

May 25, 1999  
Memphis Education Association  
126 Flicker Street  
Memphis, Tennessee 38104  
Phone: 901 454-0966

*Data Collection:* Bill Harju, Interviewer  
*Data Source:* Wayne Pike, Executive Director  
Lucy Stansbury, President  
Ken Foster, UniServ Director

## **A. Demographics**

*Number of Schools:* 166 Schools, 5-6 Alternative sites

*Elementary* 100

*Middle/Junior High* 33 Middle level some middle schools, some Jr. High Schools

*High School* 29

*Other* 5-6 Alternative sites.

*Total number of employees by classification:*

*Certified:*

The MEA Bargaining Unit which includes Principals, Assistant Principals, instructional supervisors, teachers, mental health support professionals, librarians, counselors and, by state law, all school employees who are required to have a certificate contains 7,300 employees.

*Classified:* 7,000

*Management/supervisory:* 5 Executive managers, 25-30 Director/coordinators

*Current enrollment by level:* (120,000) Enrollment has been growing approximately 2,000 per year over the past 4-5 years. Breakdown by elementary, middle and high school is not available.

*Current enrollment by race/ethnicity*

*Caucasian:* 16%

*Hispanic:* (Some - negligible)

*Black/African American:* 84%

*Asian:* (Some - negligible)

*Current enrollment - Language:* Approximately 25 languages, mostly Asian, in very small numbers.

*Average Class Size by level:*

The figures below are staffing ratios. MEA believes that the average class sizes are close to these figures. The district has a fairly serious problem with space - and class sizes could be reduced further if space were available.

*Primary: 20*

*Upper: 25*

*Middle/Junior High: 24*

*High School: 25*

*Private School enrollments in area/trends:*

Private schools in area are mostly "white flight" schools. They are not yet seen as a threat to the Memphis public schools. Enrollment is unknown.

*School District Budget*

*Total expenditures:* \$550,147,200 The district receives funding from the following entities:

49.5% - State of Tennessee  
16.4% - Local sales tax.  
1.6% - Other local funds  
21.5% - County of Shelby  
10.4% - City of Memphis  
0.6% - Federal funds

This distribution of funding sources is important to MEA's political activity, discussed in more detail below.

*Expenditures per student:* \$4,875

**B. Significant Background Information:**

*. Union Structure/Roles*

*Officers (Names, longevity)*

*President:* Lucy Stansbury - 2 year term (The presidency alternates from white to ethnic minority every other two-year term)

*Vice President:* Lynette Tabor - 2 year term (When the President is white, the vice president is ethnic minority and vice versa.)

*Secretary:* Florestine Walton Evans - 2 year term

*Treasurer:* Jim Underhill - 2 year term

*Executive Body:*

The Board of Directors of MEA includes twenty individuals:

Four officers

Eight area directors (one white and one ethnic minority elected from each of four MEA districts)

One principal/assistant principal, terms rotate, white to ethnic minority

One instructional supervisor/consultant, terms rotate white to ethnic minority.  
One mental health position, terms rotate white to ethnic minority.  
One ESP position, terms rotate, white to ethnic minority.  
One representative to the TEA Board of Directors  
Any member serving on the NEA Board of Directors (non-voting)  
Parliamentarian as a non-voting member  
Executive Director as non-voting member.

#### *Representative Body*

The MEA Representative Council is composed of a minimum of one representative per school site, plus additional representation based on the size of the faculty. The Council, which is the policymaking body of the MEA, meets monthly during the school year.

#### *Committees Union:*

1. Membership
2. Instruction and Professional Development
3. Professional Rights and Responsibilities
4. Public Relations
5. Bargaining
6. Finance
7. Human Relations
8. Constitution & Bylaws
9. Minority Affairs
10. Status of Women
11. Men of Education - Due to lack of male participation in education, the committee's role is to encourage male students to pursue careers in teaching, to honor male educators, and to encourage males to become involved in the Association.
12. Elections
13. Memphis Political Action Committee for Education The PACE members are elected to their positions and the council selects its own chairperson. The President and Vice President are ex-officio members but are prohibited from serving as chairperson.
14. Adhoc Committee School Discipline Committees - Student discipline is a significant issue within the district. The contract provides that each school has a discipline committee with the Association Representative as a member, and with other members elected by the staff. The MEA Committee is overseeing the implementation of this contract provision.
15. Adhoc Committee on Dropout Prevention - The purpose of this committee is to research means by which the MEA can assist in reducing the number of students who drop out of school.

#### *Committees: Joint:*

No standing joint committees.

The District has a Professional Development Advisory Council composed of twelve members. The MEA has two seats on the council. The purpose of the council is to oversee the staff development program of the district.

The superintendent has created a "Superintendent's Advisory Council" which is composed of 12 members. The MEA Executive Director serves as a member of this group.

From time to time, the parties create adhoc joint committees to perform specific functions. Once the function is complete, the committee is dissolved.

*Permanent Union Staff (Names, positions, tenure)*

Wayne Pike, Executive Director, 14 years  
Ken Foster, UniServ Director, 15  
Herman Sawyer, UniServ Director, 17 years  
Vacancy  
5<sup>th</sup> UniServ Director position authorized.  
Marilyn Wilkins, Business Manager, 20 years.  
Marilyn Crawford, Executive Assistant, 7 years  
5 Support/clerical staff.

*Term limits*

Officers are limited to one two-year term and cannot succeed themselves in the same office.  
Board of Directors can succeed themselves once for a total of two two-year terms.

*Union Partnerships*

New American Schools - An eight-way partnership with the New American Schools Development Corporation (NASDC), MEA, the Memphis City Schools, the University of Memphis, PTA, Tennessee Department of Education, Partners in Public Education (PIPE) a local foundation, and The Education Commission of the States. The purpose of the partnership is to oversee the development and implementation of new teaching models in each school. This is the fourth year of the partnership. Schools that entered the partnership early had improved test scores, though the partnership has not been in effect long enough for a significant evaluation to have taken place.

NEA Keys Initiative - The Keys Initiative is a four way partnership involving Memphis City Schools, the MEA, the NEA and the specific School. This four-way partnership results in an agreement between the four entities to implement a process for the development of school improvement plans using NEA survey data from each community, historical data, etc.

MEA - University of Memphis Partnership This partnership involves an agreement to train and implement a peer assistant intern program. The objective is to credential mentors with some ten hours of training and to assign them to mentor interns and teachers who are experiencing difficulty with their teaching. The intern program will replace the concept of a student teaching assignment with an internship program resulting in the actual employment of an intern at 85% of the initial salary step. The remaining 15% of the full salary provides support and supervision for the intern through the assistance of a mentor teacher. The intern is required to sign an agreement to serve as a district teacher for three years following their completion of the program.

Memphis Labor - MEA meets on a regular basis with various representatives of labor including the Memphis Central Labor Council. Much of the relationship revolves around legislation and politics.

*Principal means of communication with members:*

MEA Action Line (Samples included) - Published 10 times per year, during the school year.  
Regular weekly meeting notices.

*Membership Engagement:*

No programs specifically under the title membership engagement. The Union does conduct an annual membership campaign - which, in 1998-99 succeeded in recruiting 693 members. Tennessee is a "right to work" state, thus no agency fee, and members have a "window" to drop payroll deduction each year.

*Significant recent budget developments (cutbacks, infusions) if any:*

Significant enrollment increases have occurred annually for the past 5-6 years has resulting in budgetary increases, in addition, the state has implemented a class size reduction program over the past several years, creating an additional infusion of new funds.

*In order to understand this district, what is it necessary to know/understand?*

MEA is well connected politically in Memphis, and exerts a great deal of influence in electing school board members, legislators, city council members and county commission members. Since the school district budget must be approved by three governmental entities, the MEA takes an active role in elections to all three governmental bodies: The School Board, the City Council, and the County Commission.

*Labor-management relationship:*

As a result of the political influence, the labor management relationship in the district has been collaborative in nature as the parties have made a definite decision to form a collaborative partnership in Memphis. As a result, several reform efforts have been launched both jointly and in some cases, unilaterally by the district but without union opposition. These efforts will be discussed in more detail in a later section of this report

*Key crises:* None

*Measured outcomes - test scores, college acceptance rates (1997-98 & 1998-99)*

Test scores are not good, though they are average among other inner cities in the nation. The Union has no documentation regarding district test scores. The attached document "Creating World Class Schools" contains limited information distributed publicly regarding "indicators of success" in Memphis schools.

*Current Superintendency:*

*Name:* Dr. Gerry House

*Background:*

Came from Chapel Hill North Carolina where she had been a teacher, guidance counselor, principal and superintendent.

*Tenure:* 7 years

*Management team:*

Five executive managers: Associate Superintendent for Teaching and Learning Academy, Associate Supt. For Finance & Business Affairs, Associate Supt. For Instruction, Executive Director Communications, Executive Director for Standards and Accountability. The District is organized around twelve clusters each with approximately 12 schools. A principal from each cluster is the cluster leader for two years, with the position rotated. All principals report to the Superintendent.

*Other employee unions (Name, approximate unit membership, relationship to teachers)*

*Secretarial/clerical:* Not Organized.

*Maintenance & Bus drivers:*

Bus drivers are contracted for with Laidlaw, and are unionized. Maintenance and operations employees are represented by AFSCME. MEA has little contact with the AFSCME local, though MEA does have a relationship with Memphis Labor through the Central Labor Council.

*Food services:* AFSCME

*Principals:* Members of MEA

*Security Staff:* Security staff is unorganized.

*Instructional assistants:* Unorganized.

*Status of contract:*

*Expiration of current agreement:* Expires in 2000

*Agency fee:* No. MEA has a membership of approximately 5,100 of a potential for 7,300.

*Binding arbitration:*

No binding arbitration. Advisory arbitration is included in the contract. The MEA processes 6-12 arbitrations per year. The school board has never overturned an arbitrator's award.

*Strikes:* One strike, in 1978.

*Unfair labor practices:* None filed.

*Significant litigation:* None

*Approximate number of grievances per year:* Approximately 30 grievances filed per year.

*Union role in community:*

*Political endorsements:*

M-PACE is the political action arm of the MEA. MEA members contribute to M-PACE through a \$10 "voluntary" contribution (50 cents per pay period) which is part of payroll deduction. MEA utilizes these funds in an active political action program. M-Pace interviews candidates (endorsement committee of 5 - requires 4 of five votes). The Endorsement Committee recommends to PACE Council, which recommends to the Board of Directors. There are 20-21

legislators that MEA has responsibility for in addition to 9 school board members elected from 7 districts and two at large seats. MEA also endorses in the city council and mayoral elections, and the county commissioners, since the district budget must be submitted to the City Council and to the County Commission for approval. An MEA endorsement means access to phone banks, financial contributions from PACE. MEA has a teacher liaison assigned to each officeholder. In addition to liaison responsibilities, the liaison is responsible for recruiting workers, and assisting with the campaign.

#### *Community engagement*

MEA has not initiated any particular community engagement programs, however the organization does have representation on many community councils and committees for example

### **C. Education Reform**

#### *Union posture:*

##### *Pro/anti reform:*

MEA has been involved in education reform since the mid 1980's, and considers itself very reform oriented.

##### *Membership attitudes:*

Membership is frustrated, as the various reform efforts require significant additional training, additional work and additional time to implement. This creates a significant degree of stress and frustration. Senior members are having more difficulty with change efforts than are the younger members.

##### *Financial commitment,*

The Association's budget reflects no specific funding for education reform other than a total of \$1100 devoted to the "Keys Initiative (see description below)," and the Instruction and Professional Development committee.

#### *Reform elements in contract:*

The MEA contract contains a letter of intent regarding School Site Shared Decisionmaking and a letter of intent detailing the rights of teachers who are involved in a school undergoing change as a redesigned school. Redesign of schools is a major program and part of a massive partnership with the New American Schools Development Corporation (NASDC) with the objective of redesigning all Memphis schools around models identified by NASDC, and other identified models of instruction (See more detailed description below).

#### *Organization/structure for reform:*

##### *Central coordinating structure:*

There is no mutually agreed upon districtwide central coordinating structure for education reform.

##### *District office structure:*

The district has an Associate Superintendent for School Reform who has broad responsibility for reform initiatives throughout the district.

*Union structure:*

There is no specific structure within the union to promote education reform.

*Responsibility (within union - leaders? Staff?)*

The responsibility for carrying out education reform within the union appears to flow through the office of the Executive Director in concert with the Association officers and the Board of Directors.

While there is no ongoing joint union-district structure for reform, the union is intricately involved in reform with the district. Primarily, the union becomes involved at the inception of a reform effort, assuring that members rights are protected, providing advice and input into the development of the reform effort, in many instances, signing off on negotiated MOU's or letters of intent. As the district implements the reform, the union plays a kind of "watchdog" role, pointing out problems or difficulties as they arise, and attempting to work with the district in finding workable solutions.

*Organization around standards*

*Implementation:*

It is unclear how deeply standards based instruction has been infused within the district. Standards have been developed and distributed to teachers. The district has authored a newsletter entitled "Teaching by Design" for distribution to the teaching staff and the district clearly expects teachers to teach to the adopted standards. According to district publications, the district staff is developing performance assessments in content areas during the current year.

*Role of union:*

There has been little to no involvement of the union in the district's development and implementation of standards based instruction.

*Development of standards:*

The District has developed standards using committees of teachers and administrators. The teachers involved were volunteers and were not appointed by the MEA.

*Training/Staff Development*

The Teaching and Learning Academy offers professional development opportunities for teachers around the issue of standards, and assessment of standards.

*Professional Development*

*Program description & Operation:*

The District has a "Teaching and Learning Academy," which plans and implements professional development in the district. A private foundation "Partners in Public Education (PIPE)" donated a building to the district, and the academy operates out of this building. The rank and file member had been generally dissatisfied with the caliber of staff development in the district. Through the Professional Development Advisory Council the leadership of MEA has worked with the District in an effort to improve the programs. Professional Development Academy programs, for the most part, are voluntary and teachers sign up to participate. School sites needing specific staff development unique to their site make requests for such programs through the academy, which attempts to work with the site. The Academy employs specialists who are familiar with each of

the instructional designs employed by schools in the district so that staff development around these school redesigns are readily available.

*Relationship to union:*

The union holds two of twelve seats on the district Professional Development Advisory Council

*Relationship to colleges/universities:*

So far, the Professional Development Academy does not have a relationship to a local university. Courses taken by teachers through the Academy do not count toward salary advancement or toward college/university credit.

*Union structure/organization:*

The MEA has no specific programs or structures to promote staff development.

*Low performing Schools*

*Program description:*

"Deregulated Schools Initiative" Begun in 1989, the MEA and the District collaborated in an experiment to foster academic achievement by closing inner city schools, then reopening them as democratically controlled school communities, with administrators and staff selected through a process that actively involves teachers and parents. The schools, three elementary schools, two junior highs and two senior highs were among those whose students had scored below their peers on state standardized tests.

The parties, MEA and the Memphis City Schools developed an addendum to their collective bargaining agreement, which provided for teachers in the closed or "deregulated" schools to move into other schools in the district with priority placement rights. Teachers new to these schools when reopened would be selected through a specified screening/interviewing process, and would receive additional salary stipends for teaching in these schools.

The schools in this program were also relieved of adherence to a selected number of district rules, policies and procedures and were provided with significant site based decisionmaking authority.

These schools have not been measured in terms of how the redesign affected the achievement of students. Further, the salary stipends were phased out after a change in superintendents about four years into the program.

*Relationship to union:*

The MEA worked with the district and developed a memorandum of understanding detailing the basic provisions of the school redesign plan, including the rights of bargaining unit members displaced by the redesign.

*Written documents:*

Several of the attached documents, including the Collective Bargaining Agreement, relate to the redesign plan.

*Evaluation of program:*

There has been no evaluation of the program.

*Incentives for school improvement - measures to raise student achievement or teacher quality:*

The MEA and MCS have developed a Performance Awards Program, which is being implemented for the first time during the 1998-99 School Year. The program involves awards to schools and teachers when the annual state and district goals have been achieved to certain benchmark percentages. Awards are to be utilized for the purchase of instructional materials, supplies, equipment and/or resources, and are specifically not to be used for individual compensation (See attached Memphis city Schools Performance Awards Program Recommendations) The program was developed by a "Performance Awards Task Force" composed of a broad based representational group within the District including the MEA President, Past President, Executive Director and teachers appointed by the MEA.

*Peer review:*

*Program description:*

The MEA, in concert with the District and the University of Memphis have developed a peer assistance program. The program has two parts. First, potential teachers, who are degreed but not certificated, can be employed by the district as interns. The intern is assigned an "induction specialist," who stays with the employee for the first two weeks of the assignment. Induction specialists are generally retired teachers and/or principals who receive training. Following the first two weeks, the intern is assigned a mentor who is an active teacher at the school site. The mentor has also received training. The intern receives 85% of the initial step on the salary schedule. The remaining 15% supports the program by providing stipends to the induction specialist, and the mentor.

The second part of the program involves assistance or support to tenured teachers who are experiencing difficulty. The details of this aspect of the program have not been developed as yet, and peer assistance to teachers experiencing difficulty has not been implemented.

*School based management/decisionmaking related to school improvement*

*Program structure:*

The collective bargaining agreement includes a letter of intent describing a site based decisionmaking commitment in broad terms. Under the letter of intent, the role of the "School Leadership Council" is to facilitate improvement of student learning. Included in the charge to the Councils is the development, approval and monitoring of the school's improvement plan, and the Council "may participate in other pertinent decisions such as the restructuring of time, space, personnel and budget." The district is, theoretically, fully under a site-based program. The program, however, is spotty at best in the sites. Principals are very hesitant to give up "power," thus the program works only in schools where the relationship between the staff and the principal is positive.

*Contract/rule waivers:*

There is no provision for contract waivers.

*Other major reform efforts (Description, scope, relationship to union)*

New American Schools Development Corporation Partnership The MEA, in concert with the NASDC, Memphis City Schools, the University of Memphis, the Tennessee Department of Education, Partners in Public Education (PIPE), and the Memphis PTA entered into an agreement to redesign all Memphis Public Schools around instructional models identified by NASDC and other agencies. The program has been phased in over four years, with approximately 35 schools implementing in the first year, 1996-97. Teams from schools attended a meeting where each instructional model was presented in brief. Teams then returned to their schools and participated in a decisionmaking process at the site

to determine which model would be appropriate for that site. The staff then voted on the selection of the model. During the first year of implementation, funds to support the model are provided through a grant from NASDC. The program is too new to have undergone a significant evaluation. There have been some problems including lack of funds after the first year funding provided by NASDC, no process for schools to reconsider a model after a period of time, the impact of staff turnover and student turnover on the efficiency of the model and others. As of the current school year, however, all sites are to have selected a model and are in the process of implementation.

Attachments:

1. 1997-2000 MEA-MCS Collective Bargaining Agreement
2. MEA Board of Directors
3. MEA Action Line - January, 1999
4. MEA Action Line - March, 1999
5. MEA Budget, 1999-2000
6. MEA Conference Presentation: "Peer Assistance Partnership"
7. MEA Conference Presentation: "How a Real Partnership was Born"
8. Memphis City Schools 1998-99 Organization Chart
9. Memphis City Schools Publications:
  - "Teaching by Design"
  - "Creating World Class Schools"
  - "Pathways"
10. "Your Keys to School Success" an NEA Publication
11. Memphis City Schools Performance Awards Program
12. Memphis City Schools "Design Selections for 1998-99"
13. "Bringing Success to Scale in NASDC Schools: The Memphis Jurisdiction"
14. MOU "Establishing and Defining a Partnership to Implement Education Reform in MCS"
15. Strategy Paper: "Bringing Success to Scale in the Program of the NASDC"
16. MEA Constitution and Bylaws
17. MEA UniServ Employment Contract