

Leadership Development Case Study:
The 2015-2019 Restructuring of the Wisconsin Education Association Council
Summer Leadership Academy



INTRODUCTION

In 2015 the Wisconsin Education Association Council (WEAC) received a teacher leadership grant from the National Education Association (NEA) to underwrite their WEAC Summer Leadership Academy Retreat Project. The purpose of the project was to *help locals develop and keep strong leaders [emerging and established] by restructuring the Summer WEAC Leadership Academy*. Through this project WEAC was able to focus on providing a more in-depth leadership experience for its members.

This case study provides an overview of the process and tools WEAC utilized and developed to strengthen its Summer Leadership Academy as part of its strategic goal to build strong locals. This piece is not exhaustive in nature, but a snapshot intended to provide affiliates with an opportunity to reflect upon their own leadership development opportunities and to determine whether or not elements of the WEAC experience — including tools and templates — might apply to their context.

This case study consists of the following sections:

1. WEAC Context
2. Project Planning
3. Curriculum Writing
4. Implementation
5. Findings and Moving Forward
6. Appendices
 - Appendix A: Project Planning
 - Appendix B: Curriculum Writing

If you would like to learn more about the WEAC Summer Leadership Academy Retreat Project please contact leadersdevelop@nea.org.

A special thank you...

The NEA Leadership Development team would like to thank the Wisconsin Education Association Council (WEAC) for sharing its learnings and tools from this project.

1. WEAC CONTEXT

In 2011, the Wisconsin Education Association Council experienced a significant membership loss. For that reason, WEAC felt it was necessary to shift their thinking in how they planned and presented leadership development training. With their affiliate goal in mind – *to help locals develop and keep strong leaders* – and the enthusiastic support of their board of directors to utilize the NEA Leadership Competencies, WEAC embarked on a leadership development journey to restructure its annual Summer Leadership Academy. WEAC's hope was to

- Develop a strong, committed, and capable core group of trainers that possessed demonstrated knowledge, skills and abilities in leadership development from within the ranks of existing state and local leadership.
- Create an intensive multi-day outcome-based training, that required local affiliate teams to develop take-away plans for emerging and established leaders.
- Develop leadership skills focused on enhancing the quality of public education to assist in the development and implementation of a proactive agenda that engages members and leads to success for every student.
- Strengthen WEAC locals and by doing so strengthen WEAC and NEA.
- Develop plans to address membership growth and retention.
- Connect state officers in the plan through curriculum writing and follow-up with locals that participate in the training.
- Develop a system for succession planning for local associations

2. Questions and Important Considerations in Project Planning

- Ensure strong representation at the Summer Leadership Academy from locals across the state?**

-Talking points for contact from WEAC officers
-Local assessment tool with invitation to Summer Leadership Academy
-Priority Registration for engaged locals
-Follow-up emails and contact from WEAC officers
-Social media promotional pieces
-Trainer engagement with local leaders

- How do we recruit current established leaders to serve as trainers?**

-WEAC Officers identify strong leaders from locals
-Summer Leadership Academy Trainers identify strong leaders
-List of those suggested reviewed for engagement across entire state and in all membership categories
-Establish an application process for acceptance

- What is the role of the Executive Director in this project?**

-Oversee any intersection of staff with this project

- What is the role of the association officers in this project?**

-Support trainers and curriculum writing
-One officer serves as a project lead for the training
-Outreach to local leaders to attend
-Follow-up and mentorship with participating locals

- What project measurement and data should be considered?**

-Membership growth within participating locals
-WEAC officers engaged in locals across Wisconsin
-Survey participants at the conclusion of the training
-Follow-up mentorship with WEAC officers (divide locals by 3 officers)
-Number of returning locals for continued training

- What needs to be considered before developing the curriculum modules?**

-What other states have utilized the NEA Leadership Competencies for training?
-What resources can be applied to this training?
-Trainer knowledge of the 6 NEA Competencies
-Consider templates for lesson plans
-Continuity within the competencies for Levels 1, 2, 3

3. CURRICULUM WRITING

In advance of the 2015 Summer Leadership Academy, WEAC organized a two-day retreat designed to bring together teams – a cadre of twenty-six established leaders - to plan and write curriculum modules, as well as prepare to deliver the content as trainers. Leaders who were interested in acting as trainers were asked to submit an application to the WEAC Executive Office.

The modules – designed to be implemented during the Summer Leadership Academy – were guided by the NEA Leadership Competencies and intended for emerging and established leaders. As a result of the planning meeting, a competency-based lesson plan template and lessons were developed (available in Appendix B: Curriculum Writing).

Following the planning retreat, each team was assigned one lead who organized follow-up to ensure that:

1. Curriculum logistics were established
2. Each team member knew their roles during training
3. Training team was prepared with materials

There are six NEA Leadership Competencies, they are: Advocacy, Communication, Governance and Leadership, Leading Our Professions, Organizing, and Strategy and Fiscal Health. To download the NEA Leadership Competencies Guide please visit www.nea.org/leadershipdevelopment.

The 2015 retreat and subsequent conference call amounted to approximately 12 hours of curriculum planning and writing.

Templates specific to this section are available in Appendix B: Curriculum Writing, they include:

- Trainer and Curriculum Writer Application
- Lesson Plan Template
- Lesson Plan Sample – Leadership and Governance

We continue to hold to this model of meeting face to face with our trainers to begin the process of planning, curriculum writing, and revision for roughly 12 hours of planning. In 2018, WEAC developed a Level 2 (Mobilizing and Power Building) training strand and in 2019, we added Level 3 (Agenda Driving) training. We offer an optional second day for meeting with training teams as well as an opportunity for video conference calls for each competency team. Training teams for each competency are comprised of 3 local leaders, and each training team trains at both Level 1 (Foundational) and Level 2 (Mobilizing and Power Building). In our effort to maintain consistency from year-to-year, all training teams have at least one member from the previous year as part of its core group.

4. IMPLEMENTATION

The 2015 Level 1: Foundational Summer Leadership Academy was a four-day training— facilitated by the curriculum writers and trainers —and consisted of fifty WEAC emerging and established leaders. The Academy participants experienced a series of training sessions, whole-group presentations and discussions, and networking opportunities. The participants were divided into two groups — “A” and “B” — to experience the training sessions. See Appendix A for a sample schedule of the 2015 event.

Following the Summer Leadership Academy, trainers reconvened to share their experiences, consider input from participants and others, and to make changes to their curriculum and delivery approach.

Based upon participant and trainer feedback, the four-day experience was overwhelming for both the trainers and the participants. A shortened schedule of a two-and-a-half-day training was developed. See Appendix A for a sample of the two-and-a-half-day training.

Additionally, when Level 2 (Mobilizing and Power Building) and Level 3 (Agenda Driving) were created, intense consideration was given to the appropriate length of the training modules. See Appendix A for sample schedules for Level 2 and Level 3. A smaller trainer cadre was also created with teams of three trainers facilitating each of the six NEA Competencies (18 trainers) for Levels 1 and Level 2.

A Summer Leadership Academy Planning Committee was created in 2018 to ensure that trainer voices were reflected in the continued evolution of this training program. This committee works in conjunction with the WEAC officer lead and deeply reflects upon participant evaluations as well as trainer feedback and has been conscious of allowing for reflective time and space in the schedule.

5. FINDINGS AND MOVING FORWARD

As a result of this project, 50 WEAC members participated in the 2015 Summer Leadership Academy. All participants received certificates of completion in basic NEA Leadership Competencies, departed with plans for their locals to be executed in the subsequent school year, and all were connected with a state officer for follow up and support throughout the year. Participant feedback indicated the following:

- This approach to leadership development is a marked departure from past leadership summits
- Training teams were balanced to reflect leaders from all sizes and backgrounds of locals
- The size of the training cadre was ideal for one-on-one attention between trainers and participants, as well as to enable small-group planning
- Participants should be made aware of the level of engagement and hands-on work it requires
- Local leaders need help on the front-end in mapping and building a team to participate
- Two academies should be considered, one for teams of 2+ leaders and one for individuals

Overall, three preliminary successes in the area of leadership development were realized from the 2015 Summer Leadership Academy.

1. **Making it real.** WEAC's Summer Leadership Academy is Member-Led and Member-Driven as it engaged local leaders in writing a curriculum for the NEA Leadership Competencies. This enabled staff and local leaders to collaborate to ensure that the lessons and expected outcomes were related to the life experiences of WEAC educators. Trainers are peers sharing success stories from their own local affiliates.
2. **Putting it in action.** Participants came together to create plans tailored to local affiliate needs and issues that they could take-away from the conference. Each emerging leader now has a specific, measurable, attainable, realistic and timely plan of action incorporating the NEA Leadership Competencies.
3. **Building relevant relations.** WEAC state officers are now connected to a base of emerging local leaders and are committed to maintaining that relationship. State officers continue to grow their own leadership acumen which enable them to serve as mentors, gauge movement on the plans, celebrate successes on the statewide or national levels, and offering help when problems arise.

In 2019, our program continues to evolve, and that is why we have been successful. There are several important takeaways for state leaders looking to implement a similar model to training.

1. **A solid planning template** will help to ensure a strong outcome for participants. See Appendix B: Curriculum Planning for a sample documents by level. It's best to make participants aware of this document at the start of the training so that they can start planning right away.
2. **Coordination between staff and leaders** is essential in signing up local leaders to attend the training. The stronger the relationship with the state organization and the locals, the more buy-in that will occur about this approach to training. There is potential to offer these training modules separately across the state as well—but this hasn't been realized as of 2019.
3. **Starting small will build to success of the program:** By focusing on quality and starting small, we've been able to consistently grow our Summer Leadership Academy. Successes can be measured by the number of locals who have attended Summer Leadership Academy and returned the following year. In 2019, WEAC had over 30 different local associations represented at the training with half of those attending this training a second or third time. Out of popularity of the program and requests

by attendees, we grew the program to offer a Level 2 (Mobilizing and Power Building) in 2018 and piloted Level 3 (Agenda Driving) in 2019.

WEAC's plans for the future of Summer Leadership Academy:

- Summer Leadership Academy 2020: Will incorporate Level 3 (Agenda Driving) as an option for our locals who have progressed through the program. A caveat for attending Level 3 is that a local brings a team of 2-5 members to attend level 1 Or level 1 and level 2 as a means for local succession planning. Teams will not be able to completely "self-select" level 3 training as they are able to do with level 1 & 2 given the knowledge, skills, and background required to engage in this level of the training.
- Continued mentorship between the state and the local affiliates is an important component of the program, especially in realizing true potential for growth and in strengthening local affiliates who participate. This is an area WEAC wishes to explore and understands that it will require further resources and partnerships across the NEA enterprise at the national, state and local levels.
- Wisconsin's Leaders for Just Schools: Equity Cohort was formed through NEA in February of 2018, and we offered a pilot of this training to run in conjunction to with our work in the Leadership Academy condensing the curriculum to fit the two-and-a-half-day time frame. Our goal was to advance this priority work of racial justice in education in Wisconsin and to bring a broader group of members together at the same time in the same location. We intend to continue this for our training in 2020.
- With trainers from all over Wisconsin, more localized fall, winter, and spring training opportunities for local leaders who haven't attended can be realized. These would have to exist in a shorter time frame. This is another area WEAC wishes to explore understanding that it will require further resources.

The NEA has a suite of leadership developments resources available to educators, these include:

- A self-assessment;
- Training Considerations; and
- Member leadership opportunities.

To access these and other resources, please visit www.nea.org/leadershipdevelopment.

6. APPENDICES

The appendices included in this case study are not intended to be exhaustive, however, they provide a picture of the tools and resources WEAC developed and used as part of their thinking as they shifted how they planned and presented leadership development training. With their affiliate goal in mind – to help locals develop and keep strong leaders.

Appendix A: Project Planning

Questions and Important Considerations

Ensure strong representation at the Summer Leadership Academy from locals across the state?

How do we recruit current established leaders to serve as trainers?

What is the role of the Executive Director in this project?

What is the role of the association officers in this project?

What project measurement and data should be considered?

What needs to be considered before developing the curriculum modules?

Local Identification — Selection of locals to participate in Association leadership opportunity

- Opportunity for membership growth and strength
- Recognition through local self-assessment need for training
- Connection to state affiliate officers or state/regional staff promoting event
- Willingness to attend state affiliate training & to create a plan to grow and strengthen

Sample talking points for inviting local affiliates to state Association leadership opportunity (2015)

- I'm calling to encourage and invite your local leadership to attend the [*insert title of leadership opportunity*].
- The focus for the [*insert title of leadership opportunity*] will be [*insert focus of leadership opportunity*].
- Your local has been identified as a local that we hope will participate. [*Insert state Association name*] will cover [*insert expenses that will be covered*].
- Our goal at [*insert state Association name and goal*]. We value the work leaders like you do on a day-to-day basis. We want to act as a support for you and your leadership team.
- Built within the training modules will be a plan to address membership growth and retention.
- Training will focus on the NEA Leadership Competencies (Advocacy, Strategy/Fiscal Health, Communication, Governance and Leadership, Leading Our Professions, and Organizing). Time will be spent learning the competencies and how they apply to you as a local leader. There will also be time spent with your team of local officers — we are hoping you would be able to bring a team of two to five (or more) members from your local. We have training, food, and fun all planned for this exciting event.
- Dates for the event are [*insert dates*] and will be held at [*insert location*]. This event will definitely be worth your time, and the best part is that [*insert state Association name*] will cover the expenses.
- I'd like to be able to connect with you face-to-face to talk more about this opportunity for your local. Can we set up a time — I'm able to come visit with you and perhaps other local leaders?

Outreach Contact Sheet Template

Local: _____

Name of Local Leader: _____

Phone Number: _____

| First Contact Phone | Second Contact Email and/or Phone | Third Contact Email and/or Phone |
|--|--|--|
| No answer, but left a message. | No answer, but left a message. | No answer, but left a message. |
| No answer and no way to leave a message — will email and call again. | No answer and no way to leave a message — will email and call again. | No answer and no way to leave a message — will email and call again. |
| Answered — set up a meeting. | Answered — set up a meeting. | Answered — set up a meeting. |
| Answered — not a leader anymore. | Answered — not a leader anymore. | Answered — not a leader anymore. |
| Answered — didn't seem receptive of the idea. | Answered — didn't seem receptive of the idea. | Answered — didn't seem receptive of the idea. |

Response:

Meeting set-up for: _____ (date) _____

(location, including address)

Will there be anyone else attending the meeting?

Locals Represented and Officer Assignment for mentorship

LOCAL/GROUP

OFFICER ASSIGNED

WEAC 2015 Four-Day Training Schedule

| Day | Activity |
|-----|---|
| 1 | <p>Registration/Welcome</p> <p>Training Session</p> <ul style="list-style-type: none"> • Group A: Module 1 – Advocacy • Group B: Module 2 – Business <p>Break</p> <p>Training Session</p> <ul style="list-style-type: none"> • Group A: Module 2 – Business • Group B: Module 1 – Advocacy <p>Break</p> <p>Dinner/Guest Speaker</p> <p>Networking Opportunity</p> |
| 2 | <p>Breakfast</p> <p>Training Session</p> <ul style="list-style-type: none"> • Group A: Module 3 – Communication • Group B: Module 4 – Governance & Leadership <p>Break</p> <p>Training Session</p> <ul style="list-style-type: none"> • Group A: Module 4 – Governance & Leadership • Group B: Module 3 – Communication <p>Lunch</p> <p>Training Session Membership</p> <p>Recreation Activity (6 groups formed)</p> <p>Dinner</p> <p>Film and Discussion</p> |
| 3 | <p>Breakfast</p> <p>Training Session</p> <ul style="list-style-type: none"> • Group A: Module 5 – Leading Our Professions • Group B: Module 6 – Organizing <p>Team Work--Local teams begin their “back-home plan”</p> <p>Lunch</p> <p>Training Session</p> <ul style="list-style-type: none"> • Group A: Module 6 – Organizing • Group B: Module 5 – Leading Our Professions <p>Break</p> <p>Team Work</p> <ul style="list-style-type: none"> • Local teams continue to develop their “back-home plan” <p>Dinner/Panel Discussion</p> <p>Networking Opportunity</p> |
| 4 | <p>Breakfast</p> <p>Team Work</p> <ul style="list-style-type: none"> • Local teams complete their “back-home plan” <p>Lunch</p> <p>Closing/Keynote Address</p> |

WEAC 2019 Two-and-a-half-day Schedule (Levels 1-2)

| DAY 1 - LEVEL 1 | DAY 1- LEVEL 2 |
|---|--|
| <p>9:00 - 10:00 Registration / Room check-in</p> <p>10:00 - 10:20 Welcome / Opening</p> <p>10:30 - 12:30 Leadership & Governance / Organizing (Group A)/(Group B)</p> <p>12:45 - 1:45 Lunch Keynote</p> <p>2:00 - 4:00 Leading Our Profession / Leadership & Governance (Group A / Group B)</p> <p>4:15 - 6:15 Organizing / Leading Our Profession (Group A)/(Group B)</p> <p>6:15 - 7:15 Dinner</p> <p>7:15 - Time on your own</p> | <p>9:00 - 10:00 Registration / Room check-in</p> <p>10:00 - 10:20 Welcome / Opening</p> <p>10:30 - 11:00 Overview of Competencies (Groups A & B)</p> <p>11:00-12:30 Local Assessment Tool (Groups A & B)</p> <p>12:45 - 1:45 Lunch Keynote</p> <p>2:00 - 3:30 Communication / Advocacy (Group A)/(Group B)</p> <p>3:45 - 5:15 Advocacy / Communication (Group B)/(Group A)</p> <p>5:15-6:15 Unconference</p> <p>6:15 - 7:15 Dinner</p> <p>7:15 - Time on your own</p> |
| DAY 2 - LEVEL 1 | DAY 2 - LEVEL 2 |
| <p>6:30 - 7:45 Breakfast</p> <p>8:00 - 10:00 Advocacy / Communication (Group A /(Group B)</p> <p>10:30 - 12:30 Communication / Advocacy (Group A)/(Group B)</p> <p>12:45 - 1:45 Lunch Keynote</p> <p>2:00 - 4:00 Fiscal Strategy & Health (Groups A & B)</p> <p>4:00-5:00 Unconference (Groups A & B)</p> <p>5:15-6:00 Local Level Advocacy (Groups A & B)</p> <p>6:00 - 7:00 Dinner</p> <p>7:00 - Time on your own</p> | <p>6:30- 7: 45 Breakfast</p> <p>8:00 - 10:00 Leadership & Governance (Group A) / Fiscal Strategy & Health (Group B)</p> <p>10:30 - 12:30 Strategy Fiscal Health (Group A)/Leadership & Governance (Group B)</p> <p>12:45 - 1:45 Lunch Keynote</p> <p>2:00 - 3:30 Leading Our Profession / Organizing (Group A)/(Group B)</p> <p>3:45 - 5:15 Organizing /Leading Our Profession (Group A)/(Group B)</p> <p>5:15-6:00 Local Planning Time</p> <p>6:00 - 7:00 Dinner</p> <p>7:00 - Time on your own</p> |
| DAY 3 - LEVEL 1 | DAY 3 - LEVEL 2 |

| | |
|---------------|--------------------------------|
| 7:00 - 8:00 | Breakfast |
| 8:00 - 11:00 | Local Plan development |
| 11:00 - 11:30 | Wrap-up / Send-off (box lunch) |

| | |
|---------------|--------------------------------|
| 7:00 - 8:00 | Breakfast |
| 8:00 - 11:00 | Local Plan development |
| 11:00 - 11:30 | Wrap-up / Send-off (box lunch) |

WEAC 2019 Summer Leadership Academy Level 3 (Pilot) Schedule

| Day One | |
|----------------|---|
| 9:00-10:00 | Registration and Check-in |
| 10:00-10:15 | Opening/Welcome |
| 10:30-10:45 | Competency Review |
| 10:30-11:00 | Leadership and Governance |
| 11:00-12:30 | SWOT Analysis |
| 12:45-1:45 | Lunch Keynote |
| 2:00-2:30 | Strategy/Fiscal Health |
| 2:30-2:45 | Break |
| 2:45-3:45 | Leading our Professions |
| 3:45-4:45 | Plan Development |
| 4:45-5:45 | Group Share & Feedback w/Panel of Leaders |
| 6:00-7:00 | Dinner |
| 7:15- | Time on your own |
| Day Two | |
| 6:30-7:45 | Breakfast |
| 8:00-9:30 | Communications & Organizing |
| 9:30-9:45 | Break |
| 9:45-11:30 | Plan Development |
| 11:45-12:45 | Group Share & Feedback w/Panel of Leaders |
| 12:45-1:45 | Lunch Keynote |
| 2:00-2:45 | Advocacy |
| 2:45-3:00 | Break |
| 3:00-4:00 | Plan Development |
| 4:00-4:15 | Break |
| 4:15-5:15 | Group Share & Feedback from Panel of leaders |
| 5:15-5:45 | Local Level Advocacy |
| 5:45-6:45 | Dinner |
| Day 3 | |
| 6:45-7:45 | Breakfast |
| 8:00-11:00 | Plan Presentation to Level 1 and Level 2 Teams/Idea sharing |
| 11:00-11:30 | Wrap-up/Send-off/Lunch to go |

Appendix B: Curriculum Writing

Trainer and Curriculum Writer Application

Name(s): _____

Local: _____

Contact Information (*phone and email*): _____

Are you a member of [insert State Association]? YES NO

The [insert title of leadership opportunity] will focus on the NEA Leadership Competencies. Please mark all of the competencies that you feel you have knowledge of and experience with:

() Advocacy: Advances the cause of public education through social justice and how it benefits our students and members' professional needs and rights.

- Leverages advocacy practice
- Engages community around issues supporting student learning
- Interprets and acts on social justice initiatives
- Leads public education policy reform
- Acts as a political advocate

() Strategy/Fiscal Health: Builds the brand and accomplishes the goals of the association through effective financial management and understanding of fiduciary responsibilities.

- Acts strategically to support the association's value proposition
- Manages budget development and business policy
- Promotes stewardship and financial integrity of the organization
- Manages risk
- Utilizes data and analyzes trends to inform decision making

() Communication: Builds an integrated communication strategy that drives the goals of our professions.

- Develops a two-way strategic communication plan
- Uses current media, technology and social networks to communicate
- Develops communication approach and style to fit appropriate audience
- Acts as an effective speaker
- Acts as a compelling advocate for the organization
- Identifies appropriate messenger(s)

() Governance and Leadership: Sets the mission and establishes strategies necessary for a relevant and thriving organization; empowers, motivates, and fosters a pipeline of talent for the future.

- Effectively executes governance and leadership responsibilities
- Establishes and maintains collaborative, effective relationships
- Advances the organization by internalizing its mission, vision, and core values

- Sets strategic objectives to guide long-term goals
- Develops self and others as leaders

() Leading Our Professions: Advocates for quality inside our professions and promotes our union's role in advancing education transformation and student learning.

- Builds capacity for continual improvement and learning
- Shows educational leadership and understands union's role in student learning and leading our professions
- Advocates for policies and strategies that positively impact our professions and student learning
- Analyzes and applies research, policies and trends to determine potential impact on our professions and student learning

() Organizing: Mobilizes to influence successful organizing outcomes, strengthen internal and external relationships and membership capacity; as well as recruit and identify new members and potential leaders into the association.

- Utilizes organizing best practices
- Builds meaningful community partnerships
- Makes strategic plans that rely on data and analysis
- Engages in collective action to identify and address pivotal issues
- Creates conditions for continuous association growth and strength
- Fosters the development of leaders at all levels of the organization

Please answer the following question on a separate sheet of paper.

1. What experiences you have had as a union leader?
2. How has your leadership enhanced your local?
3. Will you serve as a trainer to develop leadership skills for our members?

Lesson Plan Template

Competency Title

| | |
|---|---|
| Materials: <ul style="list-style-type: none">●●●● | Technology Resources: Laptop Project with speakers |
|---|---|

Competency Themes/Learning Outcomes:

- ★
- ★
- ★
- ★
- ★

1. Topic Title

Competency Themes: (if applicable)

- ★

2. Topic Title

Competency Themes:

- ★

3. Topic Title

Competency Theme:

- ★

4. Topic Title

Competency Theme:

- ★

Sample Lesson Plan: Governance & Leadership - [Level 1](#)

| | |
|--|---|
| Materials: <ul style="list-style-type: none">● Cardstock for nameplates● Flip chart paper● Blue tape/masking tape● Markers● Post-it notes | Technology Resources: Laptop Projector with speakers |
|--|---|

- Scrap paper
- Handouts
 - [Collaborative Styles Survey](#)
 - [Collaborative Styles Explanation](#)
 - [Collaborative Styles Characteristics](#)
 - [SWOT Analysis Resource](#)
 - [SWOT Analysis Template](#)
 - [WEAC's Mission, Vision, & Values](#)
 - [WEAC's List of Officer Roles & Responsibilities Handout](#)
- *Notes and Comments on Robert's Rules: The Essential Guide for anyone who runs or attends meetings that follow Robert's Rules Order* by Jim Slaughter, Gaut Ragsdale, & Jon Ericson

Competency Themes/Learning Outcomes:

- ★ Effectively executes governance & leadership responsibilities.
- ★ Establishes & maintains collaborative & effective relationships.
- ★ Advances the organization by internalizing its mission, vision, & core values.
- ★ Sets strategic objectives to achieve long-term goals.
- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

1. Introduction (Slides 1- 2)

2. What is leadership? (Slides 3 - 5)

Competency Themes:

- ★ Effectively executes governance & leadership responsibilities.
- ★ Establishes & maintains collaborative & effective relationships.
- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

3. Roles & Responsibilities (Slides 6 - 11)

Competency Theme:

- ★ Effectively executes governance & leadership responsibilities.
- ★ Establishes & maintains collaborative & effective relationships.
- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

4. Collaborative Styles (Slides 12 - 19)

Competency Theme:

- ★ Establishes & maintains collaborative & effective relationships.
- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

5. Know your organization - SWOT (Slides 20 - 21)

Competency Theme:

- ★ Sets strategic objectives to achieve long-term goals.
- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

1. Explain why the SWOT is necessary & Complete the SWOT analysis with a team or individually.

6. Strategic Planning (Slides 22 - 27)

Competency Theme:

- ★ Advances the organization by internalizing its mission, vision, & core values.
- ★ Sets strategic objectives to achieve long-term goals.
- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

1. Explain why Long-Term Strategic Planning is necessary
 - Shared vision means everyone is pulling in the same direction toward the same goal
2. Explain Long Term Strategic Planning
 - The process
 - Mission, Vision, Values (Examples from WEAC & NEA)
 - Hand out WEAC's new Mission, Vision, & Values
 - Strategic Goals, Objectives, and Action Steps
 - 3 x 3 x 3

7. Being Awesome/Conclusion (Slides 28 - 30)

Competency Theme:

- ★ Ongoing commitment to personal & organizational culturally relevant leadership development (cultural intelligence, cultural competency, cross-cultural networking)

Planning Documents

Membership Recruitment and Retention Plan (Level 1)

Name(s):

Local:

1. Assess Your Local

a. Engaging your members

i. How does your local reach out to members?

ii. How does your local talk with members?

iii. How does your local communicate with members?

iv. What role does your local play in local school board decision making?

v. What role does your local play in local school board elections?

vi. What role does your local play in ESSA implementation?

b. Review membership data (Provided to locals electronically)

i. % of members in local (or building where applicable):

ii. % of potential members in local (or building where applicable):

iii. Have you done an assessment of membership trends? YES NO

If yes, what have you discovered?

1. Growth in areas?

2. Loss in areas?

2. Setting a Membership Goal

- Write a SMART goal (Specific, Measurable, Attainable, Relevant, and Time bound)

Membership Recruitment & Retention Goal:

3. Establish/Organize a Membership Committee

- Creating a committee

| Tasks to complete | Who is responsible? | To be completed by | Results |
|--------------------------------------|---------------------|--------------------|---------|
| Appoint a Lead/Chair | | | |
| Determine Committee Members | | | |
| Determine Meeting Dates | | | |
| Determine Recruitment Training Dates | | | |

- Membership Sign-up plan & Training your membership team

| Tasks to complete | Who is responsible? | To be completed by | Results |
|--|------------------------|--------------------|---------|
| Determine a lead contact | | | |
| Update Membership forms | Printing: Delivery: | | |
| Plan for one-on-one contact with returning potential members | | | |
| Plan for one-on-one contact with returning new hires | | | |
| Plan for collection of forms / Follow-up | | | |

| Tasks to complete | Who is responsible? | To be completed by | Results |
|---|---------------------|--------------------|---------|
| Building mapping exercise | | | |
| Develop recruitment strategy | | | |
| Determine how you will celebrate success | | | |
| Determine how you will thank your members | | | |

4. Activities & Timelines

a. Back to School Plan

Have you committed to the Association Welcome Program? (Formerly New Ed. Campaign) YES NO

Would you like more information about the WEAC Association Welcome? YES NO

b. One to One Outreach:

| Tasks to be completed | Who is responsible? | To be completed by? |
|--|---------------------|---------------------|
| Determine Local Contact Lead(s) | | |
| Obtain hiring lists | | |
| Determine who will make contact with new employees & how <ul style="list-style-type: none"> ● Divide by building? ● Divide by committee members? ● Divide by mentors? | | |
| Create plan for mentoring new hires | | |
| Obtain mentors | | |
| Create plan for new hire event | | |

c. New Hire Event(s)

| Tasks to be completed | Who is responsible? | To be completed by? |
|--------------------------|---------------------|---------------------|
| Determine a lead contact | | |
| Set a date | | |
| Determine a location | | |

| | | |
|--|--|--|
| Plan activities ● Professional development? ● Social events? ● Resources/Information? ● Statewide Issues/Concerns? | | |
| Plan to invite & invite new hires & other attendees | | |
| Determine other guests ● Regional/Urban Director ● WEA Member Benefits Specialist ● WEAC officer? ● Other? | | |

d. Other Activities

| Tasks to be completed | Who is responsible? | To be completed by? |
|-----------------------|---------------------|---------------------|
| | | |
| | | |

When completed, turn this plan in to WEAC Vice President Peggy Wirtz-Olsen at wirtzolsenp@weac.org. Or share it with her via Google at weacvp@gmail.com

Strategic Action Plan (Levels 2-3)

Step 1: Creating Strategic Goals

- Top priority of the organization BESIDES membership retention and recruitment & SMART

| | |
|------------|---|
| Specific | What specific goal do you have? |
| Measurable | What happens if you organize your members to _____? |
| Attainable | How will you accomplish it? |
| Relevant | Why is this goal important? |
| Time Bound | When will this goal be accomplished? |

- Turn your goal into a question to help you with Step 2

Step 2: Determining Strategic Objectives

- Answer the question you wrote for your goal to determine how you will address each priority
- Organize your answers by theme
- Try to keep it to 3 or 4

Action Steps

- What actions will help you reach each objective
- Determine:
 - what to do
 - who will do it & by when
- Consider:
 - What events will look like
 - Who will be there and how will you get them there?
 - What will people do & What special guests you may include (WEAC officer(s), Regional/Urban

Evaluate

- How it went / What you accomplished
- What you learned / What you would change for the future

Strategic Planning Document (Levels 2-3)

| | | | | |
|-------------------------|----------------|---------------|----------------------------|-----------------|
| STRATEGIC GOAL # | | | | |
| GOAL: | | | | |
| OBJECTIVE #1: | | Action | Who is responsible? | By when? |
| | Action Step #1 | | | |
| | Action Step #2 | | | |
| | Action Step #3 | | | |
| OBJECTIVE #2: | | Action | Who is responsible? | By when? |
| | Action Step #1 | | | |
| | Action Step #2 | | | |
| | Action Step #3 | | | |
| OBJECTIVE #3: | | Action | Who is responsible? | By when? |
| | Action Step #1 | | | |
| | Action Step #2 | | | |
| | Action Step #3 | | | |

Names:

Local:

Goal Development (Levels 2-3)

★ Brainstorm the top priorities for your organization

- Membership retention and recruitment (You cannot use this as one of your goals)

★ Rank order your organizational priorities

| | Priority | Competency Focus |
|---|------------------------------------|-------------------------|
| 1 | Membership retention & recruitment | |
| 2 | | |
| 3 | | |
| 4 | | |
| 5 | | |

★ Choose the 2 priorities your organization will focus on and answer the following questions for each:

- Goal 1:

- What is the specific goal?

- Why is this goal important?

- What will be the outcome if you succeed?

- Goal 2:
 - What is the specific goal?
 - Why is this goal important?
 - What will happen if you succeed?

★ **Turn each goal into a question**

-
-

Objective Development (Levels 2-3)

Answer the question you wrote for each goal (determine how you will address each priority)

Identify THEMES, not specific action steps

★ Goal 1

○

○

○

○

★ Goal 2

○

○

○

○

WEAC LOCAL SELF-ASSESSMENT TOOL (Level 2)



an NEA affiliate

LOCAL INFORMATION:

Name of Local: _____

Type of Local: K-12 ____ ESP ____ Tech College ____

Local President: _____

Local Assessment Date: _____

Local Assessment Team Members:

Local Membership Numbers: _____

Total Membership: _____

Review of Initial Local Assessment: _____

Follow-up Strategic Planning Date: _____

Signature:

Member Submitting

Please return this page, along with page 10, to WEAC by emailing to carusoa@weac.org

INDICATOR: ADVOCACY: OVERALL

| RANK | A. RELATIONSHIP WITH DISTRICT ADMINISTRATION | B. COLLECTIVE POWER | C. COMMUNITY ENGAGEMENT | D. MEMBER ENGAGEMENT | E. SOCIAL AND RACIAL JUSTICE |
|------|---|--|--|--|--|
| 1. | Local president meets with district administration only when there is an issue that he or she feels needs to be addressed | Members do not have a good sense of what it means to build power and influence or are not engaged with their local | The local does not have a strong presence or is not known or respected in the community | Members belong to the local but are not engaged or active. A small group of leaders perform most of the work | The local has not gotten around to social and racial justice initiatives and has not researched impact on educational practice, policy and the profession. |
| 2. | The local president meets with the human resources director on a monthly basis in order to resolve any issues | The local's leadership works with the association representatives (AR's) to promote some basic organizing concepts and strategies | The local has some presence in their community and has organized a few community service activities | Members are aware of some issues- when the local leaders bring them to their attention. Members are seldom involved in the decision-making process | The local understands social and racial justice initiatives from review of research and discusses the impact on educational practice, policy, and the profession. |
| 3. | The local's leadership and a member-committee meet on a monthly basis with the human resources director and/or Superintendent | Association reps have been trained to understand the concept of engaging members and building power; they look for opportunities to use power | The local is known in the community and takes part in some community outreach, engagement as activities to build support | The local seeks regular input from current and new members and encourage members to get involved in local activities, committees and the political process | The local designs advocacy plans and strategies from social and racial justice research that impacts educational practices, policies and the profession. |
| 4. | The local has a strong Labor Management Committee (officers and members) that meet on a monthly basis with district administration | The local organizes its members around vital issues, whether they are contractual or not. By doing so, they leverage their power and influence | The local has developed a very strong community outreach program and continually conducts community power studies and has developed strong relationships with community partners | The local intentionally engages members at many different levels of the association and targets new leaders for vital positions and committees | The local forms alliances with a diverse set of stakeholders to implement social and racial justice initiatives. |
| 5. | The local partners with the district and members are seated on various district committees where their input is valued and opinions appreciated | The local is highly respected within the district and educational community. Members are ready to organize and mobilize around vital issues | The local is supported and highly respected in the community. They have built strong relationships over time and are always ready to mobilize | The local is member-driven and is actively engaged at every level in the association. Members are advocates and can mobilize around critical issues | The local analyzes and strengthens alliances with a diverse set of stakeholders to implement, support, evaluate and communicate social and racial justice initiatives. |

Score A:_____ + **Score B:**_____ + **Score C:**_____ + **Score D:**_____ + **Score E:**_____ = **Total Score:**_____ ÷ 5 = _____

INDICATOR:

ADVOCACY: POLITICAL ACTION

| RANK | A. MEMBER EDUCATION & ENGAGEMENT | B. ISSUE, LEGISLATIVE & CANDIDATE CAMPAIGNS | C. LEGISLATIVE ADVOCACY/FCPE | D. MEMBER ORGANIZING & MOBILIZATION | E. LOCAL BOE AND LOCAL POLITICS |
|------|--|---|---|--|--|
| 1. | The local believes that it is the responsibility of individual members to get involved in the electoral process and that the local should not fill this role | The local makes no effort to recruit members to work on recommended national, state or local candidates | The local has no political action committee and no members that participate in Fund for Children & Public Education (FCPE) | The local has not organized its members around local political issues, legislation or in the community | The local has no real connection with the local BOE nor participates in local politics |
| 2. | The local president is very active in local and state politics but tends to "go it alone" without any member engagement | The local informs members of NEA, WEAC, and local candidate voting issues and recommendations. A small core of members participate in the electoral process | The local president and a few of the local's members are actively engaged in the political process at the local and state levels with FCPE | The local president or officers have some limited influence with BOE members, legislators, and community leaders | The local president handles all of the local's politics. There are some established relationships with BOE members and community leaders |
| 3. | The leadership of the local is actively involved in most aspects of the political process. They understand power connections. A few members actively participate | The local solicits (with the help of their state organization), and trains its members to work on political campaigns | The local leadership stresses the importance of political involvement and FCPE contributions to increase participation and power | Member lobbying activities happen only for political races and ballot measures | Local officers/political committee meet regularly to discuss legislative and BOE action items to share with members |
| 4. | The local has a thriving political education program that engages a majority of its members | The local's political committee recruits members to actively participate in targeted political campaigns and issues. Members understand the value of their engagement and involvement | A majority of the local's members are active and advocate on educational issues that impact their profession and student achievement | The local members have formed political coalitions in the community and meet regularly with legislators | The local organizes its members politically and recruits, screens and interviews, and recommends favorable candidates for BOE, etc. |
| 5. | The local partners with WEAC and member trainers to educate, inform, engage and activate all its members in order to provide a strong impact on political races | Members work together to GOTV for legislative races, staff telephone banks, walk precincts and assist in sending out targeted political mailings | The local leads the way in FCPE contributions and participates in legislative lobbying at all levels. Members are actively engaged in the process | The local membership is organized, active, powerful and ready to mobilize. Their relationships are strong and influence is great | The local is a strong political powerhouse in the community and has the ability to elect pro-education candidates |

Score A:_____ + Score B:_____ + Score C:_____ + Score D:_____ + Score E:_____ = Total Score:_____ ÷ 5 = _____

INDICATOR:

ORGANIZING: MEMBER

| RANK | A. MEMBER ORGANIZING AND NEW MEMBER RECRUITMENT | B. MEMBER TRAINING AND EDUCATION | C. RECRUITING POTENTIAL MEMBERS | D. DATA COLLECTION, ANALYSIS AND STRATEGIC PLANS | E. MEMBER EDUCATION |
|------|--|---|--|--|---|
| 1. | The local distributes membership materials to new hires at the beginning of every school year but has a limited presence at the new employee orientation | The local depends on their Region or Urban for most of their member training needs | The local does a one-time membership "pitch" every year to potential members | The local rarely collects or analyzes data unless it's for contract negotiations. It does not regularly plan but rather is reactive in nature | Members do not have a good understanding of their benefits |
| 2. | The local leadership has a presence at the new employee orientation. A team distributes membership materials and promotional items to new employees | The local provides training materials to members. It sends some selected members to local trainings and workshops | The local attempts to recruit potential members, when they can dedicate time. Attempts in the past have not been very fruitful | The local uses some data to track members and potential members at different work sites as well as for contract negotiations. Planning occurs when issues arise | Leaders and some members have a good understanding of their benefits |
| 3. | The local partners with district administration for new employee outreach/orientation. They meet them separately (luncheon, breakfast, etc.). Local leaders and association representatives reach all new members via a plan | The local provides opportunities for members to get involved by sending members to WEAC and National conferences. Some local trainings are provided by leadership | The local leadership routinely asks that Association Representatives actively recruit potential members at their buildings and worksites with varied success | The local has one or two members that track member/district data for member organizing and in negotiations. The local has a static plan that doesn't change much from one year to the next | The local sends their self-identified leaders to advocacy-based trainings and conferences once or twice a year |
| 4. | Local leaders/Reps have developed a good internal organizing/recruitment plan in which all participate. The plan nets between 80-90% of new employees each year | The local is intentional about providing member driven (year-long) training opportunities for all of its members | The local has an organizing/member recruitment committee that targets and engages potential members on a yearly basis | The local has a "data repository" in order to analyze critical information for important decisions. The local has a yearly, member-focused strategic plan | The local creates training opportunities for all of its members. Most members know the local's history and struggles and possess a shared understanding of collective power |
| 5. | The local has a highly successful organizing, recruitment and new member engagement program that targets all member groups | The local has a strong member training program and partners with WEAC/district leaders for professional development, etc. | The local has a strong member organizing and recruitment program that targets potential members for one on one conversations and strong engagement | The local's database is vital to its strategic planning capabilities and creates a flexible yearly plan with goals, outcomes, strategies, timelines and tactics | The local has a strong advocacy training program for leaders, association representatives, and rank and file members |

Score A: _____ + Score B: _____ + Score C: _____ + Score D: _____ + Score E: _____ = Total Score: _____ ÷ 5 = _____

INDICATOR:

ORGANIZING: COMMUNITY

| RANK | A. COMMUNITY ISSUES | B. COMMUNITY GROUPS & COALITIONS | C. SCHOOL BOARD ENGAGEMENT | D. LABOR SOLIDARITY | E. COLLECTIVE POWER COMMUNITY SUPPORT |
|------|--|--|---|---|--|
| 1. | The local has no connection to the community they work in nor do they concern themselves with community issues | The local does not have a strong connection with parent groups and other coalitions in the community | The local is not very involved at the school board level and does not regularly attend Board meetings | The local has not built any solid alliances with the labor community | The local does not have a community outreach plan and members are unaware of events in the community in which they work |
| 2. | The local has a few connections and contacts in the community and has asked for support during crisis situations in the past. They support a few causes | The local only contacts parents and other community groups in a time of crisis/need | The local president attends school board meetings but does not have much power or an impact on the decision-making process | The local only contacts other labor unions when in crisis or has a looming labor dispute on its hands | The local has made some key alliances in the community but does not meet with them on a regular basis |
| 3. | The local has a small group of members/President that have/has made some good contacts in the community and have/has established a presence | The local has established a positive relationship with parent and community groups and meets with them on a regular basis | The local officers attend regular school board meetings and routinely speak at "public comment" on issues that affect their members | The local leadership has a good relationship with some of the labor leaders in the community and they stay in touch by phone or when issues arise | The local has done a good job of branding itself/creating a strong message to engage the community to garner support for its members |
| 4. | The local has a community outreach plan. Its members have established strong relationships with community leaders/groups & participate in community events | The local partners with parent/community groups and holds vital meetings to educate and engage them in vital school issues | The local officers and building reps from most buildings and worksites attend all meetings and have a strong influence on the local BOE members | The local's members have critical ties to other unions in the area. Relationships are used to further the goals of the local | The local has conducted many community power studies and has analyzed the data they have gathered on community leaders and members |
| 5. | The local has a vibrant community outreach program and has very strong ties with key stakeholders that turn-out for local events on a regular basis | The local has a strong relationship with parent/community groups. They are collaborative partners | The local has an ongoing working relationship with local board members, is involved in board races and exerts collective influence on BOE | The local's member committee attends Labor Council meetings. Labor solidarity is strong and Labor is ready to mobilize at a moment's notice | The local's relationships in the community are strong and established. They engage and educate community members on important issues |

Score A: _____ + Score B: _____ + Score C: _____ + Score D: _____ + Score E: _____ = Total Score: _____ ÷ 5 = _____

INDICATOR:

LEADING OUR PROFESSIONS

| RANK | A. IMPROVEMENT & LEARNING | B. LEADS ON STUDENT LEARNING ISSUES | C. POLICY ADVOCATE FOR PROFESSION | D. USES DATA & RESEARCH TO ADVANCE PROFESSION | E. REFLECTIVE PRACTICES |
|------|---|---|---|--|---|
| 1. | Local does not offer professional development sessions and does not encourage members to participate in professional learning opportunities | Local leaves student learning decisions to district | Local isn't involved as an advocate for profession | Local isn't aware of or doesn't use current research to support profession | Local members are not mindful or deeply aware of who they are as educator leaders, do not engage in reflective instructional practice, and are not aware of areas of possible growth into further leadership. |
| 2. | Local offers minimal professional development, isn't sure of members' need for learning opportunities because local hasn't done an assessment | Local is rarely involved when issues arise regarding student learning needs | Local is aware of need for policy change to advance student learning but isn't sure how to make changes | Local is starting to review research to support the profession | Local members are somewhat mindful and aware of who they are as educators, partially engage in reflective instructional practice, and are aware of areas of possible growth into further leadership. |
| 3. | Local supports district's professional development offerings; has assessed members' needs and expertise | Local is aware of student learning needs in district. Has advocated for needs. | Local is seeking partnerships for advancing student learning and the profession | Local is aware and understands research and policy trends that may impact district | Local helps to create conditions that encourage reflection among peers, administrators and other staff members, based on data and best practice. |
| 4. | Local assesses members' professional development needs and partners with district or offers local run relevant professional development | Local leads on student learning needs with district; highlights members credentials/expertise | Local has created alliances with partners to advance the profession and student learning | Local collaborates with diverse stakeholders to share relevant education research to impact district policy | Local encourages a broad and diverse range of stakeholders to reflect deeply on their roles and responsibilities within instruction, policy, the association, or other elements of teaching and leading. |
| 5. | Professional development is member lead, member driven. Local partners with NEA, WEAC, WEA Academy and utilizes members for professional development. | Local works collaboratively on student learning needs in district | Locals puts proactive strategies in place for our professions by anticipating challenges. | Well-respected local leaders drive effective district policy using research and solicit WEAC/NEA experts when needed | Local helps systems to function with a culture of mindful and meaningful reflection and leads the development and implementation of large-scale instructional, policy, and organizational ideas that incorporate reflection and refinement. |

Score A: _____ + Score B: _____ + Score C: _____ + Score D: _____ + Score E: _____ = Total Score: _____ ÷ 5 = _____

INDICATOR:

COMMUNICATION

| RANK | A. MEMBER CONTACT | B. INTERNAL COMMUNICATION | C. EXTERNAL COMMUNICATION | D. MESSAGING AND BRANDING | E. PUBLIC RELATIONS |
|------|---|---|---|--|---|
| 1. | The local has member contact only during a crisis | The local has minimal communication with the membership and/or the president handles all communication | The local has very little contact with external groups, parents, labor unions | The local has not developed a message or any branding for its members, district or the community | The local does not have a public relations plan in order to build relationships |
| 2. | The local occasionally communicates with its membership | The local officers or association representatives occasionally distribute fliers in order to inform members of important issues | The local president has contact with a few groups, including the media, but only in times of crisis | The local has developed internal messages during difficult times but has not yet employed any branding in order to bolster its public image | The local's public relations lies entirely in the hands of the local president |
| 3. | The local president occasionally makes site and building visits to speak with members on important issues or to listen to concerns | The local has a printed newsletter that goes out to members on a quarterly basis. The newsletter details local, district and state (WEAC) information | The local's <i>communications officer</i> communicates vital information/issues out to external groups during a crisis | The local has formed a member committee to develop a strong internal and external message that resonates with members as well as the community | The local's officers build positive, long-lasting relationships with district administration, the BOE, its superintendent and community leaders/groups |
| 4. | Local officers and association representatives hold regularly scheduled meetings with membership in order to keep them informed and engaged | The local has a website, e-mail/text blasts and telephone trees as well as utilizes social media to reach membership | Local officers/member group/committee meet with external groups on a regular basis to provide them with a deeper understanding of issues | The local's message and branding is clear and unifies the membership as well as the community around its core values | The local's officers, leaders and members work together to create a positive and powerful image of their local association |
| 5. | The local has a strong member contact program that employs relational, member to member conversation techniques or small group meetings | The local has an updated contact data base for all of its members and communicates with them regularly and often utilizing all types of media | The local is the first contact for external groups when educational issues arise. The local has a dedicated website and e-mail communications data-base | The local and its membership have developed a strong, positive and respected reputation in the district and community over time | The local is recognized and heralded in the district, community and local media as a leader in education and its members as "experts" in their profession |

Score A: _____ + Score B: _____ + Score C: _____ + Score D: _____ + Score E: _____ = Total Score: _____ ÷ 5 = _____

INDICATOR:

GOVERNANCE/LEADERSHIP DEVELOPMENT

| RANK | A. LEADERSHIP TRAINING | B. NEW LEADERSHIP | C. DIVERSITY IN LEADERSHIP ROLES | D. LEADERSHIP TEAMS | E. ASSOCIATION REPRESENTATIVES |
|------|---|--|--|--|---|
| 1. | The local officers do not provide leadership training for their members, but the officers themselves have attended regional or state trainings | The local holds officer elections governed by their Constitution and By-Laws and members who wish to run for leadership positions run for office | The local does not intentionally encourage or seek out diversity in different leadership positions | The local has only one dedicated leadership team made up of its elected officers | The local has no (or very few) association representatives at the different buildings or worksites in the district |
| 2. | The local president/officers encourage members to seek leadership training opportunities and partner with WEAC trainers at regional and state conferences | Local president or officers identify possible member leaders for future roles or commitments for local activities | There is some gender and racial diversity in the elected officers as well as in some of the leadership committees and teams | The local encourages and engages members to join committees or groups in the district in order for them to have a stronger voice in their profession | The local has a few association representatives scattered throughout the district that disseminate information (fliers) when asked |
| 3. | The local provides some local training and workshops for their members by bringing in outside trainers. The local sponsors members for selected conferences | The local officers understand the pressing issue of new leader recruitment and target younger members for local leadership roles | The local leaders intentionally seek out minorities, millennials, unrepresented groups and different job classifications for key leadership roles | The local officers advocate for their members to be placed in key district positions. They also partner with members on various teams | The local has over 50% of their buildings/worksites represented with AR's who are trained at various stages to perform union duties |
| 4. | The local president and officers have been trained on delivering workshops on enhancing leadership skills and regularly offer trainings in their local | The local has an active new leader recruitment program that targets members with identified knowledge, skills and potential | Local officers/leaders reach out to the members and underrepresented groups and classifications in order to achieve representational balance | The local functions and makes critical decisions based on team leader ideas and advice. The local is widely represented throughout the district on numerous committees | The local has a strong AR training program which teaches BR's how to advocate, represent members and hold relational meetings, at more than 75% of the district's worksites |
| 5. | Most of the membership of the local has gone through leadership training and is very active and engaged in their local | Officers in the local systematically engage, recruit, train, develop and mentor new leaders for key leadership roles in the local association | The local officers, leaders and committee members are a diverse but very unified group and share a common vision and mission for the local association | The local hears all of the collective voices of its team members, who have become experts on issues that impact their co-workers | The local has a strong AR program led by senior AR's who train their own members on how to advocate for their interests at the worksites |

Score A: _____ + Score B: _____ + Score C: _____ + Score D: _____ + Score E: _____ = Total Score: _____ ÷ 5 = _____

INDICATOR:

STRATEGY AND FISCAL HEALTH

| RANK | A. GOVERNANCE STRUCTURE | B. MEMBER-DRIVEN GOALS | C. DELEGATION OF LABOR & ROLES | D. FINANCES | E. BUDGET |
|------|---|--|--|---|---|
| 1. | The local has an outdated Constitution and By-Laws and the local officers have been in their roles for many years | The local does not have any clearly defined goals for the association | The president does all of the work. There is no delegation of labor and there aren't any committees. Officers follow their president | The local struggles to recruit members, keep accurate records and to remain accountable and transparent. There are no checks and balances | The local president maintains the local's checking account and no real budget actually exists |
| 2. | The local officers abide by the C&B that has been updated at least once in the past five years. They hold officer elections and schedule membership meetings for contract negotiations or during a crisis | The president has some goals and outcomes that are shared out to the rest of the membership on a yearly basis | The president of the local and one or two officers do most of the work of the local with little delegation of duties | The local has provisions/policies that govern maintaining membership records | The president of the local determines and controls the budget and has had minimal treasurer and budget training |
| 3. | The local has an updated C&B and local officers attend most meetings, trainings, WEAC Conferences as well as participate in the WEAC and NEA Representative Assemblies | Local officers meet with members from time to time in order to listen to their concerns and ideas | The local officers have clearly defined roles and delegation of duties. A few member committees meet on an ad hoc basis. Work is done by Officers and AR's | The local treasurer has a clear understanding of the local finances, WEAC policies and procedures, applicable tax laws, dues transmittal process | The elected treasurer of the local handles the checks and balances of the association's budget but has not had a great amount of training |
| 4. | Local officers are seen as leaders and role models by the membership and are supported. They advocate for their members and use parliamentary procedures to run meetings. | The local has a mission and vision (statements) and strong goals that have been developed through countless relational member meetings | Rank and file members are encouraged to take on different roles in the local and the work is performed by many members | The local has a finance and budget committee that provide members with a transparent and strong accountability system and accurate record-keeping | The local's treasurer is well-trained and keeps a good running account of the budget (record-keeping) and provides regular statements to the officers at meetings |
| 5. | The local's governance structure is sound and very representative of its membership. They advocate and represent their members' interests at the local, state and national levels | The local has active and engaged members that drive the local's goals and set new yearly priorities | The local is member-driven and, although the president and officers lead the association, members are actively engaged and involved at all levels | The local undergoes a yearly audit of its finances and the membership votes to approve the budget. Members' dues dollars are being used wisely | A member budget committee, provides a quarterly budget review/financial report which reflects the goals of the local |

Score A: _____ + Score B: _____ + Score C: _____ + Score D: _____ + Score E: _____ = Total Score: _____ ÷ 5 = _____

WEAC Local Self-Assessment Summary

Local's Name: _____

Date: _____



| Program Area | Rank | Needs |
|-----------------------------------|------|-------|
| Advocacy: Overall | | |
| Advocacy: Political Action | | |
| Organizing: Member | | |
| Organizing: Community | | |
| Leading Our Professions | | |
| Communication | | |
| Governance/Leadership Development | | |
| Strategy & Fiscal Health | | |

This page to be returned with the first page to WEAC at carusoa@weac.org

WEAC LOCAL SELF-ASSESSMENT TOOL



SO, WHAT'S NEXT?

After your local's leadership has met, discussed the findings, and worked on the summary document, it is critical that the team reach consensus on the local's immediate needs, as well as identifying those which are short-term and long-term. Once the team has determined these needs, they need to **prioritize them**. It is highly recommended that if a local consistently rates on the *"higher end"* of the scale for most of the indicators, that they focus on moving towards building capacity from the building and district level, to that of the community, county and state levels. If a local rates on the lower end of the scale with a lot of room for growth, they should focus on only one or two indicators to work on at a time.

FOCUS on Questions such as... What can be achieved right now? What can be done in three months, six months, or a year? What resources are needed? Who will be responsible and accountable for the work? Should the local assess themselves once a year? Twice a year? The assessment should guide the planning process.

Sharing Information with Your Members:

Once the assessment and discussion is complete, the local's leadership should disseminate the results to the membership in an all-member meeting. This is a perfect opportunity to personally engage members and share the local's priorities. It is also a great way to receive feedback, member-input and provide members with a voice. By doing this, you identify member interests, passions, and gauge commitment and involvement, especially by asking new members or members that have not participated in any of the local's activities in the past to work together in order to help achieve the local's goals.

Armed with this roadmap, the local can work on specific strategic and measurable goals that are driven by its membership. Building a strong local takes time and commitment, but it also takes strong leadership. Keep at it! There is strength in unity!

Special thanks to the Ohio Education Association for sharing and allowing adaptation of this document.

Appendix C: Materials for State Affiliates Seeking to Engage with Local Leaders

Priority Registration Communication to Invited Local Leaders

Good Afternoon (Insert Local Leader Name)

We hope that this message finds you well. Since members of your local attended last year's Summer Leadership Academy, we invite and encourage you to form a team of 2-5 to join us again this year. This year's WEAC Summer Leadership Academy will be held July 29-31, 2019 on the UW-Stevens Point campus. Please forward this onto other members that you believe we should be engaging in your local association.

The focus of Summer Leadership Academy is on developing leadership skills that can be used to lead a local union, and, more importantly, focused on enhancing the quality of public education and developing and implementing a practical agenda that engages members and leads to success for every student in Wisconsin.

We are offering two training levels this year—Level 1 is a foundational level for those who are new to this work of the association (we've offered this level of training before) and Level 2—is a mobilizing and power building level for those who have either attended our Summer Leadership Academy before or have been engaged with their local association for some time. All levels of the Academy will focus on the National Education Association's Leadership Competencies in the areas of Advocacy, Strategy/Fiscal Health, Communication, Governance and Leadership, leading our Professions, and Organizing. Our trainers are educators and education support professionals like you who are leaders in their locals across Wisconsin. At the training, time will be spent in learning and in the development of a local action plan with your team of 2-5 leaders so that you are ready to hit the ground running when you get back home. This event will also provide an opportunity to network with local leaders from across Wisconsin as we rebuild our union together.

For the first time, we will be running an Equity Training to advance our work toward Racial Justice in Education. The Equity Training will be part of NEA's Leaders for Just Schools program and will be run by our own leaders from Wisconsin who have been trained by the NEA to do this work. If you or members of your local are interested in being a part of this training, please reach out to me for the separate registration link for the Equity Training, and I will share it with you.

Because of the work that we have started together, your local is eligible for Priority Registration to Summer Academy. This event is free for you to attend, but space is limited. Because we have worked together, we are giving you the chance to register EARLY—to ensure your spot, please complete the Priority Registration process before April 26. We will open registration up to ALL WEAC members on Saturday, April 27, at this year's WEAC Representative Assembly.

Remember, because you are eligible for priority registration, you should act now in getting your team members together and in signing up. We are very excited to partner with you in this work to train leaders in your local for our future. If you have further questions, please feel free to contact us. We are happy to discuss it over the phone with you as well.

Thank you for your passion and dedication to your students, your community, and our union.

Officer Use for Recruitment and Level 1



Local Self-Assessment

Name of Local Association:

| Information | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Name | | | | Position in District | |
| Role in Local | | | | Date | |
| Ratings | | | | | |
| | 1 = Absolutely Yes | 2 = Mostly Yes | 3 = Somewhat | 4 = No | 5 = Don't Know |
| Communication-My local union frequently communicates important and relevant information to members | <input type="checkbox"/> |
| Communication-My local regularly employs one-to-one, face-to-face conversations with members | <input type="checkbox"/> |
| Communication-My local has approximately one active building representative for every 15-20 members | <input type="checkbox"/> |
| Organizing-My local has a membership plan | <input type="checkbox"/> |
| Organizing-My local has an active membership/organizing committee | <input type="checkbox"/> |
| Organizing-Members in my local have the tools and training needed for effective membership conversations with the local's non-members | <input type="checkbox"/> |
| Organizing-My local has the confidence and training to become more engaged in the community. | <input type="checkbox"/> |
| Organizing-My local is actively engaged in candidate recruitment, endorsement, and campaigning for school board and other county/municipal elections | <input type="checkbox"/> |



| | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Organizing-Members of my local are informed about local, state, and national legislative and political issues | <input type="checkbox"/> |
| Strategy/Fiscal Health-My local treats membership sign-up as an ongoing activity, periodically asking new members and potential members to join the union | <input type="checkbox"/> |
| Strategy/Fiscal Health-My local assesses local dues, has a budget, regularly convenes a budget committee | <input type="checkbox"/> |
| Gov./Leadership-My local has a robust new employee program that involves introducing new members to union | <input type="checkbox"/> |
| Gov./Leadership-My local does a good job grooming new/emerging leaders | <input type="checkbox"/> |
| Gov./Leadership-My local's leaders receive the training they need to succeed in their positions | <input type="checkbox"/> |
| Lead the Profession-My local has an important voice in curriculum and instruction related issues | <input type="checkbox"/> |
| Lead the Profession-My local plays an important role in the ongoing professional development of its members. | <input type="checkbox"/> |
| Advocacy-My local has a <u>strong</u> network of allies and partners in our community | <input type="checkbox"/> |
| Advocacy-My local actively develops and fosters relationships with school board members | <input type="checkbox"/> |
| Advocacy-My local actively develops and fosters relationship with community leaders, parents, businesses, and others | <input type="checkbox"/> |
| Advocacy-My local has relationships that extend beyond the traditional sphere of union allies (churches, chamber of commerce, library board, etc.) | <input type="checkbox"/> |
| Advocacy-My local is actively involved in the political process including campaigns at all levels | <input type="checkbox"/> |



Local Evaluation

AREAS OF STRENGTH:

AREAS NEEDING GROWTH

LOCAL GOALS:

