

**San Diego Education Association, CTA/NEA
10393 San Diego Mission Road #100
San Diego, CA 92108**

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Data Collection: Bill Harju, Interviewer
Data Source: Marc Knapp, President
Robin Whitlow, Executive Director

A. Demographics

Number of Schools: 179

Elementary 124

Middle/Junior High 23

High School 16

Alternative: 2

Continuation: 7

Special Education Schools: 4

Creative & Performing Arts: 1

Secondary math/science/computers (7-12): 1

Total number of employees by classification: 16,756

Certified: 8559

Classified: 7476

Management/supervisory: 681

Current enrollment by level: 134,323

Elementary 75,096

*Middle/Junior High:*24,740

High School: 31,286

Other: 3201

Current enrollment by race/ethnicity

Caucasian: 28%

Hispanic: 36.4%

Black/African American: 16.8%

Asian: 18.3%

Native American: 0.6%

Current enrollment: Language: 38,768 (28.8%) of the students are English Language Learners.

Average Class Size by level:

Primary: 20

Upper: 32

Middle/Junior High: 28.7

High School: 29.1

Private School enrollments in area/trends:

Private school enrollment in 1998-99, throughout the entire county of San Diego (San Diego City Schools student population represents approximately one third of the public school enrollment in the county) was 42,177. Previous year figures: 97/98: 40,852; 96/97: 39,657; 95/96: 37,271; 94/95: 37,069; 93/94: 35,863

School District Budget

Total expenditure: \$1,203,288,994

Expenditures per student: \$6,637

B. Significant Background Information:

. Union Structure/Roles

Officers (Names, longevity)

President: Marc Knapp 3 years (9 years on Board of Directors)

Vice President: Maryanne McDonald 3 years

Secretary: Celina Mann 3 years (Board of Directors 9 years)

Treasurer: Grace Whitley 2 years (Board of Directors for 6 years)

Executive Body

SDTA has a 16 member Board of Directors composed of the officers and 12 directors. The directors are selected from four geographical regions, with each region having an elementary, a secondary and an at-large director. The Board of directors is the administrative body of the Union, and has the authority to approve presidential appointments, to contract with SDEA Staff, to establish the dues level within the parameters established in the bylaws.

Representative Body

The Representative Council is the SDEA policymaking body. The Council is made up of one representative from each work-site, with additional representatives allocated based upon one representative for each major fraction of fifteen members on the site. The council meets monthly

during the school year and once during the summer months. A quorum is established each year, and is approximately 100 council members average attendance is approximately 150. If all members were in attendance, the council would number about 350.

Committees Union:

1. Bargaining Council
2. Bargaining Team
3. Finance Committee
4. Political Action Committee (SDEA-PAC)
5. Human Rights Committee
6. Ethnic Affairs Committee
7. Grievance Committee
8. Special Education Committee
9. Support Staff/Itinerant Committee
10. Bilingual Committee
11. Social Committee
12. Recognition
13. Instruction and Professional Development

Committees: Joint:

Contract Administration Committee - Composed of five representatives of the district and five representatives of the union. Meets monthly to iron out problems with the administration of the contract, and to attempt to resolve problems that arise between the parties.

Calendar Committee - Includes representatives of all unions in the district and community representation. Attempts, usually successfully, to reach consensus on the annual school calendar both for traditional and year round schools.

Elementary Preparation Time Committee - Composed of equal numbers of representatives of each party and charged with administration of the elementary preparation time provisions of the contract, including the assignments of preparation time teachers.

Health and Welfare Benefits Committee - Includes representatives of all unions in the district, the human resources department and the principal's organization. Charged with review and recommendation on all health and welfare benefits programs of the district.

Inclement Weather Task Force - an Adhoc committee charged with development of a plan for dealing with inclement weather in certain parts of the district, and particularly on the east end of the district, where temperatures in non-air conditioned classrooms can reach temperatures of 100 degrees and up, primarily during the months of September and October.

Mentor Steering Committee - A committee composed of a majority of teachers charged with implementation and administration of the California Mentor Teacher Program as it applies to the District.

Intern Coordination Committee - A Joint Committee charged with monitoring the intern programs of the district which include a special education intern program, a minority intern program, a bilingual intern program and a math/science intern program.

Institute Planning Committee - A joint committee composed of approximately fifteen members with union, District and principal representation, to review and propose programs and modifications including instructional issues and staff development issues.

Permanent Union Staff (Names, positions, tenure)

1. Executive Director: Robin Whitlow - 1 year
2. UniServ Field Organizers:

Marlene Fong, 11 years
Steve Kaplan, 10 years
Donald Moore, 5 years
Donald Crawford, 2 years (SDEA President, 2 years, 25 years as a district teacher)
Gail Boyle, 1 years (SDEA President for 4 years, district teacher for 25 years)

Term limits

SDEA has term limits for Board of Directors and Officers. Members are limited to two two-year terms in the same office.

Union Partnerships

San Diego Labor Council - Several joint programs with the labor council, primarily around issues and around political activity.

Parent Institute - SDEA and the Parent Institute, in concert with the University of California - San Diego has worked collaboratively on creating greater parent involvement in a selected number of elementary schools within the district, testing whether increased parent involvement increases student achievement.

San Diego State University - A partnership around creating and operating a Charter School which is opening in the fall of 1999, after a 2 year planning phase.

San Diego State University and the Price Foundation - A partnership around creation of a cluster of low achieving schools in the center city, with emphasis on improved preservice training for potential teachers who are students at San Diego State. The program involves after school and before schools tutoring, child care. In addition, the partnership will work to coordinate the school program with San Diego Zoo, local medical facilities, police department and social services agencies.

Lynch Foundation - A partnership around the topic "San Diego Reads," which is an effort to solicit donations of millions of books for placement in classrooms throughout the city. In addition, the partnership is involved in creation of a training program and a support system for teachers seeking National Board Certification.

Edna McConnell Clark Foundation - A partnership around a grant involving the production of lessons in academic areas for middle school teachers.

Principal means of communication with members:

SDEA Advocate - Professionally printed monthly tabloid.
SDEA "Little Advocate" - As needed newsletter printed about 12-14 times per year.
SDEA Website
Computer telephone system that permits 3-400 taped messages to be sent in an evening.
E-mail access to most members, and specifically to representative council.

Membership Engagement

Polling: SDEA has just completed a scientifically designed random sample telephone poll conducted by an outside polling agency. The Poll was designed to obtain data from the members regarding SDEA programs both present and future.

Site Visits - The President and Executive Director conduct site visits throughout the year.

Training Schedule - SDEA has an annual training schedule for membership including topics such as classroom management for teachers with five years or less experience, conflict management skills, enhancing partnerships at the site, improving PR at the school site, Grievance training, Know your contract, site governance team training, etc.

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

The new district administration has cut back 100 positions in the district in order to create up to 100 peer coach/staff developers at the school site.

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

SDEA and the District have a long history of adversarial relationships which has included a series of superintendents, prior to the 1980's, with a top down, military style of management. The first 10 years of collective bargaining in California (1977-1987) resulted in a series of one-year contracts, or two-year agreements settled in the spring of the first year. In the late 1980's, the SDTA President and a former Superintendent (Tom Payzant) met over the course of the summer and worked out a conceptual agreement resulting in a four year agreement (1988-92) and an era of relative labor peace. Payzant left for the Clinton Administration's Education Department, and a new Superintendent - and 30 year district employee - took over, as well as a new SDTA President, and, ultimately, led the parties into a 5 day strike in February, 1996. Following the strike, a more conciliatory atmosphere took over, and the parties began to work toward a much more collaborative style than had previously been the case. The superintendent, however, fell into bad times with the School Board, resulting in non-renewal of her contract, and the district searched for a "non-traditional" superintendent, settling on Alan Bersin, the former U.S. Attorney for the San Diego region, who had built his reputation as the "Border Czar," who slowed illegal immigration from Mexico to the U.S. This new superintendent, with strong political backing from the Chamber of Commerce, has attempted massive top down changes in the district during his first year, and has caused the relationship to revert again to an adversarial one, with morale, as reported in the SDEA poll, lower than it had been just prior to the 1996 strike. The poll also demonstrated very high teacher satisfaction with the union, and with their building principals, but with very low satisfaction with the direction and attitude of district administration and school board.

Labor-management relationship:

The District has recently hired a new Assistant Superintendent for Human Resources, who appears to be a problem solver. Human Resources, traditionally, have been slow, difficult, but amicable.

Key crises:

During the 1998-99 School Year, the new Superintendent and his newly created "Chancellor of Instruction," determined, unilaterally, that each school in the district needed a person who was a peer coach or a staff developer. The Union responded to the proposal with a proposal of its own, and negotiations ensued. Over the course of the school year, the negotiations became bitter and public, with each side attempting to glean public support for their position, and with the superintendent moving to unilaterally impose the program when it appeared that negotiations would be unsuccessful. While, ultimately, the parties reached an agreement, the protracted and heated nature of the discussions have led to serious mistrust on both sides.

The new Chancellor of Instruction began the 1998-99 school year with unilateral implementation of a literacy focus at the elementary level a focus which was thrust upon the staff overnight without any consultation with the union, teachers. Although during the preceding 1997-98 year, the parties had spent a great deal of time and energy reviewing and selecting a new reading series that teachers had been preparing to implement the start of the year, this program was rejected in favor of the new focus. Additionally, newly appointed administrators called "instructional leaders" began visiting classrooms, taking notes, then writing letters to the principals, praising and criticizing with no feedback to the teacher whose classroom was being observed. These instructional leaders had no particular skill in classroom evaluation. For example, one was a former coach, PE teacher, high school principal, who was evaluating teaching skills in a primary classroom.

These activities created a crisis atmosphere for the union and its members, culminating in a 3000 teacher demonstration in mid-May, 1999, protesting the top down management styles of the new district leaders.

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

Test scores are increasing slowly, as has been the case over the past several years.

Current Superintendency:

Name: Alan Bersin

Background:

Attorney, friend of Bill Clinton and Al Gore, former US attorney for San Diego, and known as the "Border Czar"

Tenure: 1 year

Management team:

Bersin's administration is run as a pyramid. He has a chief of staff who was a bodyguard, a covert operations specialist in South America who controls all contact with the superintendent. Originally, nearly all of the previous assistant superintendents were demoted, fired, or otherwise terminated, and newly appointed "instructional leaders" were employed. An Institute for Learning was created, with a well-known national administrator placed at its head, who works for the district an average of 2-3 days per week and continues to live on the East Coast. Additionally, the district now hires dozens of outside consultants to fly in and perform various tasks. As a result of this reorganization, several of the best administrators in the district are jumping ship, many even to lateral positions, in order to get out of the situation.

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

Secretarial/clerical: California School Employees Association - an independent

Maintenance/Bus drivers: California School Employees Association

Food services: California School Employees Association

Principals: Administrators Association of San Diego - affiliated with Association of California School Administrators

Security Staff

A relatively small school police force is organized under the Police Officer's Association, and affiliated with a statewide POA.

Paraprofessionals California School Employees Association

SDEA's relationship with the other district unions and associations varies with the issue. There have been efforts at mutual cooperation around bargaining goals, health and welfare benefits, and to a lesser extent, endorsement of school board candidates and support for and against ballot issues.

Status of contract:

Expiration of current agreement: August 31, 2001

Agency fee: yes

Binding arbitration: yes

Strikes:

Two strikes, one in 1977 for four days and one in 1996 for five days. There was also a wildcat AFT strike in 1974 which lasted one day.

Unfair labor practices: None

Significant litigation: None

Approximate number of grievances per year:

Approximately 50 per year - 5-7 arbitrations per year.

Union role in community:

Political endorsements:

SDEA has a political action committee (SDEA-PAC) that raises money through voluntary contributions of members. The PAC interviews candidates and makes recommendations to the Board of Directors who reviews the recommendations, and passes them on to the Representative Council. The council has the endorsement authority, by a two-thirds vote. Endorsement by SDEA means financial contributions, independent campaigns on behalf of recommended candidates, workers, etc.

Community engagement:

Under a grant with PACBELL, SDEA is working in the Polinski Center, a home for students who have been removed from their homes. Teachers go into the Center; they provide an enhanced program similar to tutoring, for students in the home, including the provision of books to students in the home.

San Diego Reads: A Community Agency of which SDEA is a part, that provides books to schools through voluntary donations.

Public Service Drive-Time Announcements: A pro-public education drive time radio commercial which will be on several local stations promoting public education and teachers.

Community Newsletter - A quarterly newsletter mailed to a substantial list of SDEA community contacts.

SDEA Liaison to PTA SDEA appoints an annual representative from the Board of Directors to the district-wide PTA Council.

CPIE - Operation Doorstep SDEA cooperates with the Council for Parent Involvement in Education (CPIE) in helping to recruit parents to participate in a six session parent involvement program offered to parents in low income areas of the San Diego community.

C. Education Reform

Union posture:

Pro/anti reform:

SDEA considers itself to be strongly supportive of collaborative education reform. Currently, with the new administration, attempts to collaborate have been difficult if not fruitless.

Membership attitudes

The recent SDEA Poll shows that members are in favor of reform, however, concerns were expressed with legislators creating program after program with no ability to test the effectiveness of a program over time. Members are supportive of collaborative, stable reform not the reform in a box, or day by day reform which has been the practice in recent years.

Financial commitment

SDEA has a \$100,000 commitment to a community campaign designed to demonstrate SDEA's advocacy of reform

SDEA's training program including staff time and types of training in instructional and reform issues amounts to approximately another \$80-100,000.

Reform elements in contract:

Organization/structure for reform:

Central coordinating structure:

The Institute Planning Committee (IPC) is designed to be a joint structure for coordination of reform, however, up to this point, has not served such a purpose since the administrative leadership of the institute has come to the meetings with their plans, and has simply imposed them on the IPC.

District office structure:

Upon his employment on July 1, 1998, Superintendent Bersin recruited Anthony Alvarado from New York City, and bestowed him as the head of a new "Institute for Learning," which is designed to be the district structure for reform. Thus far, the Institute has imposed reforms, primarily in the area of reading and literacy, in a top down fashion.

Union structure:

Board of Directors and staff

Responsibility (within union - leaders? Staff?)

Responsibility for implementing SDEA sponsored or endorsed reforms rests largely with the President, the Executive Director and the UniServ Staff.

Organization around standards

Role of union: The union has not been involved.

Development of standards:

Standards have been in the developmental process since the 1996-97 School Year. An original set of standards were developed by administrators and teachers selected by the administration. The Standards were in a volume of approximately 1500 pages, and were adopted in December 1997, as preliminary in the areas of language arts, social studies, math, science. The school board mandated that administrators go back and develop standards in elective areas. In 1998, finalized standards were yet to be developed, and the administration changed on July 1. The current status regarding standards is confused, however a final document has been adopted by the board in all areas of the curriculum. Teachers at many sites are unaware of what these standards are. Further, the district standards and the state standards are not in alignment, and the assessment practices are not in alignment with the standards.

Training/Staff Development

No significant training or staff development.

Professional Development

Program description & Operation:

Under the previous Superintendent, the District, in collaboration with the SDEA, had obtained a substantial grant from the Rockefeller Foundation to support the development of a joint infrastructure for Staff Development that would result in site driven staff development aligned with district curriculum, standards and assessments. As a result of the top-down style of management under the new administration, the Rockefeller Grant has been put on hold, and previous progress has been halted.

The new administration's approach to staff development is embodied in the appointment of staff developers at each site who will serve as staff development resources for the schools. (See "Key Crises" above)

Low performing Schools

Program description:

A large representative task force with members from the community, the union and the district worked for over two years to develop an accountability framework that was implemented initially during the 1997-98 school year. The program includes providing each school with data from test scores, dropout rates, transiency rates and other data. Utilizing the data, the school develops a plan. The plan is approved, implemented, reviewed, and schools in trouble are then provided with support through an intervention process. If the school is unsuccessful in improving

achievement, various sanctions can be imposed including intensive monitoring, staff changes, and ultimately closing a school.

Relationship to union:

The union was intricately involved in the development of the accountability plan.

Implementation issues:

The new superintendent is not happy with some of the details of the accountability framework, and is seeking change. A dispute exists as to whether the framework can be unilaterally modified by the district, or whether the original task force must be reconvened to consider the modifications.

During the first year of implementation, several schools were publicly identified as low performing schools, creating a significant backlash and a morale problem among the staff and community at these school sites.

Personnel - Transfer

The transfer provision in the contract provides that when a bargaining unit member is to be transferred involuntarily due to several circumstances, including a possible school closure, the unit member is permitted to select a any position, by seniority order, that becomes vacant during the period immediately following the school closure and prior to the start of the ensuing school year.

Evaluation of program (formal, informal):

Thus far, there has been no formal evaluation of the program.

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

None

Peer review:

Program description:

SDEA will be bargaining a peer review program during the 1999-2000 school year, as a result of legislation adopted by the California Legislature.

School based management/decisionmaking related to school improvement

Program structure:

San Diego has a long history of working toward shared decisionmaking. Several task forces including representation from the Union, District and Community have been formed to work on the issue over a ten-year period. One of the issues in the 1996 SDEA Strike involved the authority of site teams. A fairly detailed document establishing the makeup of site teams, the authority of site teams, and the process for resolving disputes has been adopted by the School Board, and supported by SDEA. Each school site has a Governance Team composed of 50% members of the teacher bargaining unit plus representation from administration, classified employees, and parents.

Role of site teams:

The role of site teams includes involvement in development and implementation of the site plan, involvement in the hiring process at the site level, and authority over portions of the school site budget. Whether or not site teams actually fulfill their role is based upon relationships at the site. Many principals are unwilling to concede real decisionmaking to site teams, and without a strong staff leader, these schools operate with the principal as the key decisionmaker.

Contract/rule waivers:

The SDEA Contract provides for the possibility of waivers, which must be approved by both SDEA and the District. Several waivers are proposed and approved each year, most around issues such as the school calendar, student grouping, and the process for selection of summer school teachers at sites.

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

SDEA Charter School SDEA is one of several NEA locals to have participated in a NEA program to develop a union sponsored charter school. Following a two year planning process when SDEA has received support from both CTA and NEA, the SDEA Charter School is opening its doors in the fall of 1999. During this, the startup year, the school will be a K-6 school with seven teachers and 200 students. Ultimately, the school will be a K-12 school and will emphasize teacher training through a partnership with San Diego State University, and with access to NBPTS Certification

Attachments:

1. 1998-2001 Collective Bargaining Agreement
2. SDEA Constitution
3. SDEA Bylaws
4. SDEA Budget
5. SDEA Advocate, June 21, 1999
6. SDEA Advocate, August 27, 1999
7. "SDEA "Little Advocate" packet, beginning page, April 30, 1999