

The Massachusetts Teachers Association and Education in the Commonwealth

Public education is no longer strictly a local affair. Concerns about funding inequalities, low-performing schools, and wide gaps in student achievement have led to a series of reforms giving state and federal governments more say in how schools and teachers work. Key decisions around teacher evaluation, standards, assessments, calendars, and schedules are now shared by local, state, and federal leaders and policymakers. In this context, schools face increased accountability, growing competition, and constrained financial and human resources. Increased complexity and the pace of reform require careful coordination among adults, especially at the local level, working together. Effective labor-management collaboration is one essential component to improving the learning of all students across diverse communities. As recent studies show, when teachers unions and districts work together to solve problems, students learn more.¹

While there is evidence that collaboration can improve student achievement, there are few resources demonstrating exactly how teachers unions and district- and state-level leaders can work together more effectively. The gap in working knowledge is especially salient at the state level. Massachusetts, like many other states, has been playing a greater role in districts and schools. Requirements in the federal Race to the Top grant competition further increased its influence on local education policies. State education agencies and state-level education-focused organizations were tasked with developing and implementing plans that addressed teacher evaluation, learning standards, and persistently low-performing schools. The Massachusetts Department of Elementary and Secondary Education and a group of organizations that represented diverse stakeholders – students, parents, teachers, and businesses – had more influence than ever on schools across the Commonwealth. Yet, there were no models to follow in how to carry out the work.

In this study, we examined how the Massachusetts Teachers Association (MTA) took a leadership role in this new context. An affiliate of the National Education Association, the MTA has more than 110,000 members – teachers, support professionals, librarians, nurses, counselors, and others – working in schools and higher education institutions in Massachusetts. The MTA's impact on educational policy and labor-management collaboration has been significant and is acknowledged by proponents and opponents alike. The main goal of our study was

to learn more about the work of the MTA and how it has become a driving force in education in Massachusetts.

We talked to local district and union leaders as well as school committee members, state education leaders, and MTA leaders. We also examined newspaper articles, newsletters, research reports, collective bargaining agreements, and websites to understand the context of education and labor-management relationships in the Commonwealth. In all, we interviewed 32 people (**Appendix A**) and analyzed over 600 pages of documents. Five key findings emerged:

1. The MTA is perceived as a proactive leader in influencing educational policy in Massachusetts and local communities.
2. There is wide variation across local communities in the capacity to engage in effective labor-management collaboration.
3. The MTA field representative plays a critical role in facilitating effective labor-management-community relationships.
4. The MTA offers differentiated supports and services to address the needs of locals at different phases of collaboration.
5. Balancing the diverse interests and approaches of local affiliate leaders and MTA staff remains a challenge.

In the following sections, we describe each of these key findings and provide vignettes of on-the ground practices in three communities to illustrate how the MTA works with local affiliates and school districts.

Background

Massachusetts is considered a reform leader in K-12 education. It was one of the first states to adopt standards-based reforms and implement comprehensive state assessments, which are some of the most rigorous in the United States. Politicians and leaders in the state have dedicated considerable resources – more than \$13 billion dollars, equating to \$13,361 per pupil – to educating the state’s 954,773 students. Student achievement is the highest in the nation. On the National Assessment of Education Progress (NAEP), Massachusetts 4th and 8th graders have had the strongest overall performance in the United States in reading and math since 2005. Massachusetts also has one of the highest high school graduations rates – nearly 85% of students who entered high school in 2008 graduated in four years.² Yet, the Commonwealth has similar struggles as other states in closing the achievement gap between students of different races and income levels. On the 2011 NAEP, for example, there were 30 percentage point proficiency gaps in reading and math between African-American and Hispanic fourth graders and their white counterparts (see **Appendix B** for achievement data).

The 11-member Massachusetts Board of Elementary and Secondary Education (BESE) is charged with ensuring the quality of education in the state. Composed of the Secretary of Education, a student representative, and nine members appointed by the Governor, the BESE establishes education policies covering early childhood, elementary, secondary, and vocational-technical schools. There are also a host of organizations and advocacy groups that play key roles in influencing and improving education in Massachusetts. In addition to the MTA, there is another leading teachers union in the state – AFT Massachusetts. An affiliate of the American Federation of Teachers, AFT Massachusetts represents more than 25,000 educators, including teachers, paraprofessionals, custodians, bus drivers, and secretaries. Other key stakeholders representing school committees, parents, superintendents, and community members include the Massachusetts Association of School Committees (MASC), Massachusetts Association of School Superintendents (MASS), Massachusetts Business Alliance for Education (MBAE), Stand for Children Massachusetts, and Massachusetts PTA (see **Appendix C**). The leaders of these and other organizations often work together on state-level committees, such as the Task Force on Evaluation, to shape education policy and practice in the Commonwealth.

The Massachusetts Teachers Association

Founded in 1845, the Massachusetts Teachers Association has evolved into one of the most influential NEA-affiliates in the nation. Over the decades, the MTA’s advocacy for students with disabilities, equitable school funding, state standards, teacher evaluation, and healthcare and pension reforms has served as a model for other teachers unions across the nation. Though it focuses on educational issues, the MTA is committed to broad social justice objectives. The organization’s bylaws state four key goals: 1) Maintain and improve quality education for all; 2) Promote and protect the principles of human and civil rights; 3) Uphold high professional standards and advance the socio-economic well-being of members; and 4) Encourage the affiliation of local educational associations and to promote mutual assistance among those and related organizations. As illustrated in the mission statement at the core of the MTA’s theory of change are its members. It is the members who operationalize the MTA’s goals by teaching, advocating, bargaining, lobbying, and leading.

MTA Mission Statement

The MTA is a member-driven organization, governed by democratic principles, that accepts and supports the interdependence of professionalism and unionism. The MTA promotes the use of its members’ collective power to advance their professional and economic interests. The MTA is committed to human and civil rights and advocates for quality public education in an environment in which lifelong learning and innovation flourish.

The MTA is a democratic organization governed by a Board of Directors and Executive Committee composed of elected representatives and permanent staff. The 65-member Board of Directors directs the strategy, establishes the legislative package, and approves internal hires. It meets at least six times a year and includes the President, Vice President, and Executive Director, executive committee members from regions across the state, and representatives for retired members, and support professionals. The smaller 13-member Executive Committee - composed of the President, Vice President, Executive Director, and 10 representatives - meets more frequently and provides more guidance on the day-to-day work of the MTA.

The democratic nature of the state-level governing board is reflected throughout the organization. Locals are organized into eight geographically-based Executive Committee regions and more than 60 Regional Board Districts across the state based roughly on a ratio of 1900 members per district, each with their own elected boards. In addition, there are nearly 20 different statewide committees that provide input on rules and bylaws, candidate endorsements, government relations, and professional development. Education Support Professionals and retired members also have their own statewide board and Executive Committee seats.

The democratic governance of the MTA is best illustrated at the Annual Meeting of Delegates, which typically occurs sometime in May. Each local is entitled to send at least two delegates to the meeting, plus one additional delegate for every fifty members over a base of fifty. If all delegates were to attend the meeting there would be approximately 2,600 delegates, however, only about 1,000 delegates regularly attend. At the meeting, the delegates adopt the meeting agenda, establish the budget, and set the policy direction of the MTA. Every two years, the delegates also elect the President, Vice President, Regional Executive Committee members, and Board of Directors. While the MTA democracy can make reaching consensus on policies challenging, it enables the organization to be led by its membership, giving teachers and support staff a voice in education policy.

MTA President Paul Toner and Vice President Tim Sullivan serve as the elected leaders and represent governance and membership. They also act as the public spokespersons for the organization. Executive Director Anne Clarke serves the MTA Board and works hand in hand with the officers managing the staff and carrying out Board decisions and implementing policies. The three leaders - Toner, Clarke, and Sullivan - meet regularly to discuss key issues and solve problems. They also set aside half days every month for mini-retreats to focus on critical strategic issues without distractions. The partnership has worked effectively over the three years the leaders have worked together. As one senior MTA staff member remarked, "Paul, Tim and Anne are simpatico. They have a good partnership."

Toner, Sullivan, and Clarke work with the Executive Committee and Board of Directors to carry out MTA's Strategic Action Plan (SAP). Developed over the course of several years and adopted in 2009, the Strategic Action Plan gives direction and focus to MTA personnel and members through three goals:

1. Educate, organize, mobilize and engage our members in a systemic manner in order to advance our agenda as a union of professional educators.
2. Position the MTA as the voice of public education, from early education through higher education, and re-establish the social compact with a message that connects with parents, community members, public opinion leaders and policymakers.
3. Develop the internal supports required to accomplish our dual goal of being a more member-driven organizing union while continuing to provide a high level of professional service to members.

The implementation of the SAP represented a shift in the direction of the MTA to a more progressive and proactive reform organization. It reflected calls from board members for the MTA to shift from a service-oriented union to one that organized and engaged members in the profession of education. Toner explained: "The MTA had been critiqued for a long time for being stuck with our 'Service in the 70s' mantra from the 1970s, which emphasized supporting teachers with legal, insurance, and grievance procedure services. We were perceived as an insurance agency. Teachers saw us as the place where you go for help with grievances but not where you can learn to be a better teacher."

Conversations about addressing the issue began in the 2000s under then-MTA President Catherine Boudreau. When Anne Wass became MTA President in 2006 she formed a Strategic Action Committee and charged it with addressing the MTA's strategy. Toner sat as chair of the committee. But, as the MTA responded to a series of ballot initiatives that threatened funding for public schools, changes in Executive Directors, and other internal and external issues, the work was delayed. It wasn't until 2009, towards the end of Wass' second two-year term that the Strategic Action Committee finalized the strategy, which was then approved by the Board of Directors (see **Appendix D** for excerpts of the SAP). The three strategic goals reflected a hybrid strategy that blended service and organizing union models. The SAP also established a set of "Organizational Imperatives" to be addressed immediately, including streamlining decision making and aligning the budget to support the new strategy. As a result, the MTA increased investments in training and technology, developed data-evaluation protocols, and enhanced internal communication systems.

A key initiative exemplifying MTA's evolution to an action-oriented advocacy organization was the creation of the Full Capacity Local Initiative. The Full Capacity Local formed the core component of the organizing prong - Goal 1 - of the strategy. The goal was to develop locals into healthy organizations that could successfully engage large numbers of members in advocacy and political action to advance teacher professionalism and obtain resources for public education. As a first step, the MTA established a set of attributes of a Full Capacity Local, and developed and organized trainings around the criteria (see **Appendix E**).

As the MTA has moved forward with implementing the Full Capacity Local and the SAP, its influence on state and local policy and practice became more evident. State and local leaders recognized that the MTA was playing an increasingly larger role in developing policy language and the rollout of new policies at the local level.

Key Finding 1: The MTA is perceived as a proactive leader in influencing educational policy in Massachusetts and in local communities.

Through its history, the MTA has impacted the trajectory of public education in Massachusetts. Before teachers even had the right to collectively bargain, the MTA was instrumental in getting the law passed in 1954 that required certification for teachers. After teachers gained the right to collectively bargain in 1965, the MTA helped locals organize and negotiate improved compensation and due process rights. Through the 1970s, it helped reform how students with disabilities and second language needs were educated. In 1993, after fighting for 17 years to address inequity in education funding resulting from Proposition 2½, the MTA backed the passage of the Massachusetts Education Reform Act. The 1993 Education Reform Act significantly increased financial support for public schools and introduced state standards, and implemented the Massachusetts Comprehensive Assessment System (MCAS), which is used as a measure of school and district performance.

Over the last decade, the MTA has seen its influence grow as it focused on broad stakeholder collaboration and remained open to changes in the education sector. The MTA helped craft the first and second applications to the federal Race to the Top grant competition, ultimately bringing the state \$250 million for public education. It helped shape the Achievement Gap Act of 2010 by revising processes for Level 4 and Innovation schools to include more teacher and community voice, and pushing for elements of wrap-around services. At the same time, the MTA has formed coalitions to defeat ballot initiatives, such as Question 3 in 2010, which would have significantly reduced resources for public education by cutting the state sales tax by more than half. Leaders in the state, such as Karla Baehr, former Deputy Commissioner at the Department of Elementary and Secondary Education, recognize the key role the MTA has played over the years and the important

perspective it brings to educational policy: “The MTA always brings a perspective of teacher voice. They enriched the conversations around the table, even if it was uncomfortable at times. They have the horsepower to pay attention and are engaged early and often.”

The success of the MTA is often attributed to its open-minded and constructive approach to collaboration, what former Secretary of Education Paul Reville calls “a spirit of problem-solving.” For example, Stand for Children Massachusetts does not always agree with the MTA, especially around issues of teacher evaluation and dismissal. Yet, its Executive Director Jason Williams commends the MTA for remaining collaborative, and staying focused on supporting its member teachers: “MTA has been a critically important stakeholder in working together on policy objectives for education in Massachusetts. Once you wade through political rhetoric, we are aligned with the belief that the quality of the work of teachers is key.” Tom Scott, leader of the Massachusetts Association of School Superintendents agrees, “MTA plays a significant role in educational policy in Massachusetts. They are receptive to collaboration with all stakeholders.”

The leadership of the MTA, particularly President Paul Toner, is also singled out as a key reason for the organization’s success. Toner is described as practical, willing to listen, and constructive. As Williams at Stand For Children says, “He is always willing to sit down and talk.” State leaders acknowledged that Toner understands the competitive pressures on education, and that public schools lose legitimacy if performance does not improve. Former Secretary of Education Reville explained: “Paul Toner has been critically important to effectiveness of the MTA. He has infused a new style of union leadership that sees problems as sector problems, not just union problems.” MTA staff and members also praise Toner’s leadership style. Director of the Grassroots Campaign JoAnn Fitzgerald: “He gives us a seat at the table without giving up collective bargaining or the rights of people in the workplace. What he talks about he lives.” For his part, Toner attributes effectiveness to what he calls “extreme relationship building:”

It is all about relationship building or what I call extreme relationship building. I tell people I never make decisions based on what I read in the press or op-eds. I will come and meet with you, even if we disagree. It is hard to say something negative about someone if you know them personally.

The impact of the MTA is most evident in the development and implementation of the new comprehensive teacher evaluation system in Massachusetts. The state’s winning Race to the Top application included revising the educator evaluation system with a new framework that incorporated multiple measures of achievement, which used MCAS scores as a “significant factor.” In August 2010, BESE established

42-member Educator Evaluation Task Force to develop the new system. Toner and Kathie Skinner, Director of the MTA's Center for Education Policy and Practice, were appointed as members of the Task Force along with others representing Massachusetts Association of School Committees, Massachusetts Association of School Superintendents, Massachusetts Business Alliance for Education, Stand for Children Massachusetts, Massachusetts PTA, AFT-Massachusetts, practitioners, and academics.

After two or three meetings, it was clear to Skinner and Toner that there was a risk that the Task Force would not make progress, BESE would have to make a decision, and a teacher evaluation process would be forced on teachers. Skinner explained: "There were circular conversations, walls covered in paper, and people asking broad questions like, 'What does good teaching look like?'" MTA leaders decided that rather than react to policy, they would be "architects of reform" and propose their own teacher evaluation system. Inspired by a report touting "triangulation" as a core principle of evaluation, Skinner worked with MTA staff, the MTA Board, and external partners to develop a teacher evaluation that incorporated observations based on standards of effective practice, MCAS test scores, and locally developed measures of student learning. After getting the MTA Board to approve the proposed framework, Skinner and Toner gave it exclusively to the Boston Globe to disseminate. Although the headline incorrectly emphasized that a teachers union supported using test scores in teacher evaluation, the MTA, and many outside observers, believed the union was finally pursuing a proactive, not reactive agenda.³

In reality, each teacher received two ratings – one for overall performance based on standards of effective practice and another for impact trends on student learning rated low, moderate, or high. A discrepancy between ratings triggered an improvement plan. Skinner and Toner presented the plan to the Task Force and changed the conversation. After deliberations about language and implementation, the Task Force voted almost unanimously (three members dissented) to adopt 90 percent of the MTA-developed framework, which was then approved by the BESE.

The MTA continues to work very closely with the Department of Elementary and Secondary Education (DESE) to implement the evaluation. After its approval, the MTA collaborated with the leaders and lawyers from Massachusetts Association of School Committees, Massachusetts Association of School Superintendents, and DESE to develop model contract language for local communities. Former Deputy Commission Baehr described the process: "In many ways, the development of the model language resembled collective bargaining at the state level. Major power players – and their lawyers – from MASS, MASC, DESE, and the MTA sat around a table negotiating the model contract language." To the leaders, the alternative was almost unthinkable – every lawyer in every local trying to negotiate contract

language for the evaluation from scratch. Now that the evaluation is being implemented, the MTA is working closely with DESE to improve training sessions.

For education leaders in the state, the MTA's work on the evaluation was representative of its leadership in shaping policy. Reville summarized: "Rather than lay back and have it forced on them, the MTA got proactive and became a powerful force in shaping the evaluation." Skinner emphasized: "We are not parochial anymore. We are impacting national policy. The question is how do our actions affect the enterprise? We must evolve. We can't have a 19th century model in the 21st century." Still, not everyone was satisfied with the outcome. Linda Noonan, Executive Director for the Massachusetts Business Alliance for Education, commented: "There is disproportionate focus on the bottom non-performers. The evaluation design does not recognize or promote excellence or really treat teachers as professionals." These tensions continue to play out locally where affiliates must work to implement the new evaluation systems as well as engage in a host of other state-level and school-based reforms.

Key Finding 2: There is wide variation across local communities in the capacity to engage in effective labor-management collaboration.

One of the key challenges the MTA faces in affecting change in education is the tremendous diversity of views and capacities of stakeholders involved. Differing perspectives about the purpose of education and the role of the teacher is often most apparent at the local level in the relationships between the superintendent, school committee, and teachers union. In fact, the superintendent's and school committee's views about the role of labor have a significant impact on the depth and impact of collaboration in local communities. As Lois Mason, a MTA Field Representative, says: "You need all three – the school committee, superintendent, and union leadership – to be engaged and have the right orientation."

In the District Capacity Project (DCP) launched in the summer of 2012, teams composed of the superintendent, union president, school committee member, teachers and administrators committed to work together on a focused project (see text box below for more background information). Members signed an agreement that established basic expectations and proposed a project. Teams then received training in interest-based bargaining and the ongoing support of a third-party facilitator. After the first few months, it became clear that the seven communities involved in the DCP had very different needs (the eighth district, Lowell, joined later). Some teams, like Fall River, were just beginning to establish a trusting relationship between labor and management. In places like Leominster, the team was using the Project as an opportunity to deepen a collaborative relationship that

had been developing for several years. The DCP team from Brockton was working through a leadership transition.

**Ronnie Center for Education Research & Policy:
Labor-Management Initiative and District Capacity Project**

Launched in 2003, the Ronnie Center Labor-Management Initiative has a mission to improve student achievement by creating the opportunity for professionals to collaborate and innovate to meet challenges, respond to evidence, and put knowledge to work for the benefit of children. At the core of the Initiative is the theory of change that if professional relationships in the field are fundamentally transformed to place student learning at the core, then student achievement will improve. Ronnie Center Founder and former President, Paul Reville calls it a “high-priority reform approach that creates mutual ownership of student learning.” In 2012, the Ronnie Center became a founding member of the Massachusetts Education Partnership, which formed to help teams of superintendents, union leaders, school committee members, teachers and administrators collaborate more effectively to accelerate student achievement. A key initiative of the Partnership is the District Capacity Project, which provided expert support and facilitation to eight labor-management-community teams. The teams meet monthly as they work on focused projects, such as revising teacher compensation systems and implementing professional learning communities. One of the goals, beyond building local capacity, is to examine whether collaboration has positive change and improves student achievement. The MTA is also a founding member of the Massachusetts Education Partnership and has played a key role in the District Capacity Project by giving financial support, encouraging local affiliates to engage in the project, and supporting implementation.

For a few communities, like Malden, the DCP was about sustaining an already deep partnership between the district, union, and community. Malden’s work in the DCP illustrates the wide continuum of capacity in communities to engage in effective labor-management-community collaboration. On one end of the continuum are districts where the union president and superintendent refuse to work together; on the other end are places like Malden.

Malden has a long history of labor-management collaboration dating back to the passage of Proposition 2 ½. The law decimated Malden Public Schools, according to one former superintendent, forcing hundreds of teacher layoffs and closing schools. Rather than fight amongst each other, the district, union, and community banded together to find solutions. More than thirty years later, the district, school committee, and union cite collaboration as their greatest strength. In this context, Malden's DCP project has the bold goal of creating a “culture of dialogue” in the

district to “advance innovation and student achievement.” The DCP team has committed to meeting regularly and carrying out individual work projects to keep the project moving forward.

Facilitated by Mel Myler, the Malden DCP team has been meeting two times a month to learn the tools of improved dialogue including the “hierarchy of questions” and “four quadrants of dialogue: download, debate, dialogue, and conversation.” Union President Marguerite Gonsalves likens the meetings to therapy: “I feel like I am going to therapy. We are there to talk about how do you talk to each other. It is three hours of honesty.” The team’s initial work culminated in a “Day of Learning” involving 32 stakeholders – parents, teachers, union members – using a train the trainer model. Over the late spring and into the fall of next school year, the DCP members plan to expand the team and integrate the culture of dialogue work with the superintendent’s executive team, union leadership team, school committee, city council, and school leadership. The MTA field rep is expected to play an important role in facilitating the rollout of the DCP work.

For the Malden team members, there are key lessons from the initial work to improve collaboration. Superintendent David DeRuosi remarked on the important role history plays: “It is important to remember what went wrong, learn from what went wrong, and move forward. Never throw away the past. Learn from it.” For Gonsalves, the DCP created a structure to work together with district and community leaders: “It created a venue where we see and talk about what good education looks like.” From School Committee member Adam Weldai’s perspective, the DCP is about developing a community-based solution by working together: “When the lawyers go home, we’re the ones left. School committee members must go in with an open mind and be ready to enter the conversation. One naysayer can set off the whole group.”

Key Finding 3: The MTA field representative plays a critical role in facilitating effective labor-management-community relationships.

Because locals have such different needs and capacities, the MTA field representative plays a critical role, facilitating effective relationships between the district and union. In general, there is about one field rep for every 2500 members across sites. But, because locals vary in size, a field representative could oversee as many as 30 local MTA affiliates, which also means providing assistance with 30 different contracts, although most field reps are responsible for 10 to 15 different locals. Basic responsibilities include helping negotiate contracts, giving advice on due process rights, filing unfair labor charges, and “putting out fires.” Coordinating the work is one of the more challenging tasks. Said one field rep: “Keeping track of

everything going on is incredibly hard. You must keep a very good calendar, a tight to do list, and do a lot of planning.”

Field representatives also communicate and provide training on new state initiatives, and help local leadership engage in effective collaboration with the district. Very few local unions have the membership numbers to support a full-time release president. That is, most union presidents are also working full time as teachers in the district. So, much of the work supporting clear communication between the union and district gets done by the field representative. Grassroots Director Fitzgerald explained that the field representative has one of the most important roles in the work of the MTA: “The MTA lives and dies by the field rep. There must be an effort to bring members into the process. That starts with the field rep.”

In Leominster, for example, MTA field representative Lois Mason has played a key role in accelerating labor-management collaboration and the work of the DCP team. Leominster Union President Barry Hudson is especially thankful for her help: “Lois is a wealth of information, provides workshops and plays a big role in negotiations. She was instrumental in helping us use interest-based bargaining.” Mason’s skills and values were a perfect fit for Leominster’s stage of collaboration. After a period of superintendent turnover marked by contentious contract negotiations, Leominster Public Schools had started to form a deeper partnership with the teachers union.

In the time prior to Superintendent Jim Jolicoeur’s arrival in 2011, there had been three superintendents in 4 years and five union presidents in last 12 years. Jolicoeur came in to the leadership position familiar with interest-based bargaining from his work in the private sector. He connected with Mason, who was also a strong believer in interest-based bargaining or IBB. In contract negotiations the following year, Mason helped the district and union use IBB to reach agreement in record time, while also tackling hard issues. According to one veteran administrator, the conversations were more open than they ever had been in the past two decades.

When Jolicoeur found out about the DCP initiative he talked with Hudson and Mason about putting together an application. Facilitated by IBB-expert Tim Fitzgerald, the Leominster DCP team decided to focus on revamping the teacher salary schedule for its project. The team read articles about innovative approaches to teacher compensation and considered condensing the salary schedule from 14 steps to 3. However, the group lost some traction trying to tackle such a complicated topic as its first task. In the late fall, the team shifted to developing a new “teacher leader” position, as a starting point for a career ladder. The DCP team created a position description and qualifications and is currently engaged in recruiting. In addition, all the work is codified in a memorandum of understanding,

which may eventually be integrated into the contract in the next round of negotiations.

The team members described the goals of the project as finding a way to enable talented teachers to reach their full potential and elevate the teaching profession. Superintendent Jolicoeur emphasized the importance of the work to the district: “The project allowed us to rethink how things are done. You build capacity by finding good people. The good people in districts are the teachers in schools and you must build a relationship with the union to release teachers’ potential.” For the union president, Hudson, it made practical sense to work together with the district and school committee on such projects: “It is more intelligent to solve problems together. Just because you are on a different side doesn’t mean you can’t solve problems together.” The team will return to the salary schedule next fall, and members believe they have a good foundation upon which to build. As the Leominster Human Resources Director said: “This set a good foundation. We now have the building blocks to do more important work.”

Key Finding 4: The MTA offers differentiated supports and services to address the needs of locals at different phases of collaboration.

To support the field representatives and the local affiliates, the MTA offered differentiated supports organized around two key spheres of work: building the Full Capacity Local and creating favorable conditions for teaching and learning. Training and Local Affiliate Services performed the core work to support the Full Capacity Local. Government Services and the Center for Education Policy and Practice focused on influencing educational policy that supported teachers.

As a core activity of the MTA, Local Affiliate Services involves all the field representatives and staff at the regional offices. There are seven regional offices – Auburn, Boston, Braintree, Holyoke, Lynnfield, Pittsfield, and Raynham – organized roughly by geography and membership numbers. Each office is led by a coordinator and houses seven or eight field reps. The regional offices help direct services to local associations around negotiations, contract enforcement, political action, and organizing. They also develop and hold trainings for field representatives and local affiliates.

The MTA also offers direct services to local affiliates in finance and accounting, legal, and benefits. The Finance and Accounting Service provides assistance to local associations with bookkeeping and finance issues, membership processing, treasurer-training programs, and materials. Legal Services offers free expert legal advice and representation from experienced MTA attorneys who are experts in labor law. MTA Benefits gives members’ discounted services in financial planning, home mortgages, wellness, travel, and entertainment.

A newly created Training Services Division will develop and coordinate the hundreds of professional opportunities for local affiliate leaders and their members. Staff in the new Training Services Division will organize the MTA Summer Conference in Williamstown, which every summer has provided tailored multi- and one-day training sessions where teachers earn continuing education credits by attending training in professional and traditional union work. The Williamstown Conference also has sessions on building a Full Capacity Local, which target advocacy, political action, and organizational health and effectiveness (see **Appendix F** for sample sessions). There are also programs for new members, emerging leaders, and new presidents, as well as sessions on teacher evaluation, collective bargaining, and formative assessments.

The MTA provides additional conferences and workshops for members and locals, as well. As part of the Full Capacity Local initiative, MTA staff members help locals develop strategies at multi-day retreats. Focused on new presidents and locals in crisis, the MTA provides benchmarks around professional development, contracts, and membership engagement that illustrate a high-performing local. As Toner explained: “It is all about developing leadership and building capacity at the local level.”

Another core task of the MTA is creating favorable conditions for teaching and learning through policy and legislative actions. Director of Government Services Jo Blum explained the importance of the work: “Peoples’ lives in the classroom are impacted by political decisions. We have to connect the dots of where the power lies, and influence policy that impacts members’ lives.” Over the last few years, the MTA has narrowed down its policy agenda to four or five core issues. Of course, the MTA must also respond to policy issues that were not of their making. As Blum said: “We don’t have control over the policy agenda. Some things come our way that are aligned with our goals, and others we don’t have any control over, but must respond.”

To give members more say in the policies that affect their work, the MTA launched the Grassroots Organizing Campaign initiative. The goal is for every local to have a Political Action Leadership Team composed of active members who get to know their state senators and representatives, and act as liaisons for other members who want to connect with politicians. The work on the ground is supported by research from the MTA’s Center for Education Policy and Practice (CEPP), led by Kathie Skinner. CEPP has produced influential research on professionalization of teaching, teacher evaluation, and effective strategies for closing the achievement gap.

Key Finding 5: Balancing the diverse interests and approaches of local affiliate leaders and MTA staff remains a challenge.

Despite its success impacting education in Massachusetts, it has been challenging at times to orient every staffer and every local towards collaboration. The move to an organizing union that is open to differing viewpoints has not been easy. Many field staff whom have had a very long career with MTA under the more traditional service model have either retired or transitioned out. There are also a small but vocal group of members who disagree with the leadership and changes in the MTA. Some demand that MTA continue to pursue a service model while others some believe that the MTA has “given the store away” by collaborating with stakeholders with differing viewpoints and want to see a more confrontational stance. Toner finds the polarized positions frustrating: “I very much work in shades of gray. If I waited to get consensus on everything from 110,000 members and almost 200 staff, we wouldn’t make a decision on anything.” Yet, the members’ dissent highlights that the perspectives in the leadership of the MTA are not always shared throughout the organization. As Scott, leader of the Massachusetts Association of School Superintendents, said: “The interface between superintendents and unions is often through the field staff. Perspectives on collaboration do not always translate to the field staff. The challenge is changing the culture of the entire organization.” Former Secretary Reville concurred: “MTA actively participates in shaping educational policy. Change has been more significant at the state level, but things at the local level have changed more slowly.”

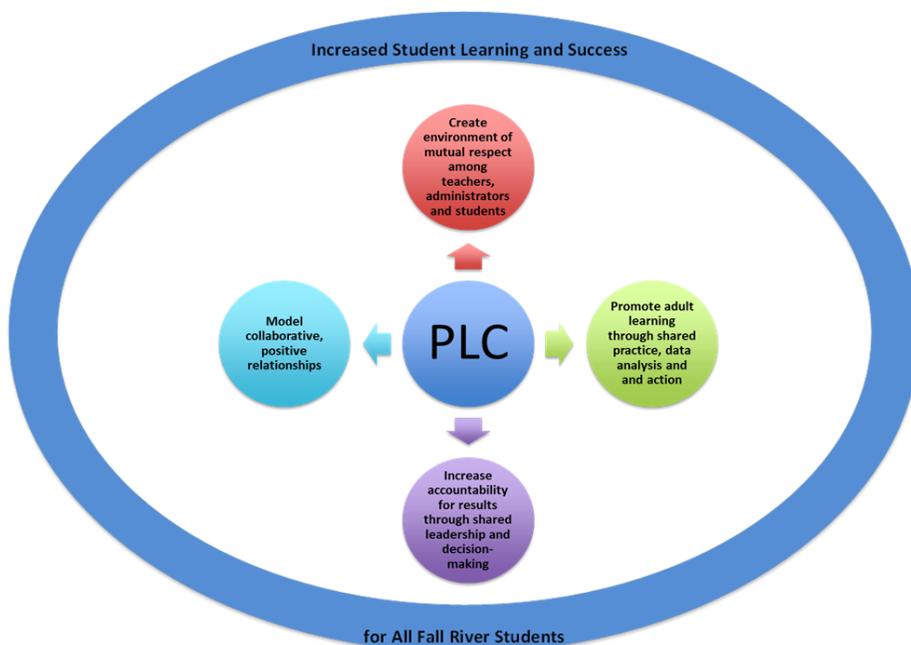
But, Toner does not back down when he hears about practices from staff members that conflict with MTA’s orientation towards collaboration. “Tell me the situation and give me the names,” is how Toner responds. He will then follow up at the local level to find out the situation, where he often finds the other side of the story. It usually comes down to the local personalities involved. But, when it is something unprofessional, Toner and Clarke take action. Toner then returns to the person who said there was a problem and shows them a spreadsheet of all the conversations he had with people. Still Toner admits: “We are like any big organization. We have our flaws and need to hear those from members, staff, and other education stakeholders.”

The work going on in Fall River is an illustration of just how much time building collaboration takes in a community. The district and union have a historically contentious labor-management relationship; the last contract negotiation took almost two years - 643 days - to reach agreement. Fall River entered into the DCP with differing views of the work and a lack of trust between the district and union. Said one Fall River DCP member: “The perception and reality is there was a lack of trust on both sides.” While the two sides had different perspectives about the work,

they were both committed to improving relations and saw the DCP as an opportunity to secure support. Led by Facilitator Lainy Fersh, the district and union began moving towards common ground.

After two months of meeting, members began to establish some basic ground rules around collaboration and narrowed in on the topic of developing professional learning communities in schools. The group developed a graphic representation of the focused project that illustrated how professional learning communities were embedded within the goal of increased student achievement (see Figure 1).

Figure 1 Fall River Professional Learning Community Graphic



While the initial work was very challenging, the group began to develop a trusting relationship. Said one member, “Agreeing on a collective project was our first challenge. We had to build that trust and put aside our egos and personal agendas.” The group finally decided that a next step was to develop a survey that assessed the baseline school climate in each school. The plan was to use the results from the survey to help implement professional learning communities in schools. One member of the DCP team commented: “The initial survey is a great plan. At this point, we are just trying to get honest answers from teachers and staff about the climate and perceptions of the school.”

The survey was jointly communicated by union president and superintendent, but teachers were still worried about participating because the survey required a login. The DCP team worked to protect the teachers’ anonymity, assigning the same login.

In the end, participation was significantly higher than other similar climate surveys, such as the Massachusetts Teaching, Empowering, Leading & Learning (TELL) survey. With support from the MTA field rep, principal and union building representatives are now starting to sit down together and jointly discuss results – strengths and weaknesses. The next step is to develop a work plan that can be operationalized through a Professional Learning Community. One union member of the team reflected on the process: “There is a long history of animosity so the trust factor was a challenge at first. However, that disappeared relatively quickly as we began working together.” A district member agreed: “They need us as much as we need them. It was a very good thing for us to get together through the DCP project.”

Conclusion

The MTA and its leadership recognize that public education has changed. Competition, federal and state intervention, and accountability are the new normal. In this world, President Paul Toner stresses that “teachers can no longer be the objects of reform.” He and MTA leaders believe that they and members must build on the momentum created and continue to collaborate and problem-solve with all stakeholders. The five key findings from this report can help inform the MTA’s work going forward:

1. The MTA is perceived as a proactive leader in influencing educational policy in Massachusetts and in local communities.
2. There is wide variation across local communities in the capacity to engage in effective labor-management collaboration.
3. The MTA field representative plays a critical role in facilitating effective labor-management-community relationships.
4. The MTA offers differentiated supports and services to address the needs of locals at different phases of collaboration.
5. Balancing the diverse interests and approaches of local affiliate leaders and MTA staff remains a challenge.

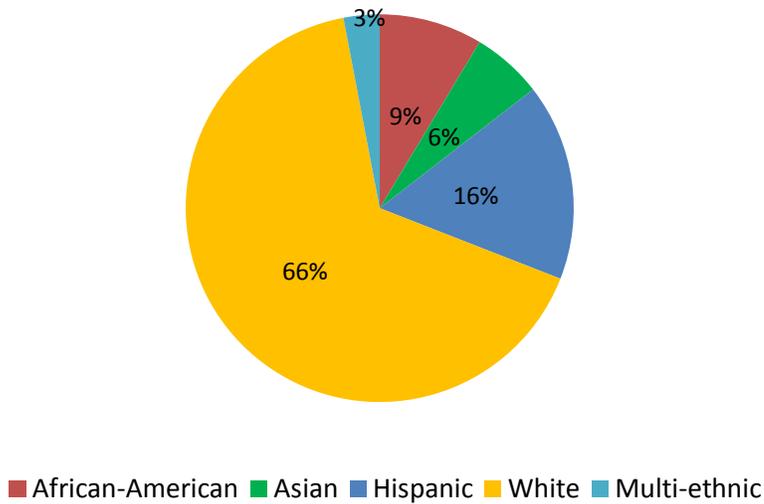
The future is filled with more challenges and the work of collaboration takes time. Baehr, for one, is cautious about quick fixes: “This is extraordinarily complicated work. We want a balanced approach, which means finding common goals and working with many different personalities.” For the MTA, teachers will always be an important voice in education. As Skinner points out, “Besides parents, the one other person who cares most about the child is his or her teacher. We must give voice to those teachers. The MTA gives voice to the classroom teacher in educational policy.” Toner emphasizes: “We can’t make big change without engagement from teachers. The MTA provides the only legal structure where teachers’ voice can influence educational policy.”

Appendix A Interviewees and Affiliations

Interviewee Name	Affiliation
Karla Baehr	Former Deputy Commissioner, DESE
Joanne Blum	MTA Director Government Relations
Andrew Bundy	Co-director of District Capacity Project
Nick Catoggio	Malden Community Liaison
Ann Clarke	MTA Executive Director
Bill Comeau	Leominster School Committee Member
David Danning	MTA Research Director
David DeRuosi	Malden Superintendent
Donna DiNinno	Leominster School Committee Member
Dan Ferreira	Fall River Teacher
Lainy Fersh	District Capacity Project, Fall River Facilitator
Jo Ann Fitzgerald	MTA Director, Grassroots Campaign
Tim Fitzgerald	Co-director of District Capacity Project
Marguerite Gonsalves	Malden Teachers Union President
Barry Hudson	Leominster Teachers Union President
Susan Moore Johnson	Harvard Graduate School of Education
James Jolicoeur	Leominster Superintendent
Glenn Koocher	Massachusetts Association of School Committees
Lois Mason	MTA Field Rep, Leominster
Josh Levit	MTA Field Rep, Fall River
Meg Mayo-Brown	Fall River Superintendent
Mel Myler	District Capacity Project, Malden Facilitator
Linda Noonan	Massachusetts Business Alliance for Education
Maria Pontes	Fall River Principal
Paul Reville	Former Massachusetts Secretary of Education
Tom Scott	Massachusetts Association of School Superintendents
Kathie Skinner	MTA Director, Center for Education Policy and Practice
Ann Marie Stoica	Leominster Human Resource Director
Tim Sullivan	MTA Vice President
Paul Toner	MTA President
Adam Weldai	Malden School Committee Member
Jason Williams	Stand for Children Massachusetts

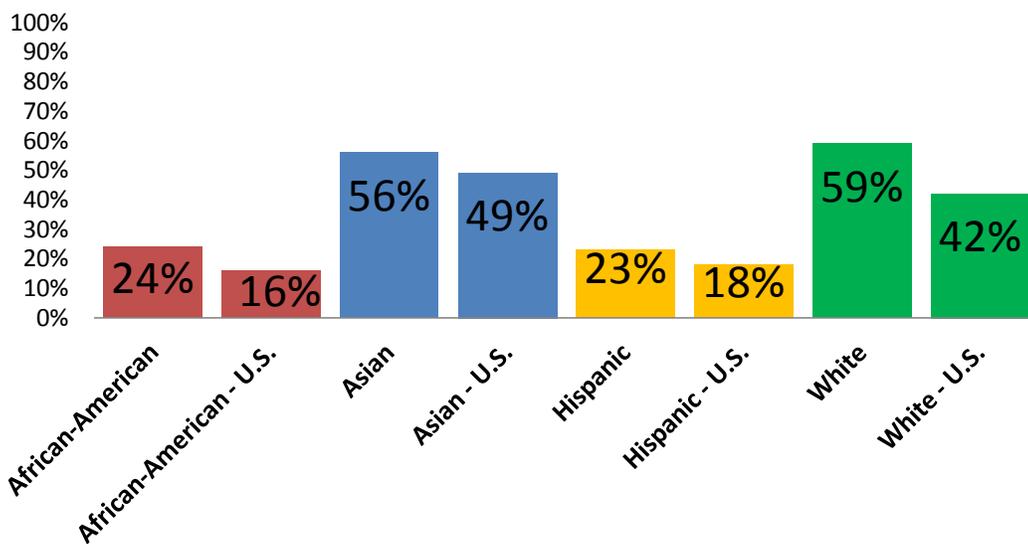
Appendix B Demographics and Performance of Massachusetts K-12 Students

Demographics of Massachusetts K-12 Students

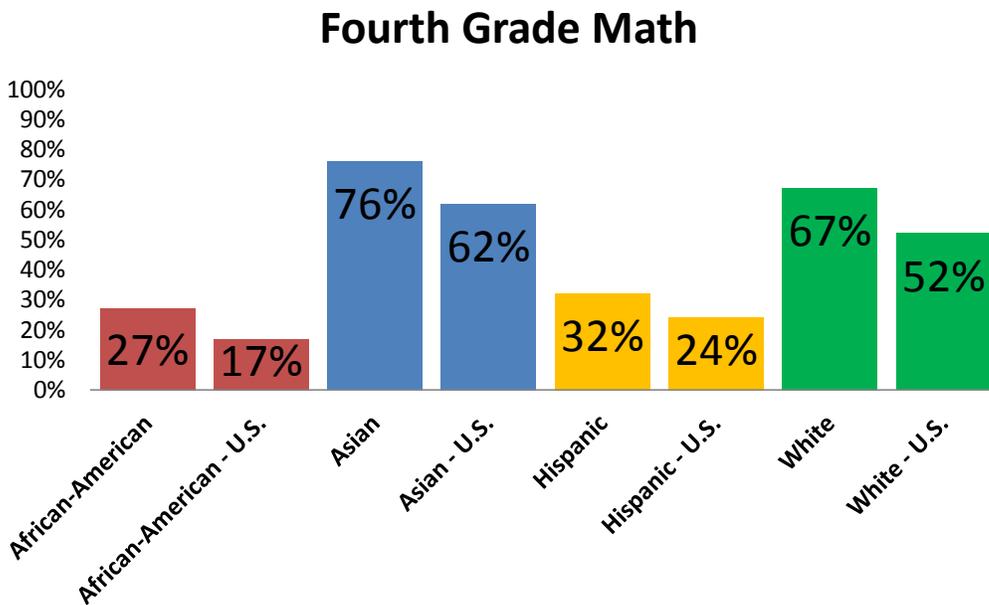


NAEP Grade 4 Reading Students Testing Proficient or Advanced in MA and U.S.

Fourth Grade Reading



NAEP Grade 4 Math Students Testing Proficient or Advanced



Appendix C Key Stakeholder Organizations in Massachusetts

Massachusetts Association of School Committees: Supports school committee leadership development through advocacy, training and services. Provides direct field services, legal services, and superintendent searches. Also develops advocacy reports, conferences, and trainings. Led by Glenn Koocher.

Massachusetts Association of School Superintendents: Organization serving professional and advocacy concerns of school superintendents and assistant superintendents. Holds regional roundtables, Executive Leadership Institute, Technology Leadership Conference, and a variety of other professional development opportunities. Also, advocates for superintendents on educational policy. Led by Tom Scott.

Massachusetts Business Alliance for Education: Educational advocacy for business leaders that promotes education policies and practices based on measurable standards of achievement, accountability for performance, and equitable educational opportunities for all students. Led by Linda M. Noonan.

Stand for Children Massachusetts: Child advocacy organization that supports expanded school choice, additional learning time, increased investment in education, and reforms to evaluating teacher effectiveness. Led by Jason Williams.

Massachusetts PTA: Organized in 1910 and incorporated in 1913, approximately 19,000 members in 119 local units throughout the state. Provides a support network to local parent units and councils statewide through conferences, workshops, personalized schools of instruction, and numerous publications and materials. Led by Erik J. Champy.

Appendix D Excerpt from the Strategic Action Plan

A. Strategic Action Goal Number 1

Educate, organize, mobilize and engage our members in a systemic manner in order to advance our agenda as a union of professional educators. To achieve this, we must:

- i. Provide local associations, chapters and members with the training, assistance, tools and resources necessary to enhance their capacity to engage the membership at the local level to advance our agenda.
- ii. Identify and cultivate future leaders and new activists and connect them to opportunities for training and leadership development.
- iii. Develop the internal systems necessary to communicate with and engage a broader range of our members.

Recommendation 1

Spread the strategic action vision. Finalize and disseminate an MTA “Full Capacity Local Assessment” tool that identifies the characteristics of a powerful, successful, strategic, member-driven union and use it to build capacity, involvement and appropriate structure.

- a) Communicate the vision to be achieved at all governance and staff meetings, along with a sense of urgency based on the realities we face.
- b) Encourage locals and chapters to build the strategic action concept and its components into their leadership and membership meetings.
- c) Ensure that members of the MTA field staff broadly promote the Full Capacity Local Assessment tool and work with locals and chapters to conduct the assessments as soon as possible.

Action Steps

- Review and finalize the Full Capacity Local Assessment tool. Develop a field plan and structure – with timelines included – setting forth realistic goals for having the largest possible number of locals conduct assessments.
- Develop common language for dissemination of the strategic action vision and talking points for use by leaders in communicating the plan and activating members.
- Ensure that the needs brought forth through use of the local assessment tool are a major component of the training offered at the MTA Summer Conference and throughout the organization.

Appendix E Attributes of a Full Capacity Local

- Advocates for members via collective bargaining, grievance and arbitration processing and enforcement of legal rights.
- Is recognized as the “voice of education” by members, parents, community leaders and the media.
- Has numerous leaders who are seen by members as trailblazers in important areas.
- Has many members who understand and can articulate the role of unions in creating a just society.
- Has leaders and members who are actively engaged in the political process at the local and state levels, model political engagement to others and actively participate in the MTA candidate recommendation process.
- Has a political action structure and members who are trained to take part in campaigns and lobbying.
- Has strong bylaws, transparent financial and membership systems and a firm commitment to meeting its legal and fiduciary obligations.
- Is dedicated to long-range planning, with meaningful involvement at all levels by leaders and members alike.
- Has an intentional program for eliciting and addressing the concerns, values and goals of new members, thereby generating leadership for the future.

Appendix F Sample Workshop Sessions at the MTA Summer Conference

- Advocating for Teachers
- Full Capacity Local Assessment Planning
- The Educator Evaluation Track
- Collective Bargaining & the New Educator Evaluation System
- Building and Maintaining a Strong Financial Operation in Your Local
- Taxes and Your Local Association
- Unwrapping the Mystery of Parliamentary Procedure
- Teaching Global Issues through Primary Sources
- Geography + Technology X Fun = Geocaching
- Turning History into Stories: You Are There
- Music as tool for Learning in the Elementary Classroom
- The Fine Art of Windows Movie Maker
- Automating of Middle School Technology Engineering through Simulation
- Cooperative Games to Enrich Classroom Culture

Endnotes

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²Vaznis, J. (2013). Massachusetts high school graduation rates continue to rise. *Boston Globe*, January 24, 2013. <http://www.boston.com/metrodesk/2013/01/24/massachusetts-high-school-graduation-rates-continue-rise/Mq1UbDR1gx4lwBCmBERNHJ/story.html>

³ Bierman, N. (2010). Teachers would tie own rating to MCAS ; Massachusetts union accepts use of scores in making evaluations. *Boston Globe*, December 21, 2010.