diversity of the UniServ workforce.

Charge 4

Consider revisions to the Dispute Resolution Procedure provisions in the Guidelines to incorporate criteria to be considered in the review process.

Committee discussion:

The committee met with the Center for Organizing to discuss the Dispute Resolution Process and the types of issues that occasionally arise. Input was sought from the NEA Office of General Counsel. The Committee drafted an amendment to the policy and voted to recommend:

Recommendation:

The recommended change is attached.

Charge 5

Consider whether or how surveying members can contribute to the UniServ Program assessment.

Committee discussion:

The committee met with members of the NEA Research Department and the Center for Organizing to review and

discuss the current UniServ Program assessment survey currently used to conduct a member survey for the program assessment that NEA is to conduct every six years. The committee made a number of recommendations for enhancing member feedback into the program assessment, including: if possible, having the survey emails sent from the state president, shortening the number of items being asked about on the survey, making sure the language is understandable, considering adding a question about how involved you are in the association, explaining

that “UniServ staff” operate under different job titles in some states, and sending the recipients an advance notice (ex. “We want your opinion”) and follow-up reminders to complete the survey.

Recommendation:

That the NEA Research Department and Center for Organizing develop the next iteration of the survey incorporating the feedback from the Committee.

| Committee Recommendations | Board of Directors Action |
|--|---------------------------|
| <i>Charge 3: Develop recommendations on how NEA can support affiliates in advancing the diversity in hiring goals established in the Guidelines (Section XII).</i> | |
| 1. That NEA develop a “best practices” document on hiring for diversity to be shared with affiliates to assist in increasing the diversity of the UniServ workforce. | Adopt |
| <i>Charge 4: Consider revisions to the Dispute Resolution Procedure provisions in the Guidelines to incorporate criteria to be considered in the review process</i> | |
| 2. That the Board of Directors approved the proposed revision to the UniServ Guidelines Dispute Resolutions provision (see below). | Adopt |
| <i>Charge 5: Consider whether or how surveying members can contribute to the UniServ Program assessment.</i> | |
| 3. That the NEA Research Department and Center for Organizing develop the next iteration of the survey incorporating the feedback from the Committee. | Adopt |

February 16, 2021
 UniServ Advisory Committee
 Recommended Amendment to the NEA UniServ Guidelines

NEA UniServ Guidelines
 Article XVIII – Dispute Resolution Procedure

Section A (1) b

- If, after exhausting the state affiliate’s Dispute Resolution Procedure, a local affiliate or local option UniServ council is dissatisfied with the resolution of the dispute, it may submit the dispute to the NEA Zone Director. If the NEA Zone Director is unable to resolve the dispute within twenty (20) days after such submission, the local affiliate or local option UniServ council may, within ten (10) days thereafter, submit the dispute to the NEA Executive Committee. The Executive Committee will consider whether the actions or decisions were arbitrary,

capricious, or in clear violation of these Guidelines and will take such action as it deems appropriate to resolve the dispute, including as may be appropriate the use of a committee of NEA, state affiliate, and/or local affiliate or local option UniServ council representatives. The decision of the Executive Committee will be final, provided that the Executive Committee will have no authority to require the state affiliate or local affiliate or local option UniServ council to take any action that is contrary to the UniServ Program Guidelines, the UniServ Program Administrative Agreement, or any other agreement between NEA and the state affiliate regarding the UniServ Program, or any collective bargaining or other employment agreement applying to UniServ staff members.

Women's Issues

COMMITTEE MEMBERS

| | | |
|---|--|--|
| Stephanie Johnson, <i>Chair</i> Columbia, SC | Virginia Mancini St. Louis Park, MN | Jamila Smith Kansas City, KS |
| Natalia Benjamin Rochester, MN | Renee Massado Wilmington, DE | Julie Wickersham Clarkston, WA |
| Zanovia Clark-Sevey Highland, WA | Franchesca Mejia Austin, TX | Kelly Givens <i>Aspiring Educator Representative</i> Morrilton, AR |
| Jamila Harris-Smith Kansas City, KS | Kizzy Nicholas State College, PA | Shelly Krajacic, Executive Committee Liaison Kenosha, WI |
| Fatimah Hayes Pennsauken, NJ | Marilyn O'Malley- Hicks Tacoma, WA | <i>Staff Liaisons:</i> Makeda Harris Carol Mwanthi Alexandria Richardson Pamela Rios |
| Maureen Honan North Haven, CT | Sara Pierre Beach Park, IL | |
| Lisa Jennings Sioux Falls, SD | Petra Schmid-Riggins Phoenix, AZ | |

The Women's Issues Committee met on March 6, 2021 for the entire day in addition to other brief meetings for the purpose of completing the four charges. The committee divided into subgroups for the purpose of completing the work of each of the charges, with the exception of charge 3, which was completed as a large group and used as guidance for the other three charges.

The subgroups utilized the following concepts and questions to guide their analysis of the charges: review last year's report as a starting place from which to build, as each of this year's charges are rooted in last year's work; generate new suggestions on how to we move this year's work forward and focus on what they could do in their small groups to complete the work tasks of this year.

Charge 1

Investigate the impediments for women and more specifically women of color with advancing to leadership roles within the NEA at all levels. Identify and/or develop promising solutions for dismantling those impediments.

The subgroup began by identifying the following as top impediments to the involvement of women and women of color specifically.

- A. Childcare and eldercare
- B. Lack of a family welcoming environment
- C. Competition for positions
- D. Lack of support to BIPOC women advancing racial justice work
- E. Division between membership categories
- F. Discrimination due to different abilities, neurodivergence, cultural bias, and use of multilingualism
- G. Perpetuation of a patriarchal hierarchy
- H. Lack of accountability regarding women issues

- I. Lack of accountability regarding representation in leadership

The subgroup began by creating a lengthy list of possible solutions to the identified impediments. However, the committee ultimately concluded that states needed to be encouraged to create and embed these structures through the development of a Women's Leadership Plan, which is explained in more detail below.

Additionally, the committee recommends that all NEA trainings for state and local affiliate presidents include the concepts recommended for states to consider in their Women's Leadership Plans as indicated in bullet f below.

Each state will create a Women's Leadership Plan for its state, similar to 3.1 (g) plans, for which the following are possible items for inclusion:

- a. Create **"best practices" for building women in leadership** guidance, such as: share the load with other leaders, foster collaboration, develop capacity within your organization, ensure representation among membership categories, attend trainings to develop an equity lens in leadership
- b. Provide **opportunities and guidelines for co-chairing** positions to increase women in leadership positions
- c. Develop **a women's mentorship program**, to include the following concepts:
 1. Mentor selection
 - i. Mentor - Should be in leadership and willing to serve (could be male or female)
 2. Membership access to mentorship program
 - i. Recruitment of new educators
 - ii. Recruitment of aspiring educators
 - iii. Recruitment of experienced educators not active

- in the association yet
- 3. Program:
 - i. Cohort groups for training future leaders
 - ii. Training for how to be a mentor
 - iii. Applications to be part of the mentorship/learning cohort
- 4. Possible funds to attend additional professional development and opportunities for networking as well as possible compensation for mentors
- d. Offer **Childcare** (or other/elder care) accessibility; create family-friendly environments
- e. **Balance member voices** to prevent division between membership categories.
- f. Ensure that **training in racial issues and women issues** is integral to leadership throughout the year at all levels of the association by providing **trainings** in:
 - I. Stereotype Threat <https://diversity.nih.gov/sociocultural-factors/stereotype-threat>
 - II. Implicit Bias and Microaggressions
 - III. Intersectionality
 - IV. Privilege and Fragility
 - V. History of language oppression and discrimination in education and how it shows up today
 - VI. How to respond to “call-ins” when change is needed
 - VII. Understanding women leadership styles
- g. Include information on the **percentage of women participation** in union activities, including BIPOC
- h. Include information on the **percentage of women in leadership**, including BIPOC

References:

https://download.ei-ie.org/Docs/WebDepot/EI_GEAP_2015_ENG_web.pdf

<https://www.ei-ie.org/en/detail/17146/new-zealand-trade-union-promotes-womens-leadership-in-the-education-sector>

<https://educationminnesota.org/EDMN/media/edmn-files/about/Committees/2018-10-3-Affirmative-Involvement-Plan.pdf>

Charge 2

Gather materials from NEA sources and external partners and compile into a document that can be shared with affiliates and members to help address sexual harassment and intimidation within the Association that impact women and girls, i.e. #MeToo.

The subcommittee began by determining that NEA governing documents might need some modifications. The committee did not have the time to study all governing documents, but is making some recommendations for modifications to the NEA Resolutions. The committee feels that the NEA language is vague and that there needs to be some common understanding of harassment and gender discrimination. This should include a clear transparent and systemic documentation and accountability process, for which the Standards of Conduct may be a start, but needs to filter to states and locals.

This subgroup spent a bulk of its time focused on the necessity of an internal audit to really determine gender bias and discrimination within the Association.

That internal audit should have the following goals and objectives:

- a. Achieve climate and culture shift from the white, patriarchal norms;
- b. Get input from women about their lived experience of sexual harassment and gender discrimination so the input can guide decision making, policy and practice;
- c. Be intentional about targeting groups who are under-represented (through coalition building, questions should be responsive to targeted groups, particularly BIPOC women);
- d. Take into consideration that women have been disproportionately negatively affected by COVID because of unpaid work and used sick leave for dependents.

Potential Questions for the Internal Audit:

1. Have you experienced intimidation or bullying because of gender within your local, state or national union?
2. Does your local or state affiliate have a clear plan for documenting incidents of sexual harassment and gender discrimination?
3. Do you know this plan?
4. When you come forward with issues of gender discrimination or sexual harassment, is it accepted and believed?
5. Do local or state leaders state code of conduct re: gender equity at the beginning of each meeting?
6. Does your union consider gender in delegating leadership positions?
7. Does your local seek out input specific to sexual harassment and gender discrimination from members?
8. Do you feel that you have not been encouraged to run for a position because of your gender?
9. Do you feel like your local supports women and women’s issues?
10. From whom have you experienced gender inequality/bias?
11. Do you feel your local leadership intentionally seeks the voices of all members, regardless of gender?
12. Do you feel your leadership practices inclusivity at all times regardless of gender?
13. When you attend union meetings or events, do you feel welcome?

Charge 3

Review input from WIC hearings and identify the broad themes that will help inform the implementation of NEA’s Strategic Objectives.

The committee reviewed the input from the WIC hearings and considered the hearing feedback in the development of the recommendations for the charges. It was noted that the hearing feedback is similar to what has been submitted in previous years. The committee also discussed the necessity of getting more participation in WIC hearings and the advantages of utilizing remote hearings or a hybrid option to engage more members.

Charge 4:

Provide input to the Racial and Social Justice Conference Planning Team through the WIC chair.

The subgroup made the following list of suggestions for

Chairwoman Johnson to bring forward to the planning committee and requests that the CRSJ planning committee would consider these concerns when reading the submissions from the call for presenters. The committee would like to see sessions within the Racial & Social Justice Conference that address these concerns.

For Aspiring Educators & Educators New to the Profession

1. As an Aspiring Educator or new to the profession, how do you report when faced with racial and social injustice? Who do you report to? What rights do you have? What recourse do you have?
2. As an Aspiring Educator or an educator new to the profession, how do you learn about Racial and Social Justice within education (introduction to the practices, protocols, 'norms'; i.e. land acknowledgments, preferred pronouns, terminology)?
3. NEA has provided Aspiring Educators and educators new to the profession with lots of resources- How do you navigate what to do with the information? How do you use the resources? How do you engage in hard conversations? Who do you rely on for support?
4. How do we monitor intent versus impact with Aspiring Educators and educators new to the profession in conference settings and workshops?
 - Providing mentorship programs around racial and social justice for Aspiring Educators and educators new to the profession.

Finally, the committee recommends two amendments to NEA Resolutions. The committee is proposing this language to address the climate and the culture within the

Association. Members do not necessarily know either how to see this climate or how to address it. This harassment is rarely overt, instead being relational in nature. The committee believes that these two Resolutions start the Association on the path to awareness, reconciliation, and eventual solutions.

Other Resolutions that may seem related, but the committee believes are not are as follows: Resolutions I-64 and I-65 are both external facing and I-64 has no mention of the involvement of women while I-65 limits that mention to the creation of a committee. There is no inclusion of harassment within the Association in either of these Resolutions. Resolution B is examining the systems in which educators work; it is therefore not examining the Association itself. Therefore, B-14 does not address the specific issues within the Association.

New J - Harassment

The Association believes that all members should have equitable access to full participation in the Association at all levels. That participation should be free of bullying or harassment from others including other members, leaders, or Association staff with awareness of prevailing privileges due to race, ethnicity, gender, gender expression, sexual orientation, religion, or elected or hired position.

New J - Gender Equity

The Association believes it is its responsibility to ensure the full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life for women and non-binary persons throughout all levels of the Association.

| Committee Recommendations | Board of Directors Action |
|---|---|
| <i>Charge 1: Investigate the impediments for women and more specifically women of color with advancing to leadership roles within the NEA at all levels. Identify and/or develop promising solutions for dismantling those impediments.</i> | |
| 1. That NEA request states begin systemically advancing women in leadership by creating Women’s Leadership Plans (similar to 3.1(g)) with an intentional opportunity to discuss best practices in this work and learn from each other. | Adopt |
| <i>Charge 2: Gather materials from NEA sources and external partners and compile into a document that can be shared with affiliates and members to help address sexual harassment and intimidation within the Association that impact women and girls, i.e. #MeToo.</i> | |
| 2. That the WIC committee be charged next year with a thorough evaluation of NEA documents to search for opportunities for women and necessary anti-harassment language (to include Resolutions, Legislative Agenda, Standard of Conduct). | Refer to President for potential inclusion in 2021-22 charges |
| 3. That NEA conduct an NEA Internal Audit of gender bias recognizing the possible points for consideration that are included in the committee report. | Refer to President and Executive Director |
| 4. That NEA complete implementation of adopted recommendations from 2019-2020 that were not completed this year. | Adopt |

| | |
|--|---------------------------|
| <p>5. That NEA make specific language change to the NEA Resolutions. These changes help to address and reflect the climate and culture surrounding women’s leadership across the organization and will lead to increased awareness, reconciliation and solution-building:</p> <p>New J - Harassment</p> <p>The Association believes that all members should have equitable access to full participation in the Association at all levels. That participation should be free of bullying or harassment from others including other members, leaders, or Association staff with awareness of prevailing privileges due to race, ethnicity, gender, gender expression, sexual orientation, religion, or elected or hired position.</p> <p>New J - Gender Equity</p> <p>The Association believes it is its responsibility to ensure the full and effective participation and equal opportunities for leadership at all levels of decision-making in political, economic and public life for women and non-binary persons throughout all levels of the Association.</p> | <p>Refer to President</p> |
|--|---------------------------|



Great Public Schools for Every Student