

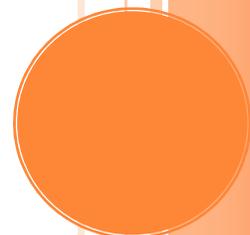
REPORT OF THE NEA UNISERV CORE COMPETENCIES TASK FORCE

January, 2014

In January 2013, an NEA Task Force was convened to draft core competencies for potential and current UniServ directors. These core competencies will serve to guide the development of trainings to advance the skills of potential and current UniServ directors.

Dan Rivera, Manager, NEA UniServ Program

January, 2014



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BACKGROUND

From the inception of the UniServ Program, NEA has maintained a strong commitment to ensure the professional development of UniServ staff. Collectively, the UniServ Program represents one of our biggest investments and subsequently assets that can be leveraged to advance the interests of our members and our students. There are no official competencies required or agreed upon by the NEA and state affiliates for UniServ directors. The current UniServ director job description found in the NEA Board adopted guidelines states,

The official job title of all full-time and part-time UniServ staff members will include the term “UniServ” (e.g., UniServ representative, UniServ director, UniServ specialist). The specific job responsibilities of full-time and part-time UniServ staff members will be set forth in a written job description that is consistent with the UniServ Program Guidelines, and that is developed through a decision making process that is in accord with the legal rights and obligations of the staff members and their organizational representatives, and the employing state affiliates, local affiliates, and local option UniServ councils. (NEA recommends that the written job description of full-time and part-time UniServ staff members who are in UniServ staff positions that are eligible for NEA funding under Section X(A)(1)(a) and Section X(A)(2) include, but not be limited to, the functions set forth in Guidelines Attachment C.)

If we are to emerge from these challenges stronger and better positioned to advance the cause of public education, we must chart a different path...

Historically, the NEA has provided training opportunities to potential and existing staff identified as UniServ directors. These trainings ranged from pre-employment intern programs to national skills sessions designed to develop the necessary competencies to advance the interests of NEA members. Orchestrated attacks on labor unions and a prolonged recession have resulted in unprecedented membership losses throughout NEA affiliates.

If we are to emerge from these challenges stronger and better positioned to advance the cause of public education, we must chart a different path and utilize different strategies to fulfill our

mission “to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.”

In January 2013, an NEA Task Force was convened to draft core competencies for potential and current UniServ directors. These core competencies will serve to guide the development of trainings to advance the skills of potential and current UniServ directors.

The Task Force was composed of representatives from governance and staff (NCSEA, NCUEA, NSO, and NEA). The work of the Task Force was facilitated by Jim Testerman, Senior Director, Center for Organizing.

TASK FORCE CHARGES

- The Task Force will draft core competencies for the position of UniServ director that will guide the development of state based pre-employment training programs.
- The Task Force will inventory best practices regarding training currently being delivered at the local and state level as well as training opportunities that are available outside of the NEA/SEA/LEA family.
- The Task Force will consider but not be limited to addressing introductory and advanced competencies that prepare or develop staff to successfully engage in membership recruitment and retention, campaigns to ensure dues stability (including conversion to EFT), developing local capacity to service member needs, leadership development at the local level, and growth and new market organizing campaigns.
- The Task Force will review and propose innovative ways to deliver trainings in multiple venues and/or formats.
- The Task Force will review the UniServ Guidelines and make a recommendation to the NEA President regarding any changes that would be necessary to align training recommendations with the guidelines.

METHODOLOGY AND FINDINGS

The Task Force began its work by exploring the following questions:

- What are competencies versus what is content?
- What are the competencies around which to build a training curriculum?
- How do we ensure that we are delivering a continuum of professional development to our staff with a diverse level of expertise and experience?
- What is the NEA, state affiliate and local affiliate responsibility, respectively, to provide professional development to UniServ directors?

The Task Force identified four broad themes/strands from which to develop recommendations on core competencies.

1. Organizing Competencies
 - Essential Questions
 - Active Listening
 - Appreciative Inquiry
 - Data Mining and Analysis
 - Power Mapping and Application
 - One-on-One's, etc.
 - Team Building
 - Observation and Analysis
 - Group Dynamics
 - Organization, Design, Structure and Processes to support organizing
 - Foundational skills for membership and political organizing

2. Project Management
 - Project Management strategies including software tools
 - Self-directed learning

3. Interpersonal and/or Negotiating Skills
 - Mediation
 - Facilitation
 - Foundational skills for arbitration

4. Teaching and Learning Issues
 - Advocacy on pedagogical issues
 - Advocacy on local and state education policy issues
 - Advocacy on education accountability issues

UniServ CORE COMPETENCIES

The Task Force sets forth five core competencies and skills sets that a UniServ director should be able to demonstrate when being considered for employment in any state or local affiliate.

There may be other competencies that each state or local affiliate adopts as unique to their affiliate. We refer you to the definition and the use of knowledge, skills, and abilities provided at the end of this document as you consider these competencies. Many of the skill sets are transferable between competencies.

UniServ directors should be able to demonstrate and continue to build proficiency within these competencies during the course of their career. Based on this framework the NEA, state, and local Associations will be able to identify, and develop, if necessary, trainings and experiences that will prepare UniServ directors to establish a culture of organizing.

Preamble:

Whereas today’s public education system faces attacks by some political leaders and corporate donors whose ideology is antithetical to NEA’s mission of great public schools for all students; and

Whereas today’s public employees face threats to their compensation, rights, and voice in the workplace; and

Whereas today’s educators face challenges and opportunities brought by increasing diversity in the classroom, expanded technologies, and the changing nature of time available; and

Whereas the fight for adequately funded education at all levels and for education support programs and services often surpasses the challenges of the classroom itself;

Therefore NEA recognizes the need to fundamentally reorient the work of our essential state field staff—the UniServ director—from one of representative and legal advocate to one of organizer. UniServ staff should have an understanding and appreciation of NEA, state, and local policies and positions on educational issues and education reform to effectively carry out her/his role as an organizer.

NEA, state, and local affiliates shall define the UniServ role as one that embraces advocacy and service as essential components of the Association’s work but also prioritizes the work of organizing in order to develop strong leaders who advocate for themselves, their students, and for public education. The UniServ director recruits and supports members to lead our union and profession through strategic campaigns that address the challenges facing educators and students.

I. Core Competency – Organizing

Skills:

- Ability to apply organizing theories and philosophies in direct service to associations and training local leaders
- Ability to explain the relationship between organizing and power
- Ability to write an Organizing Campaign Plan that demonstrates an understanding of campaign messaging, elements of a successful action, last to first planning, and data analysis
- An understanding of one-on-one conversations

- Ability to identify, recruit, and develop leaders
- An understanding of issue organizing and relational organizing
- An understanding of organizing tools, e.g. power mapping
- Ability to write an agenda and conduct effective meetings which leads to achieving stated outcomes
- Ability to facilitate emotionally charged complex meetings
- Ability to train leaders and members with the necessary skills and tools to recruit and retain members
- Ability to work with leaders to implement an Organizing Campaign Plan
- Ability to demonstrate an understanding of community leaders and/or outside groups or coalitions
- Ability to demonstrate building relationships and organize leaders and/or outside groups or coalitions

II. Core Competency – Advocacy

Skills:

- Ability to demonstrate knowledge of and loyalty and enthusiasm for the mission, vision, and core values of the NEA, state and local affiliates
- Ability to support and defend a cause, particularly in the face of pressure and adversity
- Ability to bargain with others in order to reach a mutually acceptable agreement
- Ability to generate alternatives and select an appropriate solution to a problem
- Ability to think clearly and logically under pressure
- Ability to identify and obtain relevant information about an issue or problem
- Ability to facilitate discussion of issues and mediate issues and problems that arise between individuals or groups
- Ability to use organizing techniques to prepare locals for bargaining issues, policy issues, and legislative issues
- Ability to distinguish between grievances and organizing issues
- Ability to find and close a “deal”

III. Core Competency – Communication

Skills:

- Speaks effectively. Clearly communicates thoughts, ideas, and information in groups, in one-on-one conversations and to the media
- Demonstrates effective use of electronic communications tools
- Uses effective listening skills by demonstrating attention to and conveying understanding of the ideas and opinions of others

- Ability to establish rapport with an audience and to express ideas to them in a clear and concise manner
- Ability to verbally communicate effectively using proper grammar
- Ability to write effectively using proper grammar
- Ability to prepare and make presentations that are informative and persuasive to an audience, both informally and formally, using a variety of media

IV. Core Competency – Project Management

Skills:

- Ability to develop or adopt a system to track tasks and projects
- Ability to develop, manage, and complete projects
- Ability to build and develop a team
- Ability to communicate changes and outcomes of a project
- Ability to facilitate the definition of project scope, goals and deliverables
- Ability to define project tasks and resource requirements
- Ability to develop project plans
- Ability to plan and schedule project timelines
- Ability to use technology to advance the project

V. Core Competency - Educational and Professional Issues

Skills:

- Ability to demonstrate a basic understanding of the patterns, trends and best practices regarding education policy.
- Ability to demonstrate a basic understanding of employee evaluation policies and procedures, including the evaluation appeal process
- Ability to demonstrate a basic understanding of, and advocacy regarding policies and strategies that impact education professions and student learning
- Ability to demonstrate knowledge of statutes/policies covering teaching and learning topics
- Ability to demonstrate adult learning theory—how to work with and train adults
- Ability to demonstrate advocacy for quality professional development

Recommendations

Charge #1: Draft core competencies for the position of UniServ director that will guide the development of state based pre-employment training programs.

This charge has been completed and addressed in the body of this report.

Charge #2: Inventory best practices regarding training currently being delivered at the local and state level as well as training opportunities that are available outside of the NEA/SEA/LEA family.

This charge has been completed and addressed in the addendum to this report.

Charge #3: Consider but not be limited to addressing introductory and advanced competencies that prepare or develop staff to successfully engage in membership recruitment and retention, campaigns to ensure dues stability (including conversion to EFT), developing local capacity to service member needs, leadership development at the local level, and growth and new market organizing campaigns.

This charge has been completed and addressed in the body of this report. The task force believes training in the five core competencies will lead to the requisite skills to address more complex challenges such as dues stability and new market campaigns.

Charge #4: Review and propose innovative ways to deliver trainings in multiple venues and/or formats.

The Task Force discussed training format and delivery and recognizes that there is no one size fits all approach to training. Training that is developed should be more than classroom instruction. It should be experiential with multiple opportunities for field based “hands on” activities and where economically feasible should be offered in multiple geographic locations (east-central-west). As technology permits, a digital training component should be offered but should not be the sole vehicle for delivery.

Charge #5: Review the UniServ Guidelines and make a recommendation to the NEA President regarding any changes that would be necessary to align training recommendations with the guidelines.

No changes to the guidelines are being recommended.

Conclusion

It is understood that the work of the UniServ director varies from state to state and, as such, each state affiliate will continue to hire based on its unique needs. To that end, the recommended competencies are offered as a core framework to states and locals to consider when making hiring and retention decisions and will guide NEA UniServ Training Program.

There remains the need to develop and deliver training based on these competencies. NEA's Center for Organizing will begin to coordinate the development and delivery of trainings that are aligned with these competencies.

Task Force Members

- Bob Anzenc – Executive Director, Teachers Association of Baltimore County, Maryland. NCUEA
- John Avouris – UniServ Director, Ohio Education Association. NSO
- Abby Beytin – Local President, Teachers Association of Baltimore County, Maryland. NCUEA
- Erik Burke – Executive Director, MEA-MFT, Montana. NCSEA
- Brian Dunn – Manager, NEA Campaigns and Elections
- David Duvall – Regional Director, NEA Center for Organizing
- Secky Fascione – Director of Organizing, NEA Center for Organizing
- DeeAnn Flaherty – Executive Director, Jefferson County Education Association, Kentucky. NCUEA
- Gerry Fong – UniServ Manager, California Teachers Association. UMA
- Sharon Gallagher-Fishbaugh – President, Utah Education Association. NCSEA
- Carmen Gonzalez-Gannon – UniServ Manager, New Jersey Education Association. UMA
- Bill Freeman – President, San Diego Education Association. NCUEA
- Betty Jeung – Organizational Specialist, NEA Center for Organizing
- Brent McKim – President, Jefferson County Education Association, Kentucky. NCUEA
- Brenda Pike – Executive Director, Indiana State Teachers Association, Indiana. NCSEA
- Dan Rivera – Manager, NEA UniServ Program, Center for Organizing.
- Tony Salazar – Executive Director, Colorado Education Association, Colorado. NCSEA
- Gera Summerford – President, Tennessee Education Association, Tennessee. NCSEA
- Dale Templeton – UniServ Manager, Maryland State Education Association, Maryland. UMA
- Paul Toner – President, Massachusetts Teacher Association, Massachusetts. NCSEA

Staff Supporting Task Force

- Jim Testerman, Senior Director, NEA Center for Organizing
- Debra Abraham, Senior Program Assistant, NEA Center for Organizing

Reference

- **Ability:** competence in an activity or occupation because of one's skill, training, or other qualification: the ability to sing well.ⁱ
- **Competency:** is the capability to apply or use a set of related knowledge, skills, and abilities required to successfully perform critical work functions or tasks in a defined work setting. Not to be confused with **competence**, a competency describes a behavior, but does not attempt to describe a level of performance.

Competencies often serve as the basis for skill standards that specify the *level* of knowledge, skills, and abilities required for success in the workplace, as well as potential measurement criteria for assessing competency attainment.”ⁱⁱ

- **Content:** all that is contained or dealt with in a discussion, piece of writing, etc; substance.ⁱⁱⁱ
- **Knowledge:** familiarity or conversance, as with a particular subject or branch of learning: A knowledge of accounting was necessary for the job.^{iv}
- **Skills:** the ability, coming from one's knowledge, practice, aptitude, etc., to do something well: Carpentry was one of his many skills.^v

Addendum A

Charge #2: Inventory best practices regarding training currently being delivered at the local and state level as well as training opportunities that are available outside of the NEA/SEA/LEA family.

Arizona

- Wellstone
- Industrial Areas Foundation

California

CTA offers a number of multi-day trainings throughout the year for our UniServ staff which are developed with the staff bargaining unit through a Joint Training Committee. CTA also has single-day trainings on critical issues, including some tied to specific regions of the state, and our ISSD department provides various computer-skills workshops throughout the year.

- Labor Law
- School Finance
- Organizing for Power
- Basic Aid (District Budget issues)
- Conflict Management
- Field Strategies (current issues/topics)
- Access 2010 Essentials
- Outlook Supplemental
- Digital Toolbox

CTA has also scheduled a mandatory 2-day staff training September 2013 for all UniServ staff to go over their roles in assisting chapters with bargaining and organizing issues related to Common Core, Local Control Funding Formula and Teacher Evaluation.

Delaware

- 2012-13 provided Dynamic Trainer training by Kagan Training.
- American Arbitration Association or similar organizations is offered on a case by case basis.

Illinois

Professional development opportunities:

- Fall and Spring Professional Staff Meetings
- Legal Update
- PERA Roundtables
- ACA Webinars

Trainings offered in 2012-13:

- Settlements (presented by Legal), Level 100
- WEBINAR: Court and Administrative Law System
- Using Office 2010, Level 100
- Arbitration Preparation (for UDs hired in last 3 years), (This is not available to interns)
- Salary Schedule and Theory, Level 100
- Salary Schedule and Theory, Level 100
- IBB Training (for UDs hired in last 3 years)
- Organizing to Bargain, Level 100

- Finance Training, Level 100
- Mini Legal Update for Associate Staff, Level 200
- Organizing Around RIF, Recall, Transfer and Reassignment, Level 100
- My Locals Need PR Help ASAP!!, Level 100
- My Locals Need PR Help ASAP!!, Level 100
- Organizing Around Local's Goals Level 100
- Words Matter (presented by Legal), Level 100
- Using MOSS, level 200

Indiana

- Compensation (mostly regarding the new models for our new collective bargaining laws)
- Legal (ISTA counsel training on current legal issues in state)
- Bargaining (how to under new legislation, etc)
- Insurance/Benefits (how to comply with new state and federal laws)
- Social Media (how to use effectively as a staff member)

Iowa

- Research Training-how to use internal databases
- Public Narrative Training through NOI (NEA supported)
- Mediation for Better Schools (NEA supported)
- Dealing with Disability and Workers Comp Issues
- Staff Reductions
- Beginning and Advanced Excel
- PowerPoint
- Using Adobe Connect for Webinars and Meetings

Kentucky

- Provide on-going staff development training at the four staff meetings held each year
- Most current training focused on membership recruiting and retention.
 - Topics included; data analysis, targeting and effective site visits, Association Representative training, lessons from community projects, and short term organizing projects.

Louisiana

- Organizing around RIF, Contracts and VAM
- Bullying
- Training ARs
- Legislative Contact Team Trainings
- Bargaining for Locals
- Legal Updates
- Grievance Processing
- Problem Solving

Maine

Monthly all-day staff meeting:

- Health Insurance – including information on how rates are established and affected; alternative plans structures such as Health Reimbursement Arrangements and Health Savings Accounts; insurance terminology such as co-pay, co-insurance, deductibles, and related terms; general information about ACA, and other related insurance issues.
- Organizing – One-on-Ones, power analysis, community engagement and analysis.
- Educator Evaluation – Reflective practice evaluation systems such as NBCT, Danielson, and Marzano, use of test scores, and other related issues.
- Generational Issues

Michigan

- CORE I – Introduction to MEA
- CORE II – Legal
- CORE III – Bargaining
- CORE IV – Higher ED & ESP
- CORE V – Facilitation and Consultation
- CORE VI – Phase I & II – Advocacy
- CORE VII – Arbitration

- School Law & Collective Bargaining
- Legal Update
- Dancing with the Numbers
- Financial Analysis
- Fact Finding
- True Colors

Nebraska

- Staff trainings offered in conjunction with Kansas and Iowa on an as needed basis rather than a regular schedule.
- Past trainings in the last couple of years include mediation and arbitration 1 and 2.
- Interest Based Bargaining training using resources and personnel from the University of Nebraska.
- Software specific training on our Navigator program which is software for completing comparability studies as outlined in Nebraska Statutes and Case Law.

Nevada

- Statewide UniServ Training on preparing for arbitrations - state specific.

New Jersey

- Trainings with newest UD: “Conversations with Veteran Reps.” Meet once a month.
- Following is the list of topics discussed with new reps:
 - Bargaining Health Benefits
 - Collective Bargaining
 - Community Organizing
 - Contract Enforcement
 - Deconstructing a School Budget

- Effective Communications with Members and Leaders
 - ESP Issues
 - Forging Strong Interoffice Relationships
 - Grievance Arbitration (we recently added a session on writing briefs)
 - Health and Safety Issues
 - Making the Computer Work For You
 - Organizational Development
 - PERC & 18A
 - Political Action and UniServ
 - Professional Development & Advocacy
 - Salary Guides in Theory & Practice
 - Selected Legal Issues
 - Tools for Effective Problem Solving
 - UniServ Advocacy Training Program
 - Vouchers: How to Repel the Threat.
- Trainings for veteran UD's: Yearly offer training to all our field reps on issues that crop up during the year. . . like passage of new tenure law, a bill that requires employees to pay a portion of their health insurance premium or how Obama Care will impact bargaining, etc.

NYSUT (New York)

Fall 2013 (2013-14 to be developed)

- New LRS Orientation Seminar
- Excel for LRS
- Salary Schedules
- Local Finance/Member Policy and Procedures
- Collective Bargaining
- Bargaining Health Insurance/Update on ACA
- Bargaining for Constituency Groups
- Education Law/APPR Appeals Process

South Carolina

- Intake
- Phone Call – Role Play
- Returning Calls
- Active Listening
- Member Meetings
- Challenges
- Record-Keeping
- Realistic Expectations
- Follow up
- Resources & Links
- Legal services
- Professional Balance
- Staff Networking

- Advice for new UDs
- Advice to Members
- Advocacy for Members
- Political Action

Utah – Teachers

- Have conducted Bargaining Training – UDs participated as trainers and participants.
- Plan to develop a training session on FERPA and HIPPA - 2013-14.

Virginia

- “You mean this could really happen to me!” From Resignation to Resilience
- Equal Employment Opportunity Commission Training
- Organizing

ⁱ <http://dictionary.reference.com>

ⁱⁱ *Personnel Decisions Research Institutes, Inc. (PDRI) 2005, updated by JBS International, Inc., Aguirre Division in 2012.*

ⁱⁱⁱ World English Dictionary

^{iv} <http://dictionary.reference.com>

^v <http://dictionary.reference.com>