

**June 8, 1999**  
**Washington Federation of Teachers**  
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## **A. Demographics**

*Number of Schools:* 153 School Sites

*Elementary* 104

*Middle/Junior High* 23

*High School* 17

*Other*

9 Special Schools. In addition, Washington has 19 Charter Schools. DC has one of the most liberal charter laws in the country - two chartering agencies one elected one appointed - up to 20 new charters can be granted each year. Charter school funding is taken from the district budget, roughly \$5,000 per child, goes directly back to the charter.

Ward three in Washington (Northwest) contains some district schools that are operated in a quasi-private fashion, even including one school with 40 teachers that are not on the district payroll, but are funded by parents.

*Total number of employees by classification:*

*Certified:*

5195 teachers - 4600 eligible WTU voters - with agency fee. Probably will be an additional 2-300 in 1999-2000 due to a lower class size push at the primary level.

*Classified:* Unknown

*Management/supervisory:* Unknown

*Current enrollment by level:*

71,007. Approximately 6,000 students have moved to charter schools (not counted in district enrollment), thus a year ago, the enrollment was closer to 77000

*Elementary:* Unknown

*Middle/Junior High:* Unknown

*High School:* Unknown

*Current enrollment by race/ethnicity*

*Caucasian:* Unknown

*Hispanic:* Unknown

*Black/African American:* Unknown

*Asian:* Unknown

*Current enrollment Language:*

Small ESL programs- Hispanic, Asian, Haitian. ESL programs are concentrated in neighborhoods - thus politics of ESL programs would be neighborhood oriented.

*Average Class Size by level*

Staffing ratio is 25-1. Actual class sizes are unknown at this time. The collective bargaining agreement contains class size limits as follows: K through 2 - 20; 3 through 6 - 25; secondary academic classes - 25; remedial classes - 12; industrial arts/home economics - 18. There are also class size limits for various special education classes. The enforceability of the language is questionable, as class sizes may be altered due to 6 criteria including insufficient funds; lack of space, adhering to class size would result in half time or part time classes, etc.

*Primary:* (Unknown)

*Upper:* (Unknown)

*Middle/Junior High:* (Unknown)

*High School:* (Unknown)

*Private School enrollments in area/trends:*

Significant private school population - Many government officials send their children to a number of elite private schools. There is a large parochial school population, primarily Catholic - 4-5 large catholic high schools plus feeder schools. Private schools overwhelmingly white middle class; parochial schools are primarily lower class African American and Hispanic.

*School District Budget*

*Total expenditures:* \$567,099,000 (1998-99)

*Expenditures per student:* \$7228 (1997-98)

**A. Significant Background Information:**

*. Union Structure/Roles*

*Officers (Names, longevity)*

President: Barbara Bullock, just elected to third two-year terms - (Involved in union leadership for many years prior)

General Vice President: Esther Hankerson, (4 years - just reelected)

Treasurer: James Baxter, (actual longevity unknown - many years)  
Recording Secretary: Janice S. Spencer (6 years)  
Vice President, Senior High: Jerolyn Spicer (6 years)  
Vice President, Junior High: Julia Little (6 years)  
Vice President, Elementary: John H. Traina (6 years)  
Vice President, Special Services: Urman C. Edwards (6 years)  
Vice President, Special Education: Brenda G. Jenkins (6 years)  
Vice President, Career Development: Delores H. Haynes (6 years)

#### *Executive Body*

The Executive Council is the administrative body of the WTU. The council meets at least monthly and more frequently as necessary. The Council includes the officers listed above, and two Senior High, two Junior High, four Elementary, and three Special Services members elected at large from among the specified constituency.

#### *Representative Body*

There is no representative body. The membership is the policy making body, which meets at least monthly, with a quorum requirement of approximately 100, and with average attendance around 175.

#### *Committees Union:*

##### Bargaining Committee

COPE Committee which has a dues checkoff that is entirely voluntary - membership is small. In the September, 1998 election, the COPE Committee and the WTU was a major influence in the mayor's primary race, doing phone banking, door to door walking, poll watching, etc. This effort was then duplicated in the November election, and the mayor, Anthony Williams, won the election with WTU support.

Membership Committee  
Staff Development Committee  
Grievance Committee  
Elections Committee  
Constitution Revision Committee

#### *Committees Joint:*

Joint Extra Duty Pay Committee - Reviews and recommends stipends for drama, music, sports, etc.

Joint Committee on Teacher Evaluation - Review and develop actual evaluation procedures for DC teachers. The committee was removed by Congress and the administration has unilateral authority, though the administration has provided the WTU with representation.

School Performance Incentives This is a new joint committee contained in the newly ratified agreement covering 1998-2001. The purpose of the task force is to develop standards to be used when evaluating contractual criteria for school performance, to develop a formula for distribution of funds to improve schools, and to generally oversee the implementation of the school performance incentive program. Some preliminary meetings have been held, though this committee is in the new contract which has not been formally ratified as of yet.

Teacher Performance Incentives The new agreement contains a provision for a joint District-Union task force established to develop a Teacher Performance Incentive (TPI) Program. The task force is to review National Board Certification, family and community involvement, professional

development, leadership, responsibility and other criteria and to develop a formula for distribution of funds set aside for the program. The Contract provides that 1.5% of the 1999-2000 salary increase will be devoted to this program, and 2% in the 2000-2001 year.

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

Field Representatives:

Rachel Hicks  
Charles Moore  
Henry Collins  
Anita Corley

Executive Assistant:

Gwendolyn Hemphill

Legislative Representative:

Doris Mathis

Dental/optical/membership & Sick Leave Bank Administrator:

Karla Russell

Retiree Coordinator

Connie M. Pendergrass

In addition, the WTU lists its President, General Vice President, and Treasurer as staff.

*Term limits*

No term limits.

*Union Partnerships*

The WTU has a partnership with Southeastern University. The partnership involves Union members receiving reduced tuition when attending the University, and also includes the co-sponsorship of a Master's Degree Program in Public Policy with an emphasis in education.

Trinity College - Another partnership with Trinity College results in the co-sponsorship of a master's program and graduate courses.

*Principal means of communication with members:*

President's Perspective - Former major means of communication, cancelled by a vote of the membership due to the perception that it was all "good news."

Washington Teacher - A quarterly newspaper.

Membership Meetings

Hotline phone number

Letters to membership

*Membership Engagement*

WTU does several surveys for bargaining.

Initiative to redesign low performing schools - The WTU is involved, jointly, with the district, in a grassroots program to redesign low performing schools.

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

\$62 Million deficit during the 1997-98 year - the result was layoffs - though without teacher layoffs. Cause of the deficit was miscalculation of expenditures, and was discovered in the course of an external entity that was auditing the books for the Control Board that had been appointed by Congress.

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

A "Control Board" was established by Congress three years ago, and replaced the school board and the city council. The Control Board was established to oversee the governance of the district. The Education budget is a department of the city of Washington. The members of the Control Board were appointed by Congress to determine policy, budget, and staffing for the District. The Control Board appointed a "Board of Trustees" to control the school district. An elected Board of Education exists - but its' powers have been stripped until 2002, when the powers will revert back to the district, provided that budgets are balanced over a period of years. The Control Board is beginning to release power back to local control - including the acceleration of power back to the local elected school board. Initially, the control board appointed a general to manage the schools - Julius Becton - who assumed control of the schools for approximately 1.5 years. He searched for an Academic Officer, finally appointing Arlene Ackerman of Seattle who worked under Charles Sanford the recently deceased Superintendent in Seattle. Ms. Ackerman is now the Superintendent. The agenda of the current elected school board, when their power is restored, is to fire the superintendent.

*Labor-management relationship:*

Since General Becton was appointed, the relationship between the union and the district has improved tremendously. Both the AFT and the local have offered to assist in turning around DC schools. The General accepted the offers of support, and the relationship became positive - a reversal of the relationship of the past. Regular meetings with Ackerman began almost immediately upon her appointment, and the parties are working jointly to establish a school improvement plan.

*Key crises:* Unknown

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

Attachment \_\_\_ "District of Columbia Public Schools Baseline Budget" includes a graphic which demonstrates that DC Public School students are achieving below the national average on the Stanford 9 test in both reading and math.

*Current Superintendency:*

*Name:* Arlene Ackerman

*Background:* Came from Seattle, was a deputy superintendent there.

*Tenure:* 2 years

*Management team:*

The Management team is incomplete. Lois Brooks, Deputy Superintendent; Joe Carillo, Associate Superintendent; Katrina Robinson Reed, Associate Superintendent for Human Resources, and six to eight Assistant Superintendents. Attachment \_\_, " District of Columbia Public School Baseline Budget" includes an organizational chart for both the district as a whole and for the Academic department.

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

*Secretarial/clerical:* AFSCME

*Maintenance/Bus drivers:* Teamsters

*Food services:* Teamsters

*Principals:* Council of School Officers - AFL/CIO

*Security Staff* Unknown

*Instructional Aides:* AFSCME

WTU maintains a Relationship with the other employee unions through the DC Central Labor Council; however, the relationship is not close and needs nurturing.

*Status of contract:*

The WTU had been without a contract since September 30, 1994 and negotiations have been going on from time to time for five years. The parties recently reached an agreement, retroactive to 1998, which expires on September 30, 2001.

*Agency fee:*

The contract contains an agency fee provision which requires that non-members pay a service fee to the Union equal to eighty five percent of the WTU dues.

*Binding arbitration:* Yes

*Strikes:* none in past 20 years.

*Unfair labor practices:*

None filed recently by the union. There is one filed against the union and the district by members of the bargaining unit. The case is in process.

*Significant litigation:* None

*Approximate number of grievances per year:* 200 grievances - 10 - 15 arbitrations.

*Union role in community:*

Political endorsements: WTU endorses candidates in the school board and city council races as well as providing voter information for races in Maryland (many WTU teachers live in Maryland).

*Community engagement*

Very limited community engagement activity. Tends to be on an issue by issue basis - when approached by community organizations. No on-going effort.

## **A. Education Reform**

*Union posture:*

*Pro/anti reform:*

The WTU considers itself to be a pro-reform union, and the Union is willing to consider change in an effort to improve the situation in the DC schools. The WTU approached the Control Board appointed Superintendent Julius Becton to initiate discussions regarding the need to reform DC schools.

*Membership attitude*

Membership is not at the same level as the leadership. There is reluctance on the part of many teachers to become involved in reform. Teachers are not comfortable with being evaluated based on test scores, etc. There is some reticence regarding the performance incentive plan. As a result of this reticence, there has been some internal dissension. As a result, there were two opposition slates vying for leadership in the most recent WTU internal elections. These two slates drew approximately 43% of the vote.

*Financial commitment:* Unknown

*Reform elements in contract:* (Attachment \_\_, Collective Bargaining Agreement)

1. Preamble: The Collective Bargaining Agreement contains a new preamble, which commits the parties to a collaborative relationship around the improvement of student achievement in DC schools. As part of the preamble, the parties commit to developing joint recommendations to policymakers by the end of December, 1999. Recommendations are to include, but not be limited to:
  - 1.1 School based management and budgeting.
  - 1.2 Certification
  - 1.3 Early intervention and prevention of inappropriate referrals to special education.
  - 1.4 Professional and staff development.
  - 1.5 Parent outreach and support.
  - 1.6 Workload standards.
  - 1.7 Peer intervention and review.
  - 1.8 Local school restructuring.
1. Article XVIII - General Provisions Relating to School Operations, Section K: Department Heads are elected by the teachers in the department.
3. A joint Union-District Task Force is developing article XL -Compensation - Provides for a 1.5% and 2% salary increases in successive years to be devoted to a Teacher Performance Incentive Program which.

4. Article XLIV - School Performance Incentives - Establishes a joint process for the development of a school performance incentive system that financially rewards schools for improvements in performance.
1. MOU - Teacher Performance Incentive Program Establishes a joint task force to develop and implement a Teacher Performance Incentive program utilizing the funds provided in the compensation article referred to above.

*Organization/structure for reform:*

*Central coordinating structure:*

A DC Team consisting of Superintendent, Union President and Vice President, Staff from AFT, and a Vice President of the UFT in New York City has worked for two years on school reform.

*District office structure:* Unknown

*Union structure:*

No specific union structure

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

WTU Executive Board

*Organization around standards*

*Role of union:*

The WTU appointed some members of the teams who have developed and are developing standards for implementation in DC public schools. WTU has also assumed a role in training Building Representatives and the Executive Board on the standards project, and appointment of some members to serve in the arena.

*Development of standards:*

Teams of teachers and administrators have been involved in developing standards during the past two years. Some standards are in place; others are still in the process of being developed.

*Training/Staff Development*

There has been some training for teachers in implementation of standards. Training is still continuing. Each school has a standards specialist who participates in district training sessions then passes the training on to their staffs.

*Professional Development*

*Program description & Operation:*

WTU offers inservice courses and Ph.D. courses through the union. Every teacher must have 15 seat hours per year between July 1 and June 15. Hours must be centered around standards - this was established by the Superintendent. 1998-99 was the first year. The Union's program is

funded through a \$50 fee per member to pay for instructors. The training is offered at school sites and the program is coordinated by a WTU staff person.

The District has a Professional Development Institute that offers seat hours, courses, and workshops. The District employs a staff to do training, they use resources from among the teaching ranks, and they pay outside consultants.

Every five years, the teacher in DC must take six credit hours to maintain their credential.

*Relationship to colleges/universities:* Unknown

*Union structure/organization:* See above.

### *Low performing Schools*

*Contract/policy/procedure? Language?*

There is current contract language in both the Preamble and in article XLIV - School Performance Incentives (Attachment \_\_, Collective Bargaining Agreement), as well as policy language to implement a low performing schools plan.

*Program description:*

A DC team was formed including the Superintendent, the President and Vice President of WTU, an AFT Staffer in the Educational Issues department, and the Vice President of UFT in New York City. The Team began meeting in spring of 1997 to develop a plan for addressing low performing schools. Much time was spent crafting an overall plan. The team determined that schools should be evaluated annually, based on measured criteria which would be used to identify low performing schools - called "Targeted Assistance Schools" (TA Schools) in DC. What structures and supports should these schools have? What should be in place for succeeding groups of schools? The parties developed a process for redesigning those schools that did not improve on the SAT 9 within a school year. Without a ten- percent improvement, the TA school would be closed and redesigned with up to 50% of the staff changed. A personnel process including personnel committees would be established to interview and select the new staff - both new to the district and those transferring. The TA schools are required to establish a school plan that includes a research based educational program that works. The DC plan also includes accountability for principals so that principals are evaluated based upon their schools performance. So far, only one school has been closed and redesigned. This one school has been totally restaffed - and the school has been quiet this year. Teachers are also held accountable through a new teacher evaluation instrument which includes requirements for a specific amount of professional development related to teaching practice. Teachers whose ratings are in "needs improvement" or "unsatisfactory" must develop, with their principals, an improvement plan, must receive remediation or assistance, and must show improvement within 90 days of the beginning of the implementation of the plan. The DC team also developed a team of master teachers or helping teachers whose full time job it would be to help the teachers in intervention. 1998-99 is the first year, and is designated as a pilot year with the program to be re-evaluated in the summer of 1999. There is a teacher performance incentive built into this program in the amount of 1.5% of salary pool for 1999-2000 and 2% for 2000-01 in addition to a 4.5%, 3.5% and 3% across the board increases. The criteria for the performance incentive funds will be developed jointly.

*Relationship to union:*

The program was jointly developed by the parties, and is being jointly implemented.

*Evaluation of program* The program is new and is yet to be evaluated.

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

Both the School Performance Incentive Program and the Teacher Performance Incentive Program address this issue. The parties have provided funds for both programs, including a 1.5% and a 2% salary increase for the Teacher Performance Incentive Program and an unknown amount for rewards to schools that improve student achievement. The funding begins in the 1999-2000 school year, and both programs are in the process of joint development.

*Peer review:*

*Program description:*

The DC Team developed a set of Master Teachers who are charged with providing assistance to teachers who are under an improvement plan related to a new teacher evaluation system being implemented. The preamble to the collective bargaining agreement also contains a commitment by the parties to develop recommendations for a peer assistance and review program. These recommendations are to be developed by the end of December 1999.

*School based management/decisionmaking related to school improvement*

*Program structure:*

There has been a site based management program in effect in DC. The program has been a very high priority in ward 3, but not so high in other areas, and is very dependent on the school leadership. There is limited language in the contract. The Contract provides for a "School Chapter Advisory Committee," at each site. The SCAC is a union committee that meets regularly with the principal (Attachment \_\_, Collective Bargaining Agreement, Article IX). In addition, the district, since spring, 1998, has been in the process of implementing a district policy creating a "Local School Restructuring Team" (LSRT) at each school site under a mandate from the Superintendent. The district is evolving a procedure where sites receive all of their funding, and must, through the LSRT, develop an annual plan for the expenditure of the funds. The newly ratified agreement includes provisions requiring that initiatives of the LSRT be approved by the SCAC. Further, the LSRT is prohibited from changing or superseding any contractual agreement, Board Rule, systemwide policy or procedure.

*Role of site teams:*

The role of the site teams is to develop the school site plan under very detailed instruction from the district office. The LSRT also advises the principal on a number of school organizational issues including allocation of resources, organization of the school, curriculum options, etc.

*Site budgets:*

The District appears to be moving toward a position of a system of schools whereby funds are allocated to the school site, and the site is granted a great deal of autonomy in utilizing those funds. The policy manual provides for broad based site decisionmaking, but also provides that the Principal is accountable for the school, thus the LSRT, at least at the outset, appears to be advisory.

*Contract/rule waivers:*

There is no provision for contract waivers or rule waivers.

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

Weighted Student Formula The District will implement a weighted student formula budgeting system for the 1999-2000 school year. Schools have been presented with an extensive planning guide sections of which have been produced and attached (See Attachment 10 - Local School Planning Guide - selected pages). The planning guide and the weighted student formula - which are patterned after a similar plan in Seattle, provides school sites with a detailed map for the development of an annual school plan, including the funding formula based upon the types of students assigned to the school, which will be used to allocate funds. The program will be new in 1999-2000, and has yet to be evaluated. The program was developed jointly by the district and WTU.

Attachments:

1. WTU History: "Foreword"
2. WTU Constitution and Bylaws adopted March 16, 1981
3. Tentative Agreement, October, 1998 through September 30, 2001 (Since ratified)
4. List of Schools (6 pages beginning with Division I)
5. District of Columbia Public Schools Baseline Budget, FY 1999
6. District of Columbia Public Schools Preliminary Weighted Student Allocation for FY2000
7. Establishment and Operation of Local School Restructuring Teams - May, 1998
8. Just the Facts - Update #1 - Weighted Student Formula
9. District of Columbia Board of Education: Position on the "Weighted Student Formula"
10. Local School Planning Guide - selected pages