



CTA STRATEGIC PLAN FIVE-YEAR REVIEW

Report to CTA Board of Directors





CTA Strategic Plan *Our Union, Our Future* Five Year Review

SPG Review Workgroup Participants

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Opening

CTA's Long-Term Strategic Plan Coordinating Workgroup met on April 4, 2019 to review the progress CTA has made in implementing its strategic plan over the last five years. Along with wrapping up and summarizing the work over this period, the group also identified recommendations to the CTA Board going forward. With this meeting, the charge to the implementation committee was completed. It is now the responsibility of the CTA board to determine how CTA will move forward based on this analysis.

The meeting was facilitated by Lynn Feekin and Paul Krissel. Five years ago, Lynn and Paul were the two lead facilitators of the long-term strategic planning process on behalf of the Labor Education and Research Center at the University of Oregon.

Framework of the Strategic Plan Implementation

CTA's strategic plan was passed at the January 2014 State Council meeting. The Long-Term Strategic Plan Coordinating Workgroup was established to oversee the implementation of the goals outlined in the plan. From the outset, this group recognized the importance of CTA's day-to-day operations aligning with the goals of the strategic plan. They issued two key recommendations to the Board: 1) that progress reports on the plan would be submitted from the field and all departments at each Board meeting; and 2) that regular content regarding progress on the plan would be including in the Educator. These two measures, and the ongoing activities of the Coordinating Workgroup, helped to keep the organization's focus on achieving the plan's goals.

The LTSP Coordinating Workgroup issued four interim reports to the Board: November 2014, March 2015, March 2016, and May 2017. Each report identified key activities that demonstrated progress on the specific goals of the plan as well as recommendations to the Board that they believed were needed in order to continue advancing the goals.

Despite some major external challenges to CTA during this time, it is clear from these reports that the plan guided the focus and direction of CTA's work. While each of the strategic focus areas took steps to move the plan forward, the progress was uneven. This was due to several factors, including a need to recast the image of the teaching profession due to the attacks on public education and a need to build stronger connections with all CTA members because of the likelihood of judicial rulings which would eliminate fair share/agency fees. CTA responded powerfully against each of these threats and at the end of the five-year period emerged as a stronger, more connected, more diverse and vibrant union.

From the interim reports, it looks like the greatest progress on the strategic plan were made in the following areas: Quality Public Education and Our Profession, which encompassed two strategic focus areas, Advocacy on Education and Transforming Our Profession; Building an Organizing Culture; and Social Justice, Equity and Diversity.

The Structure and Governance focus area was acknowledged over the five-year period as the most challenging. Each sub-group in the LTSP Coordinating Workgroup made recommendations to the Board for structural or decision-making changes that could advance their work on the plan. A positive step in this area was redirecting two State Councils per year to focus on Action and Engagement.

Key highlights from activities in the core areas were:

Transforming Our Profession

- Training and development on assessment literacy.
- Expanding and improving peer assessment and review programs (PAR).
- Supporting classroom teachers through programs like New Educators weekend and the Teacher Innovation Expo.
- Establishment of Instructional Leadership Corp.
- LCAP implementation and establishment of Professional Learning Networks.

Advocacy on Education

- Rollout of *The Public Education All California Students Deserve*, an agenda that shaped a new identity of teachers and quality public education.
- Use of that agenda both internally for member engagement and externally with community partners and in legislative initiatives.
- Exposing the efforts of school privatizers and Right to Work.
- Kids Not Profits Campaign to expose agenda of billionaires in supporting corporate charter schools and those who funds anti-education candidates and initiatives.
- Successful campaigns to elect pro-public education Governor, Superintendent of Instruction and other state and local candidates.

Building an Organizing Culture and Organizing Unorganized

- Development of a Member Engagement Toolkit.
- Numerous local activities to engage members, carry out cross-local activities, and reach out to community allies, with tracking of actual activities.
- Use of the Public Narrative and other organizing strategies as an integral part of campaigns and programs.
- Extensive charter school organizing.

Social Justice, Equity and Diversity

- Development of a Social Justice Toolkit.
- Active support and successful passage of Prop 58, the LEARN Initiative, supporting multilingual programs in the schools.
- Racial and Social Justice Trainings with Board and Caucus representatives

Very few organizations have approached implementation of their strategic plan as seriously as CTA. The formation of an implementation group to conduct regular reviews and hold the organization accountable demonstrates how the plan has driven the agenda of CTA over the last five years. Successes were noted, shortcomings were acknowledged, and adjustments were made as circumstances changed. The plan was a living document. Additional progress was made since the last report, and the purpose of this five-year review was two-fold: first, to appreciate and contemplate the breadth of the progress that was made; second, to pivot to the future and identify areas to recommend to the CTA Board for their consideration going forward.

Looking Back, Looking Forward

It's clear that the internal and external environment for CTA in 2019 is very different from what the organization faced during the earlier part of the decade. It's important to distinguish those differences in order to acknowledge the achievements that were made through work on the strategic plan and to recognize that the challenges CTA will face in the future will call for different strategies and actions.

To outline these differences, David Goldberg, CTA Secretary-Treasurer, provided an overview of the changes in the external and internal environment affecting CTA over the last five years. Becky Zoglman, Associate Executive Director, walked through a number of slides that showed the changes in public attitudes toward teachers and unions. After these presentations, participants engaged in discussion and offered additional observations about how the political, economic and social context has changed. Following are some highlights of these changes:

Positives/Successes:

- The public perception of teachers, teachers' unions, and unions in general, has improved
- We have changed the narrative from "teachers care about salaries" to "teachers care about kids"
- Even with the Supreme Court decision on Janus, CTA had a net increase of members
- There is more active work across CTA locals, learning from each other
- There is a new boldness among younger members
- We have done more charter school organizing
- We won two successful funding initiatives
- We pushed for successful implementation of Common Core standards
- Collective action itself is more popular
- We experienced more grassroots and bottom-up activity among our members
- There is less "3rd partying" of the union – members take ownership of their union
- "Red for Ed" has been a strong movement with public support

Challenges/Threats:

- The Janus decision caused an \$8 million revenue loss to CTA as fee payers dropped
- There are still ongoing attacks on teachers
- Even with the new funding initiatives, there is still insufficient revenue to provide high quality education for all
- Higher Ed is being threatened by attacks on freedom of speech
- CTA must consider the role of the union educators around a number of issues:
 - The threats to “Dreamers” and other vulnerable groups
 - Increased and more explicit racism
 - Increased income inequality
 - Increased number of natural disasters
 - Increased number of students experiencing trauma
- Many of our members still don’t see the threats that are facing us

Summarizing Progress on Strategic Focus Areas

Participants broke into groups based on the implementation workgroups they had been working in during the last five years. Each group reviewed accomplishments and reported out to the whole group. Following are the reports back from each group.

QUALITY PUBLIC EDUCATION AND OUR PROFESSION

Advocacy on Education

There was a great deal of pride in how well CTA has done in this area. CTA has driven the agenda publicly and has involved members in new ways around their profession. CTA has achieved major legislative and proposition victories using this agenda. Getting the Service Centers more engaged in advocacy, moving advocacy further to a grassroots level, and building coalitions were noted as areas that still need work.

Accomplishments:

Goal 1: Develop a student-centered, proactive agenda for public education that advances CTA's mission.

- We developed an agenda with input from members and tested with members and public.
- Some training, not to 70% presidents
- Trainings to Summer Institute and within Communications – Estimate 50% + at Presidents Conference
- Well used by many local chapters in organizing for bargaining with some developing their own advocacy agenda.
- Campaign model pilot with some expansion to the field. Helped to set up membership engagement.

Goals 2/3: Use Advocacy Agenda to build power with students, parents, the community and elected officials as well as to build capacity within.

- Used in public, political and bargaining organizing messages across CTA
- Kids Not Profits, exposing who funds anti-education candidates, who is behind Janus – and how it is all connected.
- High numbers of educators elected to political office in CA and nationally
- Big election victories – Governor, State Superintendent, Prop 30/55, LCFF and other legislation, passed ESSA, State Legislation and local School Board races
- Changed Grassroots Lobby Program and is changing again.

Fell Short/Abandoned

- Identifying members connected to community groups (-)
- Creating local access to member database (+/-) *(plus and minus means we did it, but need to do more)*
- Grassroots lobby program (+/-)
- Using Service Centers to build alliances with community groups (-)
- How much advocacy agenda was used at the Service Center level (?) *(We don't know answer to this. Some Service Centers used it, some we just don't know about.)*

Transforming our Profession

Participants felt that CTA had moved a long way toward this goal, one that is of major importance to members. Although much progress has been made, the need for better structural support within CTA was identified, especially in connecting members and Local Presidents directly to the governance structures.

Accomplishments

- ILC – Agency over professional development
- Resurgence of PAR
- Expansion of IFT
- Strength based approaches
- LCFF Trainings/Tools (not extensively utilized)

Fell Short

- Resources go to more “well-resourced” affluent schools/districts that have time, energy, priorities and capability to access and use them leaving struggling districts/schools and members further behind.

Abandoned Goals

- Common language for educators became less important as we changed narrative with action

Structure and Governance Impact

- CACS progress was not supported by CTA Structure/Governance (grassroots)
- Service Centers determine their own fate, disconnected from broader organizational goals, reluctant to change
- Networks vs. silos
- All structures including State Council need to include Presidents
- Balance across Regions leads to provincial thinking

BUILDING A STRONG UNION

Building an Organizing Culture

Participants in this workgroup felt that CTA had made great strides in creating tools for member engagement and establishing CACS. There has been strong local activity in member outreach, establishing CATs, and CBC, but the level of buy-in has been uneven across the regions and the locals. The initiative to transform Service Centers to have more of an organizing agenda was rejected and needs to be revisited.

Accomplishments

- CACS - California Alliance for Community Schools
- Platform, coordination in bargaining, support, etc.
- Pockets of success in CBC
- One-on-one conversations
- CATs (site action teams)
- Member engagement and chairs
 - Grants
 - Sharing ideas
 - Know members vs nonmembers
- Reduction of "3rd party union"
- Connected member engagement and organizing
- BCG
- Lots of organizing training

Fell Short

- Transforming Service Centers
- Creating regional and statewide bargaining platforms
- BCG not institutionalized
 - Institutionalizing one-on-one meetings and site visits, not just as events
- Expanding use of site action teams

Abandoned Goals

- Service Center Council reform (But still want to act)
- State Council is back to how it used to be; not focused on an organizing culture

Leadership Development

A great deal of work was done to align and improve databases to track success in this area. Additional leadership training opportunities have been provided. However, many more opportunities for leadership pathways need to be created and greater attention given to removing barriers to leadership pathways.

Accomplishments

- Leadership database
- CTA 360, CTA 360 Pro, Falcon
- Active maintenance of data
- Reports and information to leaders and staff
- Local organizing to develop leaders
- Leader and member-led organizing

Goals to Continue

- Local leadership trainings need to be reviewed and revamped to reflect organizational priorities
- Eliminate barriers to information and access
- Encourage new member participation in all trainings – leadership and professional development

Goals Abandoned

- Owner's manual
- Formal, structural mentoring

Community Engagement and Coalition Building

Participants acknowledged that there were a number of initiatives started in this strategic focus area. But it was felt that there needs to be a significant increase in community engagement activities as well as a major push to create greater buy-in at the local and Service Center levels. They cited several structural impediments.

Accomplishments

- Goal 1 – Increase awareness – Completed, but needs to be ongoing
- Increased (↑) community engagement (LCAP, etc.)
 - Banning, OEA, UTLA, Yuba City, Calaveras
- Goal 2 – Create team model – Completed, but still needs widespread distribution/implementation
- Trainings
 - Summer Institute
 - Grants
 - Toolkits
- Members see/agree with need

Goals Not Met/Shortcomings

- Goals 3-5 – Phase in Community Engagement teams across CTA - MODIFY
- Continue with goal at Service Centers, discussion necessary to determine how this gets done (add Community Engagement to Equity Team) change charge of the Equity Team in some way. This requires consideration of structural changes.
- Success sporadic with local chapters by their own efforts (silos) and attached to crisis
- Structural impediments
 - Local resistance (SCC no voice, “us vs. them,” resist CTA)
 - Outside community groups usually groups with people of color, CTA leadership is not reflective of this
 - Dissolved community outreach department
 - Autonomy vs structural guidance (lack of internal motivation)
 - Is Service Center Council the proper vehicle/place to address this? Reconfiguration did not happen
 - CTA Structure impeded growth of this goal
 - Circumstances may have prohibited this goal being as effective as hoped for (*Janus*, etc.)

Goals Abandoned

- Goal 4 – not intentionally abandoned but not much fruit/progress
- Goal 6 – didn’t happen

Social Justice, Equity and Diversity

This workgroup felt that there had been significant accomplishments within CTA on this focus area, but that there is still much work to be done. Specific training for the several levels of leadership in the organization, as well as the inclusion of social justice in many CTA training programs, has been very positive. The group felt that there were many other opportunities to make progress in this area with additional funding and prioritization.

Accomplishments

- Racial and Social Justice Trainings for Board, Caucus Leaders and CTA Cabinet
 - Next step: staff
- Incorporating social justice in CTA Trainings as electives (Presidents conference, Summer Institute)
- Focus on Unconscious Bias – Locals, School Districts, state-wide
- Passes CTA/NEA Policies on white privilege and white supremacy (NBIs)
- CTA Social justice toolkit and posters
- CTA Staff Diversity Climate survey
- EMAC → REAC
- Teacher pipeline – Continue
- ILC – introduction of social justice – Continue

Obstacles

- ILC Funding?
- Teacher Pipeline – funding, priority
- Racial and social justice training – continue to staff
- Ethnic Studies Bill (Medina) - Will be accomplished
- Structure – flexibility needed
- Communication (honest)
- Intern Program (Funding, climate) – assess and modify?

Organizing Unrepresented Education Workers

Participants felt that there was some progress made in organizing, but that the work fell short because of the lack of a statewide plan that identified unrepresented education workers. More resources are also needed in this area.

Accomplishments

- Goal 1 – Progress, but no document
 - Do we develop a document?
 - We have been educating members without document
 - Outside challenges
- Goal 2 – Ongoing progress
 - Support/organizing charters
 - Education
 - Unit modifications
 - Other unrepresented education workers (higher ed, ESP, substitutes)

Fell Short

- Organizing Higher Ed
- Goal 3 and 4
 - Identify unrepresented workers
 - Build a statewide plan

Need

- More resources
- Greater coordination/direction on statewide basis

Structure and Governance

All participants present acknowledged that Structure and Governance is the one area of the strategic plan where there has been little progress. It was agreed that each of the focus area workgroups today would identify structure and governance implications of both the work over the last five years and the resulting recommendations to the board for future consideration. Structure and governance need to support and be in alignment with the strategies of CTA. This remains a stumbling block for CTA's continued success.

Recommendations to the Board for the Future

Participants broke into their groups again to identify recommendations for the CTA Board that they should consider going forward in the existing strategic focus areas.

QUALITY PUBLIC EDUCATION AND OUR PROFESSION

Advocacy on Education

- Advocacy Agenda review and relaunched periodically to ensure continued implementation.
- Reporting on Service Center Council and Regional use.
- Grassroots lobby program must become effective (in progress with GR Coordinator – single point of contact).
- Keep improving membership management system – moving to an organizational engagement database.
- Identify and engage members who belong to community groups – include training on utilizing this information. (Did not accomplish – needs emphasis in the future).
- Social media advocacy role.
- Emphasis on optimal school funding.

Transforming our Profession

- Make educator-led professional issues advocacy and professional learning as core functions of CTA with sustained funding, on-going support structures such as ILC/IFT, policy and contract development. Recognize educator agency as a foundation of CTA programs.
- Redesign Service Center Councils as nexus of information sharing around innovation and pedagogy and teacher voice.
- Make State Council a Council of Presidents.

BUILDING A STRONG UNION

Building an Organizing Culture

- All goals are ongoing, and we need to continue the work on institutionalizing the pockets of success – scale up. (page 8)
- Infrastructure to support leaders and staff in implementation of what they learned at trainings.
- Revisit changes to Service Center and building the organizing culture. They aren't useful if they don't change. (page 21)
- Model possibly after CACS?? (CA Alliance for Community Schools, which is basically a caucus/coalition of mostly urban chapters.)
- Revisit State Council goal – aren't using it to its capacity to support an organizing culture. There are more opportunities to share the good things that are happening as models. (page 21)

Leadership development

- Continue to develop strategies to eliminate the blocking of opportunities
- Develop leadership academies at all levels
- Enable pathways to leadership
- Create roles for members to be involved outside of Union roles.

Community engagement and coalition building

- Goal 1 – Increase awareness – Completed, but needs to be ongoing
- Goal 2 – Create team model – Completed, but still needs widespread distribution/implementation
- Goals 3-5 – Phase in Community Engagement teams across CTA – MODIFY
- Continue with goal at Service Centers, discussion necessary to determine how this gets done (add Community Engagement to Equity Team) change charge of the Equity Team in some way and, or, etc. (Requires structural consideration.

Social justice, equity and diversity

- Teacher Pipeline
- Introduction of Social Justice Com (?)
- Racial and Social Justice Training for staff
- Ethnic studies bill – will be accomplished
- Structure – more flexibility
- Intern Program – assessed and modified?

Organizing unrepresented education workers

- Goal 1 – Drop/Do not need a document
- Goal 2 – Continue with a coordinated effort
- Goal 3 – Identify unrepresented workers - Continue with more resources
- Goal 4 – Create/build a statewide plan with greater coordination & direction

Identifying New Issues for the New Terrain

Lynn and Paul asked participants to consider the discussion earlier in the day on the changed environment facing CTA in 2019. They then facilitated a brainstorm exercise asking what new issues would be important for CTA to address in the future?

Responses:

- Develop position/strategy on dual enrollment
- Foster pipeline for community colleges and CSUs and how fostering multi-cultural and multi-lingual teaching links to this pipeline
- LCFF Dashboard – organize around that
- Member retention strategies
- Living wage/income inequality – where members live
- Address institutional racism/inequality
- Work in coordination with labor to develop health care system
- Longer-term school funding (5-10 years)
- Deal with issues on students with trauma (no suspensions/dismissals)
- How to integrate all players at local level in terms of the whole child
- Pension issues
- Dual language immersion schools
- Role of technology and impact of social media
- Enemies are planning their long game – we need a long game (Justices, Negative stories regarding educators, schools...)

Priorities to be Recommended to the Board

Lynn and Paul then asked participants to use dots to identify their top priority recommendations for the CTA Board to consider for the future. The top vote getters were:

Top Existing Issues

- Revise Service Centers..... 28
- Building/deepening Organizing Culture..... 18
- Make professional learning and issues the core functions of CTA 13
- Social Justice – Teacher Pipeline..... 13
- Coalition Building..... 10
- Enable pathways to leadership..... 7
- Proactive role in 21st century education 4

Top New Issues

- Member Retention Strategies..... 13
- Address Institutional Racism/Inequity 8
- Proactive role in 21st Century Education..... 4
- Schools and Community First..... 4

Observations from Consultants

Lynn Feekin and Paul Krissel offered some observations based on their work with CTA in formulating the plan and in coming back five years later to facilitate this review.

Lynn noted that when she reviewed the interim reports, she was impressed by how much has been accomplished in moving the plan forward. The conversation today affirmed that CTA has been serious about implementing the plan and making adjustments along the way as circumstances changed. It has been a living document guiding the organization forward. The very existence of a broad implementation work group demonstrates the seriousness with which CTA approached adoption of the plan. The plan has guided the agenda of the organization.

Paul noted that it is not unusual for an organization to have difficulty addressing the structure and governance issues. At the time of the adoption of the plan, all the current structures and roles are in place. Perhaps it was optimistic to think that within the first year, areas of adjustment to the structure and governance that would need to change to best support the plan would become obvious. But now, 5 years later, we can see where the structures of CTA supported the plan, and where there were difficulties. Even so, current structures have constituencies and it is hard for people holding positions within those structures to be impartial about examination of whether changes need to be made. Paul suggested imagining that CTA did not exist, and that all the locals across the state wanted to create a statewide organization based on the strategic areas of focus and this 5-year review. What would you build to support those objectives?

Closing

In closing, President-elect Toby Boyd thanked the group participants for all the work they have done over the years assisting in and reviewing the implementation of the five-year strategic plan. He assured the group that the Board would seriously consider these recommendations as they contemplate how CTA needs to move forward strategically.

This report will be provided to the CTA Board for their consideration going forward.

Report compiled by Lynn Feekin and Paul Krissel