



Organizing *for* Change



A Road Map for Organizational Transformation and
Lessons Learned from the NEA Foundation's Initiative for
Building State Affiliate Capacity

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About the NEA Foundation's Building State Affiliate Capacity Initiative

The landscape of public education continues to change, with significant changes in the composition of the educator workforce and student demographics and a dynamic, global world that requires today's students to master 21st century skills. As the landscape shifts, so do the needs of the educators that NEA serves. The NEA Foundation's Building State Affiliate Capacity Initiative was launched in the fall of 2013 and supported four NEA state affiliates—Colorado, Kentucky, Illinois, and Utah—as they sought to expand their mission and role in a variety of ways. It was designed to test whether state affiliate influence and relevance to both its members and the broader educational community increased by expanding services and building skills in support of the professional needs of educators and their students.

About The NEA Foundation Reports and Issue Briefs

Occasional reports issued by the NEA Foundation provide in-depth coverage and analysis of innovations designed to increase teaching effectiveness and student achievement. Selected innovations are drawn mainly from the NEA Foundation program sites. Issue Briefs provide an engaging snapshot of impactful features of NEA Foundation's collaborative partnerships.

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Introduction

For the past several years, the NEA Foundation has worked with four state affiliates on transformational change in its *Building State Affiliate Capacity Initiative* — expanding processes and goals to focus on professional advocacy. This work stems from mounting evidence that expanded support on issues of teaching and learning is exactly what educators want and need from their unions.

This report outlines some of the strategies, challenges, and lessons learned from the union presidents, executive directors, and other leaders who have been involved in the Building State Affiliate Capacity initiative. The work has been challenging, and it has often taken longer than expected, but the end result has been organizations that are more focused on teaching and learning — and critically, more focused on their members in ways that ensure that they will remain relevant for years to come.

The Foundation's engagement with states arose following more than a decade of work with local affiliates across the country through its *Closing the Achievement Gaps Initiative* and *Institute for Innovation in Teaching and Learning*. After funding collaborative efforts between local union, district, and community leaders, the Foundation observed that there was rarely a partner in place to help sustain the work — and continue to support the union's engagement in teaching and learning issues — after Foundation funding ended. The state affiliate could play a critical role in both local districts and in helping to set policy statewide that would support their members and their students. With support from a grant from the Bill & Melinda Gates Foundation, the Building State Affiliate Capacity Initiative launched in 2013.

That emphasis on professional advocacy, the role that educator union locals and state affiliates can play in advancing teaching and learning along with traditional organizing issues, however, is far from new. Its roots extend back to Bob Chase's call for new unionism in the 1990s and to the broader labor movement that inspired it a decade earlier.¹

¹ Bob Chase, President of NEA 1996-2002: Higher Education and the New Unionism, *Thought and Action*, Spring 1997, accessed at http://www.nea.org/assets/img/PubThoughtAndAction/TAA_97Spr_01.pdf

But in a time of reduced resources for schools, attacks on both educators and the unions that support them, and a reform agenda that at times seems more focused on eroding teacher rights than improving student outcomes, it has been challenging for leaders to advance this idea in the face of constant challenges.

“It’s so easy to get distracted,” says Illinois Education Association (IEA) Executive Director Audrey Soglin. “We all have political issues, and it’s easy to go from one fire to another and forget that for our long-term survival, this kind of work is what’s going to save us.”

Each of the participating affiliates (CO, KY, IL, UT) is very different — in size, the number and nature of its own affiliates, and the political environment in which it operates. The challenges each face are very real—a fifth affiliate that initially joined the initiative had to disengage from the project in the face of dramatic changes in the political climate in its state, combined with the rigors of new leaders in the roles of both president and executive director. But in spite of equally daunting challenges on many fronts, each of the four remaining affiliates has made significant headway in providing the professional learning and resources its members say they need to help more students be successful in the classroom—and improving the climates in their states in the process.



And the work has had an impact. In Colorado, improved relationships and capacity building at the local level helped stem the tide of anti-education local school board elections last fall. In Utah, membership losses were first slowed, then reversed, with Utah Education Association (UEA) seeing net membership gains in fall 2015.

It hasn't been easy. Each affiliate has experienced resistance to change from staff, local leaders, and rank-and-file members. In many cases, that resistance has in part been justified by past initiatives that never gained traction. But out of their work, the affiliates have identified common challenges and strategies that, together, may provide a road map for other affiliates and locals to engage in transformational change.

The Need for That Change is Clear:

Members are Focused on Teaching and Learning

Three decades of polling has consistently confirmed that these issues matter to the vast majority of union members, including those who tend to be more focused on traditional organizing activities. Polling and surveys have also helped confirm the anecdotal observation that most traditional union activity is focused on the most active 10 to 20 percent of the membership.

An emphasis on professional development also may represent the best way of reaching out to new generations of teachers, who are committed to education but may not fully understand or believe in the need for traditional union protections. With other groups like TeachPlus and Center for Teaching Quality (CTQ) making direct inroads with teachers on issues related to the professionalism of the field, it's crucial to reinforce the union's role as a leader on issues of teaching and learning.

This Work is Vital Before — and After — the Political Climate Changes

Each of the affiliates participating in the initiative has faced political challenges. Several are in red states and have faced hostile environments in the state legislature or governor's mansion. All have seen a redoubled focus

on teaching and learning as helping mitigate attacks — and reinforcing coalitions of parents and business groups that have helped turn the tide. And with many cases similar to *Friedrichs v. California Teachers Association*² working their way through the courts with the potential to transform the union landscape, it will be critical for all unions to focus on these issues.

“Being relevant is the antidote to losing fair share” says IEA’s Soglin. “People will pay if they think there’s something of value.”

Advocacy and Organizing Aren’t an “Either-Or” Proposition.

No one is suggesting that affiliates and locals abandon their traditional — and vital — organizing role. In fact, working to ensure that educators and students are well served by new evaluation and assessment systems is a vital component of organizing that only unions can play.

The Nature of External Partners — and of Those Relationships — Continues to Evolve

It's no longer enough to reach out to traditional friends of education. Each of the participating affiliates has reached out to new — or traditionally unfriendly — stakeholders, including physicians groups, business organizations, and lawmakers who have not traditionally been supporters of educators or their unions. These coalitions may shift over time, and managing them requires a different approach than in the past.

“Organizing around teaching and learning is successful when we never forget that we’re not doing it alone,” says Lisa Nentl-Bloom, UEA’s executive director.

² http://www.supremecourt.gov/oral_arguments/argument_transcripts/14-915_e2p3.pdf





Getting Started

Persistence and Patience. Those are the two crucial elements for transformational change cited by leaders involved in the Building State Affiliate Capacity Initiative. Each of the four affiliates had different strategic goals and took different paths to organizational change, but common themes emerged about what's necessary to get started with this work — and to sustain change.

Visionary Leaders

Affiliates that engage deeply in this work are typically led by presidents or other leaders who came into governance with a desire — and a vision — for change. But that vision was honed and refined through communication with and participation from staff, local leaders, and members.

To develop consensus, for example, Kentucky Education Association (KEA) conducted member focus groups and online polls, and surveyed staff at all levels. It then brought drafts of its goals and objectives back to these stakeholders in an iterative process that led to the final versions. “People were appreciative of being asked, and endorsed the direction we were heading,” says executive director Mary Ann Blankenship.

Transparency

Leaders placed an emphasis on being clear about both their goals and the steps they were taking to reach them. When KEA received negative feedback from an all-staff meeting, for example, leaders were clear that they heard the concerns of staff, reported what they were, and took steps to address the concerns.

Working Groups

To broaden participation, affiliates created cross-functional working groups of affiliate staff to begin the work of rethinking the strategic and operational changes required to support teaching and learning.

A Strong Relationship Between the President and the Executive Director

Governance–staff divides must be bridged for transformation to become institutionalized, and this work begins with the relationship between the affiliate’s two top leaders.
(see sidebar on page 14).

Data

Quantitative and qualitative data, such as that gathered from member and staff surveys, is crucial for building the case for change. Leaders must reinforce data points to overcome resistance.

“People’s capacity for ignoring data never ceases to amaze me,” IEA’s Soglin says. “They have to hear it six, seven, eight times.”

Once data is in hand — and leaders may have to work closely with local presidents and UniServ staff to measure the impact of specific programs at the classroom level — it must also be used to make decisions about what work continues and what work is curtailed. “It’s hard to give up stuff,” says UEA’s Gallagher-Fishbaugh. “If something didn’t meet the goals, we took it off the plate.”

UniServ and Field Staff

Affiliate leaders must also ensure that field staff, whether part of the cooperative NEA Unified Staff Service Program (UniServ) or hired directly by the affiliate, are active participants in teaching and learning initiatives. As the people with the most influence at the local level, they have the strongest potential to move locals and their leaders. And, as with affiliate staffers and union members, field staff run the gamut from traditional unionists to those committed to professional issues, although through this work many are confronted with tasks far beyond their comfort zone.

“Many are or were attorneys and from other unions, and they’re really good at contracts,” says Dan Burkhalter, former Wisconsin Education Association Council (WEAC) executive director and current NEA Foundation project lead.

“They’re more uncomfortable about this other work,” he added. In several of the affiliates, consultants provided ongoing coaching to help staff better understand their new roles.

In local option states, where field staff typically work for a group of local unions combined into a region rather than reporting to the state union itself, this work is all the more critical, and it may involve building stronger relationships in the place of weak – or nonexistent – ones.

“You have to have conversations about the agenda, and what it would look like with their local,” says UEA’s President Sharon Gallagher-Fishbaugh. “Those relationships had to be in place in order for them to trust us and help us with the work.”

While local-option may make state union leaders feel like they are at a disadvantage, “one advantage is it forces you to think about what you’re doing — is it something members want?” says UEA’s Nentl-Bloom.



Outside Help

All four affiliates cited the value of outside consultants helping build capacity for organizational development. Along with facilitating meetings and helping develop new models for collaboration, consultants and facilitators gather and present data in an impartial way that can help build credibility.

In Utah, for example, an outside facilitator helped conduct a staff retreat to identify gaps in communicating with staff about how their roles would change.

“Having a third party helped us look at where the gaps were,” says Gallagher-Fishbaugh.



Communication

Each affiliate found a need for additional communication with staff, local leaders, and members, and evaluating outreach efforts was a critical first step. For example, while all four affiliates had a presence on social media, research revealed that only a small percentage of their membership was engaged with them on platforms like Facebook.

New approaches to outreach can improve contact with individual members. IEA, for example, created IEA Connect, a centralized call center, to increase direct communication with individual members. Others are piloting the NEA 360 online organizing tool, and UEA found polling as a way to engage members. A survey on teacher supplies, for example, netted 3,000 responses.

Increased outreach can also build staff buy-in and support for a focus on teaching and learning issues. For example, as part of a training session, all KEA headquarters staff had one-on-one conversations with members.

"We've traditionally had a lot of contact with members who are very active in the organization and people with lots of needs," Blankenship says. "But we haven't had much contact with the 90 percent of the members in the middle. A lot of us came away realizing how committed those members are to their students. That really helped solidify that we need to be paying attention to this."

It can also create new opportunities for teachers to lead. In Utah, much of the UEA's new professional training is led by teachers identified by state and local leaders. A group of 15 educators, for example, came together to develop the affiliate's new curriculum for assessment literacy training.

Most importantly, "don't be afraid to listen to members," Nentl-Bloom says. "We started on this path because members talked to us about things we weren't doing."



A Road Map for Change

Once a vision of professional advocacy has been developed and communicated to staff and members, the hard work begins. For the affiliates participating in the Foundation initiative, that involved strategic and operational change. During a convening of affiliate work teams, this work was visualized as a series of concentric rings, each building on previous work and strengthening the affiliate and its locals.

📍 Step 1

Organizational health sits at the core of this work. All four affiliates began by looking at their own internal operations and relationships.

“You can’t move a change agenda unless you’re a relatively high functioning organization,” Burkhalter says. “Otherwise, it’s too hard to just do the existing work.”

Each affiliate benefited from working with an outside consultant to develop frameworks around organizational health and capacity. As part of the Foundation initiative, the Parthenon Group worked with affiliate leaders and staff to identify strengths, areas for development, and initial steps needed to move forward. An impartial outside perspective helped affiliate leaders better understand their greatest needs and prepare to look inward.

Step 2

As suggested earlier, that self-assessment ultimately must begin with two people — **the president and executive director**.

Are they on the same page in terms of the vision, mission, and goals? Do they have a strong working relationship? Can they work as a team to move the work forward? In some cases, leadership must change to meet changing priorities. In others, both leaders must learn to work together more effectively.

Step 3

Moving beyond these two, the next step is to improve the effectiveness of other members of governance and **affiliate managers and staff**, without whom the goals cannot be operationalized. Some affiliates, including KEA, worked to map their internal networks to identify key staff members and roles with large numbers of connections within and beyond the organization, then focused on these “gatekeepers” in organizational effectiveness efforts.

In Illinois, IEA created a new level of position between an associate and professional staff member. Called paraprofessionals, these staff positions provide opportunities for employees who want to grow and enhance service to members at a lower cost. Also, when a staff person leaves IEA, a survey is now sent out to all coworkers to determine if the role needs to change.

Step 4

The next step is to engage **UniServ and field staff** in the work. As previously stated, these roles are closest to locals and members, and they may not be closely connected to the work of the affiliate. “We have to make the case,” says UEA’s Nentl-Bloom. As a local option state, Utah affiliate leaders had to directly engage UniServ directors in the work by bringing them into conversations about the agenda and what they could do to support it.

The impact can be wide-ranging. In Illinois, where IEA has been working on organizational change for more than a decade, regional coordinating councils of UniServ directors have begun to help the UniServ team serving a particular region specialize in specific areas, such as professional learning. KEA realized that all field staff, not just UniServ directors, need to be engaged in the work.

“We’ve made a lot of efforts to make it clear that if we want a plan in a specific area of the state, it’s really the field staff team in the area who should develop it and have ownership,” says Blankenship.

Step 5

Engaging **local leaders** is the next step, and that often means closer contact with local presidents. UEA meets with local presidents every month, during which affiliate leaders share what's happening and listen to concerns voiced by locals. "Every single association should really think about this," says Gallagher-Fishbaugh, although the size and structure of each state's locals mean the tactics will vary. With more than 1,100 locals, that's more of a challenge in Illinois, for example. As IEA president, Cinda Klickna has made it a goal to have a personal phone conversation with each local president.

When reaching out to UniServ directors and local leaders, Colorado Education Association's (CEA) Bartels says what he calls "an open-hand policy" is critical.

"We keep holding out these resources, keep holding out these programs and opportunities for leaders and staff," he says. "Sometimes they take advantage of it and we move the needle a little more towards the critical mass of participation that we need. It's really a matter of keeping the door open."

Step 6

The final step is engaging with **external partners**. Participating affiliate leaders focused on the message that their organization was changing, and how these changes benefit teaching and learning, and the community as a whole. They also intensified outreach with nontraditional partners, including political opponents and groups like the chamber of commerce. Working with nontraditional partners requires constant change as agendas and priorities evolve, but it's critical to building a coalition that can speak to student and teacher needs with a larger voice.

"We find ourselves being that constant voice of concern, and when you're the only voice, people stop listening if you're not careful," Nentl-Bloom says.

Affiliate leaders should map out a network of potential external partners, including employers such as large manufacturers, community-based organizations such as Boys and Girls Clubs, and churches, universities, parent groups, and politicians. They can then sort these partners through a matrix that compares the potential impact of working with the partner and the effort required to prioritize their outreach efforts.

Finally, bear in mind that building new relationships takes time. In Utah, Gallagher-Fishbaugh worked for five years to bring the state Chamber of Commerce, which had been hostile to the UEA, into its coalition. Countless individual meetings with stakeholders focused on teaching and learning issues ultimately led the chamber president to call the union president "the kind of teacher I want my kids to have."





Next Steps

Once an affiliate and its locals are on the road to organizational change, the work doesn't end. Leaders must deliberately take steps to ensure that strategic goals are sustained over time.

Expand Governance Buy-In

Transformation can't be driven solely by the president and the executive director. In Kentucky, KEA has a committee made up of two officers, two National Education Association (NEA) directors, and an at-large ethnic minority member, which has had the added benefit of improving communication with governance at all levels. Through this effort, the engagement was deepened even further, to include regional and local presidents.

Identify Quick Wins

Shifting the overall focus of an affiliate might be akin to turning a freighter, but identifying specific initiatives to focus on provides an opportunity to maintain momentum. In Illinois, for example, the IEA Connect call center went from conception to operation in a matter of months.

Point to Successes

Once progress is made in one area, it's vital to communicate it to the membership. In particular, doing so can help demonstrate the value of the new focus to more resistant members. "Because the changes have been working, a lot of our members have become willing," Bartels says.

Broaden Participation in the Process as Quickly as Possible

Affiliate leaders stressed how important it was to bring staff members into the work early on in the process — particularly if their roles were going to change. "It's the role of governance to set the 'what,'" Gallagher-Fishbaugh says. "But bring your staff along as soon as you can and let them give you feedback."

Engage the Field

The field or UniServ staff remains a critical component to transforming the state affiliate's way of working and expanding its portfolio and influence. A clear and specific strategy for how to use the UniServ staff is a critical component of any transformation effort.

Repurpose Existing Activities

Doing new things with the same or fewer resources requires ingenuity and, in many cases, expanding the role or changing the content of existing activities. Map out all of the ways in which members are convened or engaged today. Identify activities (like the state Representative Assembly, summer leadership conference, or other regularly scheduled meetings) that can be reprogrammed to better serve a teaching and learning agenda – being sure to solicit feedback from attendees about the changes.

Measure Outcomes

It's critical to track the impact of efforts in ways that go beyond membership numbers. Particularly given the emphasis on student learning, affiliates must find ways to gauge whether initiatives have an impact on teaching, and by extension, learning. Do teachers report positive effects in the classroom? Do these initiatives have any impact on student learning? "It's very difficult to figure out mechanisms for measuring certain things," says Gallagher-Fishbaugh.



Use Your Local Presidents

In some cases, state affiliates did not have routine ways to engage their local presidents on issues of teaching and learning. These leaders are great partners to hone expanded programming to ensure that it meets member needs and to help disseminate information about new state affiliate presidents. Whether using existing regular meetings or creating new ones, finding time to engage and understand the needs of local presidents is critical.

Maintain Focus

"It's very easy to let this work be put on the back burner," cautions KEA's President Stephanie Winkler. One way to ensure that organizational change isn't overlooked is to appoint a "change czar," an affiliate staff member other than the president or executive director who can ensure that the ongoing work remains top of mind for governance and staff leadership.

Another key is for leadership to frame the importance of ongoing organizational change when circumstances change. For example, Kentucky's new governor brings new challenges for KEA, but the strategic plan's focus on membership and building strong locals has only become more relevant, according to Blankenship. "That's exactly the right emphasis, whether in survival mode or building mode," she says.

Ensure Continuity

It's vital to ensure that the strategic direction continues beyond the current slate of elected leaders. Enshrining the work in the affiliate's mission and goals creates the conditions for continuity, but in the face of leadership change, it is critical for a new president or executive director to work through the expectations and their role in continuing the work. Ensuring that staff members lower on the organizational chart are engaged and have specific roles also helps maintain continuity. And remember that continuity doesn't just involve affiliate staff — outreach when any local leader or UniServ director changes is also critical to ensure continuity where it matters most — at the level where unions touch individual members.

Prepare to be Patient

Expanding communication efforts and working with new external partners takes time, but is crucial to ensure that the process works. "Every time we don't do that, we're not as happy with the results," says Nentl-Bloom. "Remember to slow down and follow all the steps, because we'll have better results."

SIDEBAR:

The President and Executive Director Team

For transformational change to take place, the affiliate president and executive director must develop a relationship beyond the typical dynamic of governance setting direction and staff executing. “They have to look at governance and the management of staff in a collaborative way,” says IEA President Cinda Klickna. “They’re not separate.”

With or without the help of an outside facilitator, the affiliate’s two top leaders should establish norms on how they will work together. Some of the hallmarks of these relationships include constant communication, honest feedback, and frequent check-ins to ensure they are on the same page. Each position also has its own distinctive roles:

President

Focus on teaching and learning. Many affiliate presidents involved in the Foundation initiative came to office on a platform focused on teacher professionalism. Some came directly from the classroom. But all presidents must convey the importance of teaching and learning to build credibility for the affiliate’s efforts among internal and external stakeholders.

“You have to meet members where they are, in the classroom,” says UEA President Sharon Gallagher-Fishbaugh. “If you’re not spending time there, you’re not credible to them or any of your coalition members.”

Set the Vision. For KEA President Stephanie Winkler, creating a focus for the affiliate was challenging — but crucial. “It was important that we don’t make ourselves the ‘everything association,’ that we budget and prioritize and plan on exactly what it is we want to accomplish and not let things distract us from the goals,” she says.

Maintain Focus. When crises arise, it’s critical for the president to restate the importance of the overall strategic direction. “Things can explode, and the big problems you have to address while keeping your eye on the ball with the strategic planning work and articulating that this is relevant is key,” Winkler says.

“If you’ve done it well, those goals should last the test of time and support everything you do.”

Ensure other governance leaders are on board. Other members of governance need to be active and involved participants in transformation efforts, but that may involve more direct communication. IEA’s Klickna recalls realizing how infrequently affiliate officers spoke to their presidents or executive directors.

Executive Director

Get up to speed on teaching and learning.

The backgrounds of some executives may be more focused on traditional union activities than the classroom, but they need a solid understanding of the goals set by governance. “Most execs know how to bargain and get an organizing plan,” says UEA Executive Director Lisa Nentl-Bloom. “Now they have to do organizational planning for teaching and learning for totally different reasons than prep time or salary.”

Bring staff along. Because of the traditional governance–staff firewall, it’s the executive director’s job both to communicate change to staff and to support them through the transition. “My role is to make sure the staff has the resources to do their work and to make sure they are interacting with each other,” says CEA Executive Director Brad Bartels.

Rethink staff roles — and their own roles as executive director. Execs have the responsibility to reorganize roles and responsibilities — including their own, since they now have to handle traditional administrative tasks while becoming more involved in teaching and learning issues.

“We have a tendency to overextend ourselves,” CEA’s Bartels says. “My job is to temper that and make sure we’re doing the utmost to ensure that existing initiatives are successful.”

Affiliate Profiles



**President
Executive Director**

**Cinda Klickna
Audrey Soglin**

Number of Locals

940

Number of Staff

212

Peeling Back the Layers of the Onion

One of the Illinois Education Association's strategic goals — improving the emotional and academic health of students — had its roots in a conversation at a family event.

IEA Executive Director Audrey Soglin talked to her brother, a physician, about challenges students with adverse childhood experiences (ACES) face in school and in life. What ultimately wound up coming out of that conversation was a collaboration that has brought together pediatricians, school districts, local union leaders, and UniServ directors, chambers of commerce, and other community groups.

In different locations across the state, locals have led public showings of Paper Tigers, a documentary about educating traumatized youth in a Washington alternative school, that have led to deeper conversations about students' emotional needs. As many as 500 people have attended these local screenings, which have led to deeper partnerships that can address student needs, according to IEA President Cinda Klickna.

"It's not just to show the documentary. It's not just to continue the understanding of how childhood trauma affects students' behaviors. It's also bringing together people with different perspectives and finding ways to build on that and collaborate...on what's needed," Klickna says.

Nearly 30 years ago, IEA began encouraging locals, superintendents, and school boards to work together through its Consortium for Education Change nonprofit. Klickna, who first started reaching out to community organizations when she was a local president, calls this strategy "peeling the layers of the onion."

"It's knowing the players out there who have the interest and being willing to go out and work with them," Klickna says. "It starts with something small until you have the whole thing opened up."



**President
Executive Director**

**Stephanie Winkler
Mary Ann Blankenship**

Number of Locals

334

Number of Staff

71

Putting the Pieces Together

When the Kentucky Education Association began working with the Building Affiliate Capacity Initiative, it had already gone through an extensive strategic planning process and was in the process of shifting from being the "Kentucky Everything Association" to focusing on teaching and learning. But something was missing.

“We hadn’t taken the step of how it all fits together,” says Executive Director Mary Ann Blankenship.

So KEA governance and leadership focused on operationalizing its strategic goals. That meant looking at how a quarter-century-old budgeting process didn’t reflect the organization’s new goals, as well as identifying a need for better communication among affiliate staff.

“We’ve articulated exactly what the vision is and what it means and how we need to go about and make sure to advance this work,” says KEA President Stephanie Winkler.

A new strategic plan, slated to be unveiled later this year, is the culmination of KEA’s ongoing efforts. Equally important, the process of developing and refining the plan set new expectations for how affiliate staff and governance can work together.

The board set direction and brought its vision to affiliate staff, which developed specific ideas. Those ideas were then brought back to the board, which provided feedback and helped shape the final plan. “It’s one of the first times in Kentucky where staff and governance were both really clear about their respective roles,” one affiliate staffer says.

In a local-option state where most local presidents do not have release time to attend statewide summits, that was a challenge.

“We felt if we could deepen our relationships with local association leaders and practice some distributive leadership, that would further our end goal,” says President Kerrie Dallman. “We needed to build structures to achieve that.”

One was COpilot, CEA’s online learning platform that allowed local leaders and members to engage in professional learning opportunities around teaching and learning issues. Next was an all-president summit that focused on a “two-way dialogue about our strategic needs,” Dallman says. More than a hundred presidents attended the first of these summits.

CEA is now focusing on grant-making to locals around teaching and learning initiatives, such as time to teach or lifting families out of poverty. Locals seeking grants have to create teams — helping distribute local leadership and building capacity beyond the president and officers. Grants are awarded on three tiers, based on the local’s capacity and need for support in developing strategic goals. “With the grants, locals are talking about distributed leadership and the training you need to give to those individuals,” Dallman says.

As a result of this work, several UniServ units have actually applied to become state-option units affiliated with CEA. And while not all locals are completely on board with the CEA’s focus on professional learning, even the most resistant ones now work more closely with the state affiliate on key issues. “Most of the local-option units are really hungry for the kind of professional development and member-oriented change work we’ve been doing,” says Executive Director Brad Bartels.

“When we went into this, we had to realize we had to go with the coalition of the willing,” Dallman says. “Not all of them have bought in, but all have been exposed to the work at a deeper level.”



COLORADO

**President
Executive Director**

**Kerrie Dallman
Brad Bartels**

Number of Locals

202

Number of Staff

92

INCLUDING
44 LOCAL
OPTION STAFF

Broadening the 'Coalition of the Willing'

Having reorganized the state affiliate to break down isolating internal silos, leaders at the Colorado Education Association turned their attention to building leadership capacity at the local level.



President

**Sharon
Gallagher-Fishbaugh**

Executive Director

Lisa Nentl-Bloom

Number of Locals

41

Number of Staff

44

INCLUDING
24 LOCAL
OPTION STAFF

Changing the Conversation

When Sharon Gallagher-Fishbaugh ran for president of UEA, chief among her concerns was the “vacuum of job-embedded professional development for teachers.” The former Utah Teacher of the Year had seen funding for National Board Certification cut by the state legislature and a lack of other options for educators.

“I recognized the association was the most organized structurally and had intimate contact with every single district and building,” Gallagher-Fishbaugh says. “We were the best vehicle and the most credible vehicle for getting that work out.”

Membership had been declining for several years, and Gallagher-Fishbaugh and other leaders entered the Building Affiliate Capacity work with a hypothesis: that focusing on teaching and learning would help reverse declining membership.

But UEA had a more immediate challenge. A conservative state senator was considering moving forward an anti-union bill sponsored by the American Legislative Executive Council (ALEC), a national nonprofit organization of conservative state legislators and private-sector members that drafts model legislation for use in state legislatures. At a time when animosity among state lawmakers was at a high point because of a previous legislative victory squelching vouchers, UEA saw an

opportunity to reach out.

Gallagher-Fishbaugh invited the lawmaker on a state-wide listening tour to hear teachers talk about what would make for an effective teacher evaluation framework. Along with being critical of more restrictive options, educators offered concrete suggestions about the proposed framework. The ALEC-sponsored bill was thrown out, and UEA became a credible partner that helped develop the state’s evaluation framework that, while not incorporating everything the union or its members wanted, clearly reflected their input. More importantly, it set the stage for UEA to begin more direct efforts around teaching and learning, including the creation of assessment literacy training and a teaching standards toolkit.

“The association had been about serving five percent of members while the other 95 percent did not see our relevance,” Gallagher-Fishbaugh says. “This was relevant to every single member...It’s taken five years, but we’re seeing that’s what matters for the majority of educators. They want an organization comprised of educators teaching educators based on what they know are best practices.”





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