



A Union of Professionals
AFT-Oregon
AFL-CIO



Building Sustainable Power

A Strategic Plan for AFT-Oregon

2016-2020



- Multi-Year Contracts Noisy
stopped by some members.
- Pay issues
- Defined expectations of what
PT should be doing to be
successful

Building Sustainable Power: AFT-Oregon's Strategic Plan, 2016-2020

1. Introduction

“A plan to help AFT-Oregon grow, build political power, act as a progressive voice within the labor movement and the community, and successfully advocate for its members.”

“A stronger union with real teeth and no fear of biting the hand that tries to slap unions down.”

AFT-Oregon Convention Strategic Planning Focus Groups, April 2015

The American Federation of Teachers–Oregon represents approximately 14,000 workers, most of whom are employed in public and private educational institutions, including K-12 schools, colleges, and universities.

Throughout its proud 64 year history, AFT-Oregon has served as an effective advocate for the interests of education professionals by providing coordinated advice, resources, and education to affiliated local unions. Although AFT-Oregon members work in a wide variety of settings, they are united in the belief that a vibrant democracy depends on access to affordable quality education and fair treatment for workers. Our mission statement underscores these core beliefs, pledging to “improve the quality of people’s working and personal lives through commitments to quality education, social justice and a powerful progressive labor movement.”

Although AFT-Oregon has compiled an admirable record in representing its members’ interests, providing effective training and leadership development opportunities, expanding its ranks through organizing, and advocating for educational quality and access, it faces multiple challenges that its leaders and members have candidly acknowledged. Internally, the state organization has experienced major changes in leadership and will soon face the retirements of veteran local leaders who have played an integral role in building the union. Externally, continuing disinvestment in education, political attacks on public institutions and public employees, and the growing corporatization and privatization of education policy threaten to erode the many gains AFT-Oregon has made for its members and the constituencies they serve. The potential loss of fair share in the public sector and pending anti-union ballot measures at the state level underscore the gravity of these challenges and the volatile environment in which the union is operating.

The convergence of these circumstances prompted AFT-Oregon to launch a comprehensive strategic planning process in the fall of 2014. By undertaking an extensive review of its operations, the union aimed to assess its strengths and weaknesses, understand the challenges it faces, and create an action plan to enhance AFT-Oregon’s effectiveness and strength. Working with facilitators Raahi Reddy and Bob Bussel from the University of Oregon’s Labor Education and Research Center (LERC), AFT-Oregon’s “Design Team” developed a strategic planning process that solicited broad input within AFT-Oregon and from external stakeholders. The process culminated with the identification of six “Strategic Focus Areas” that will guide AFT-

Oregon's activities over the next five years. Design Team members, who devoted time at different phases of the planning process, included:

- **Shannon Brett: Director of Political and Legislative Affairs**
- **Kristen Fitzpatrick: Administrative Program Coordinator**
- **Devin Hunter: Secretary and AFT Local 4671**
- **Janella James: Executive Director**
- **Debra Mayo-Kelley: Field Representative, United Employees Guild President**
- **Steve McAllister: Treasurer and AFT Local 3544**
- **David Rives: President**
- **Jaime Rodriguez: Vice President of Political Action and AFT Local 2277**

We are also grateful to AFT-Oregon staff members Deirdre Mackey, Leah Leach, and Sarah Sevey for their assistance throughout the strategic planning process.

The overarching theme of the strategic plan, "Building Sustainable Power," reflects AFT-Oregon's determination, in the words of one member-leader, "to create an action plan to operationalize our ideals and goals." Although we do not underestimate the serious challenges that lie ahead, we offer this strategic plan as an expression of confidence in our ability to shape the future in a positive direction.

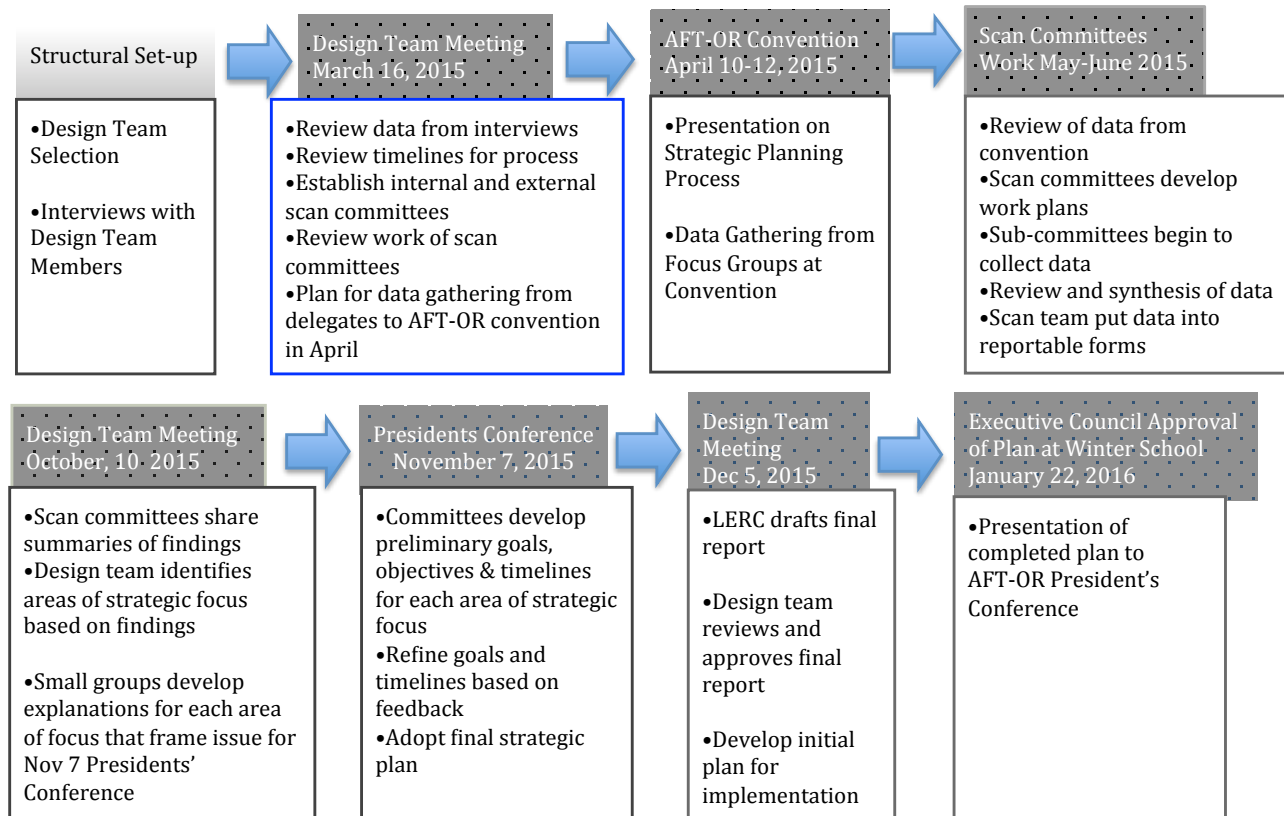
2. The Strategic Planning Process: A Chronology

"To have it result in a clear, workable plan, finished efficiently in a timely manner."

AFT-Oregon Convention Strategic Planning Focus Groups, April 2015

The strategic planning process has evolved over a 14 month period. The graphic shown below provides a chronology of the extensive data gathering, outreach, and analysis that has occurred during the process.

Overview of AFT-OR Strategic Planning Process Timeline



The strategic planning Design Team has been committed to hearing from as many voices as possible and created multiple opportunities during the planning process to gain feedback and insight from AFT-Oregon leaders and members as well as from external constituencies.

3. What We Have Learned: The Results of the Internal and External Scans

“I would like to see AFT focus more on how to reach individual members. Our members aren’t going to participate if they don’t feel heard or represented.”

AFT-Oregon Convention Strategic Planning Focus Groups, April 2015

An integral part of AFT-Oregon’s strategic planning process has been the work of the internal and external scan committees. Over a year-long period, these committees conducted extensive research to assess the internal and external environments in which AFT-Oregon operates. The findings of the scan committees have provided valuable insights and the basis for

thoughtful analysis that guided the Design Committee in helping AFT-Oregon choose its strategic priorities for the next five years.

The Internal Scan Committee examined how AFT-Oregon leaders and members feel about their union and the challenges it faces. The Internal Scan Committee's report reflects data generated from focus groups at the April AFT-Oregon convention, interviews with AFT-Oregon executive council members, and an online survey of AFT-Oregon members. 395 persons responded to the online survey.

The External Scan Committee reviewed AFT-Oregon's relationships with outside allies and other organizations that share the union's interests in education policy. The External Scan Committee conducted individual interviews with unions, decision-makers, and stakeholders within the field of education policy, and also spoke with key stakeholders outside the educational field.

Each Scan Committee presented its findings to the entire Design Team on October 10, 2015. The major findings of the Scan Committees are summarized below:

Internal Scan Committee Report

- Many members don't know or understand the purpose of AFT-Oregon.
- The union needs to think about how it can communicate more effectively with classified workers.
- Servicing has been AFT-Oregon's focus but organizing has also assumed greater importance.
- We found less member interest in politics than anticipated and learned that members are less educated about politics than we had imagined.
- There was an overall favorable impression of AFT-Oregon from members who completed surveys.
- Members have awareness of and a connection to AFT-Oregon even if they do not fully understand its purpose or structure.
- We wonder if the current model of how we do our work remains relevant.
- We see the need for greater coordination of effort and activity among AFT-Oregon local unions.

External Scan Committee Report

- External groups have mostly worked with AFT-Oregon staff and are just now beginning to work with local leaders and members.
- We need to define AFT-Oregon's goals more clearly and how we work with other partners.
- Our external work is disconnected from our members.
- We need to build on existing relationships with allies and start new ones.
- AFT-Oregon needs to build a statewide organizational presence to lobby for changes in educational policy.

Overall Challenges AFT-Oregon Is Facing

After reviewing the data they had collected, members of the scan committees identified eight overall challenges that AFT-Oregon is facing:

- Dealing with the *Friedrichs v. CTA* case and its implications.
- Communicating, defining, and understanding AFT-Oregon's purpose.
- Understanding the organizing and servicing models and determining where AFT-Oregon fits on this spectrum.
- Creating greater transparency in the union's communications and interactions with members.
- Finding additional creative ways to engage members and help them see urgency of the challenges AFT-Oregon is facing.
- Generating a broader sense of member involvement and engagement with the union.
- Assessing the effectiveness of the current model of how AFT-Oregon does its work.
- Fostering greater coordination of effort and activity among locals.

4. Areas of Strategic Focus: AFT-Oregon's Action Plan to Build Sustainable Power

“Don't just fight back, fight forward”

AFT-Oregon Convention Strategic Planning Focus Groups, April 2015

After a full discussion of the meaning and implications of the Scan Committees' findings and the overall challenges faced by AFT-Oregon, the Design Team identified six “Areas of Strategic Focus” to guide the union's activities over the next five years. At the local presidents' conference on November 7, 2015, delegates developed lists of goals and tasks needed to help achieve the broad goal contained in each Area of Strategic Focus. Following this meeting, the Design Team reviewed the delegates' work on the strategic plan, fine-tuned their contributions, and assigned specific timelines and persons responsible for ensuring completion of each goal and task.

It is important to emphasize that this is a five-year plan. Some Areas of Focus reflect a greater degree of urgency and will receive immediate attention. Other areas have a more extended timeline for completion. These decisions reflect a conscious awareness of which issues demand priority in terms of time, energy, and resources.

Taken as a whole, the six Areas of Strategic Focus position AFT-Oregon to deepen relationships with our members, embrace an organizing approach in our work, communicate our message more effectively, and exercise greater influence over the formulation of education policy in Oregon.

Focus Area #1 (Internal)

Developing a Communications Strategy That Explains Who AFT-Oregon Is, What We Do, & Why Members Should Be Involved

Goal 1 – Educate stewards and develop an internal campaign we can implement.

OBJECTIVES:	COMPLETED BY:	ASSIGNED TO:
• Ask locals what they want and what would be helpful	<i>March-April 2016</i>	Field Staff
• Create a customizable model shop steward handbook (description of what AFT-Oregon is, why AFT exists, its mission)	<i>April 2016</i>	Field Staff
• AFT-Oregon session training on internal campaigns	<i>Winter 2016</i>	Field Staff
• Encourage formation of stewards council	<i>End of 2017</i>	Field Staff

Goal 2 – AFT-OREGON to develop a variety of customizable and accessible tools (multi-media, webinars, etc.) and provide needed trainings (after assessing which are working now).

• Temporary membership database	<i>April 2016</i>	Communications
• Permanent membership database	<i>Dec 2016</i>	AFT
• Online accessible training (video, written, closed captions, screenshots)	<i>Fall 2018</i>	Communications
• Affordable webinar software (for advanced skills training sessions)	<i>2016-2017</i>	Communications
• Brief video explaining who/what/why AFT-Oregon is and its mission	<i>Fall 2018</i>	Communications

Goal 3 – Develop methods and materials for outreach to new members.

• Develop new member orientation packet	<i>Fall 2016</i>	Field Staff and Communications
• Develop program for new member orientation	<i>Winter 2017</i>	Field Staff and Communications

Goal 4 – Develop a clear and consistent message for use with members.

• Launch “I Am AFT”	<i>June 2016</i>	Field Staff and Communications
• Assess brand/logo	<i>June 2016</i>	Communications

Focus Area #2 (Internal)
**Strengthening Connection, Coordination, and Solidarity
Among AFT-Oregon Locals**

Goal 1 – Regionalize opportunities/education activities to build more relationships between leaders with similar roles.

OBJECTIVES:	COMPLETED BY:	ASSIGNED TO:
• Conduct bargaining conference/resource sharing/research sharing	<i>Fall 2016</i>	Field Staff
• Include family activities during events	<i>Ongoing</i>	Field Staff
• Create regional list serve	<i>Fall 2016</i>	Communications

Goal 2 – Use gatherings to share best practices and experiences among locals.

• Central repository for internal sharing in Google Docs.	<i>February 2017</i>	Communications
• Shared calendar	<i>February 2016</i>	Communications
• Victory sharing and social mingling	<i>February 2016</i>	Communications

Goal 3 – Use electronic communications to raise awareness of each other and build learning and solidarity.

• Improve audio/visual tools such as YouTube, Go to Meeting	<i>Winter School 2017</i>	Communications
• Upgrade AFT-Oregon website	<i>February 2017</i>	Communications

Goal 4 – Share resources and expertise among locals to build diversity.

• Plan regional training	<i>Fall 2016</i>	Executive Director
• Create and maintain centralized history of AFT and its locals	<i>Winter 2017</i>	Communications

Goal 5 – Planning and coordination done over long range to plan opportunities to work together.

• Collaborate in social, community, and unit activities	<i>Fall 2016</i>	Field Staff
• Identify community issues within each region for locals to work on together	<i>December 2017</i>	Field Staff

Focus Area #3 (Internal)
Sustainable Power: Preparing for Anti-Worker Attacks
(e.g., *Friedrichs v. CTA* and Beyond)

Goal 1 – Educate members on what union culture means and on the nature of attacks on union culture.

OBJECTIVES:	COMPLETED BY:	ASSIGNED TO:
• Consolidate standard messaging	<i>February 2016</i>	Organizing
• Create tool kit with F & Q's for different conversations	<i>Ongoing</i>	Organizing
• Develop trainings	<i>Winter School 2016</i>	Organizing
• Conduct blitzes	<i>Ongoing</i>	Organizing
• Activate members	<i>Ongoing</i>	Organizing
• Create goals on conversations with accountability structure	<i>Ongoing</i>	Organizing
• 60% of all members covered by local organizational plans (1.0)	<i>April 2016</i>	Organizing
• Remaining 40% covered by local organizational plans (2.0)	<i>February 2017</i>	Organizing
• All locals develop organizing plans that include social point persons, social activities, "fun stuff"	<i>December 2017</i>	Organizing

Goal 2 – Strengthen contracts around organizing.

• Create toolkits with suggested bargaining language	<i>January 2018</i>	Field Staff
• Develop post- <i>Friedrichs v. CTA</i> bargaining strategy training	<i>January 2018</i>	Field Staff

Goal 3 – Evaluating and utilizing current resource to foster resiliency.

• Create a budget for each option by April (as is, lose opt out, lose fair share, lose fair share & 30% of membership)	<i>April 2016</i>	Treasurer
• Save capital to support organizing and staff	<i>April 2016</i>	Treasurer
• Evaluate crucial capital for each budget	<i>April 2016</i>	Treasurer
• Establishing membership rates to support staff, services, capital, and organization. Help locals push toward it.	<i>April 2016</i>	Executive Director

Goal 4 – Union Goals: "I Am AFT Campaign"

• Distribute AFT History Books	<i>April 2016</i>	Pres. & Communications
• Annual update of AFT-Oregon achievements (local & state)	<i>June 2016</i>	President
• AFT-Oregon hosts quarterly social events at locals	<i>Ongoing</i>	Pres. & Communications
• Database of resources	<i>June 2016</i>	Pres. & Communications

Focus Area #4 (Internal)

Increasing and Deepening Member Engagement

Goal 1 – Create and maintain a sustainable education and mentorship program.

OBJECTIVES:

	COMPLETED BY:	ASSIGNED TO:
• AFT-Oregon creates curriculum for use by locals to train members	<i>December 2018</i>	Executive Director
• Create local Exec Council training program	<i>December 2018</i>	Executive Director
• AFT-Oregon Exec Board will create training & education committee	<i>December 2018</i>	Ad hoc committee
• Local AFT officers will mentor & train their successors	<i>December 2018</i>	Executive Director
• Members mentor new employees	<i>December 2018</i>	All Locals
• Provide trainings for members	<i>December 2018</i>	Executive Director

Goal 2 – Each AFT-Oregon local creates an organizing program that includes regular one-on-one organizing conversations.

• Identify members who will be willing/able to be a steward/worksite leader	<i>Ongoing</i>	Organizing & Field Staff
• Meet with stewards/WSL to share information, strategize and plan on a regular basis	<i>Ongoing</i>	Organizing & Field Staff
• Provide training if necessary	<i>Ongoing</i>	Organizing & Field Staff

Goal 3 – Each local creates a fun program that includes social and community events that inspire and create hope.

• ID community/social point person (part of local strategic plan)	<i>February 2018</i>	Local Union
• Recruit social event planners (part of local strategic plan)	<i>February 2018</i>	Local Union
• Allocate funds for these events	<i>February 2018</i>	Local Union
• Survey membership to ID popular event types/times	<i>February 2018</i>	Local Union
• Develop communication plan to get the word out about social events (email list, office visits, calendar)	<i>February 2018</i>	Field Staff & Comm.
• Debrief events and tweak for greater success/ more fun	<i>February 2018</i>	Field Staff & Comm.
• Collaborate with similar/nearby locals for joint events	<i>Ongoing</i>	Local Presidents

Goal 4 – Locals will have a functional and active executive board

• Fill all open positions with active recruitment, then training and membership for office	<i>February 2017</i>	Local Unions
• Open Communication & Parliamentary Procedure training	<i>Winter 2017</i>	Executive Director
• Team building activities and retreats	<i>Ongoing</i>	Local Unions
• Cross training between offices	<i>Winter 2017</i>	Executive Director
• Make participation fun	<i>Ongoing</i>	Everyone

Focus Area #5 (External)

Becoming More Engaged with Key Partners and Allies

Goal 1 – Create intentional communications with partners and allies that focus on overlapping values.

OBJECTIVES:	COMPLETED BY:	ASSIGNED TO:
• Identify and map database of allies and affiliates	<i>Fall 2016</i>	President
• Appoint member ambassadors to personally represent AFT to allied organizations	<i>Ongoing</i>	President, Exec. Council
• Develop a clear and consistent message for external outreach	<i>Dec 2017</i>	Communications

Goal 2 – Facilitate and share the planning and provocative participation in organizing with allies.

• Create calendar of events and publicize	<i>Dec 2017</i>	Communications
• Solicit partner engagement in beginning and planning events	<i>Dec 2017</i>	President
• Conduct one shared event with each AFT affiliate in Oregon within next two years (e.g., OFNHP, ONA, OSEA)	<i>Dec 2017</i>	President

Goal 3 - Promote greater member involvement in building relationships with allies and community organizations.

• Survey local membership on current organizational involvement and interests	<i>June 2017</i>	Political
• Survey local leadership on current involvement in their community activities	<i>June 2017</i>	Political
• Power mapping	<i>Dec 2017</i>	Political
• Conduct focus groups with members from each local in Oregon	<i>Dec 2017</i>	Political

Goal 4 – Promote and train AFT-Oregon members to become leaders in community and allied organizations.

• Identify and recruit potential leaders	<i>Ongoing</i>	Executive Council
• Create a calendar of events of allied organizations	<i>Winter 2018</i>	Communications
• Create a training model	<i>Winter 2018</i>	Executive Director
• Make members aware of existing community and allied organizations	<i>Ongoing</i>	Communications

Focus Area #6 (External)

Becoming a Leader on Education Policy in Oregon

Goal 1 – AFT-Oregon will build research capacity.

OBJECTIVES:	COMPLETED BY:	ASSIGNED TO:
• Understand AFT's current capacity	<i>End of 2018</i>	Political
• Share resources within AFT-Oregon	<i>End of 2018</i>	Political
• Partner with current researchers and other groups	<i>End of 2018</i>	Political
• Use member research capacity	<i>End of 2018</i>	Political
• Share resources with other groups	<i>End of 2018</i>	Executive Council

Goal 2 – AFT-Oregon will know and grow our influential connections.

• Networking with other organizations	<i>Ongoing</i>	Political & Exec Council
• Relationship building with legislators	<i>Ongoing</i>	Political & Exec Council
• Political power mapping: boards, legislators, agencies	<i>End of 2018</i>	Political

Goal 3 – AFT-Oregon will build and sustain a core of member activists.

• Political communications program	<i>End of 2018</i>	Political
• Changing the public conversation around education	<i>Ongoing</i>	Political & Exec Council
• Encourage & recruit members to run for public office	<i>Ongoing</i>	Political & Exec Council
• Establish political committees in locals	<i>Ongoing</i>	Political, Local Unions

5. Conclusion

“I’d like to see a plan become more than a plan, a strategic plan that really works, that lives and doesn’t die on a shelf.”

–AFT-Oregon Convention Strategic Planning Focus Groups, April 2015

This strategic plan will guide AFT-Oregon’s activities over the next five years and will be subject to periodic evaluation by the AFT Executive Council. In 2018, we will conduct a major review of the plan and share the results with AFT-Oregon members.

Successful strategic plans require three major elements: careful analysis and critical review of an organization’s internal and external environments, alignment of strategic goals with organizational capacity, and a clear strategy for implementation.

AFT-Oregon has met the first two requirements in our planning process. However, if we are to achieve measurable success in implementing our goals, we must incorporate the strategic plan into our daily practice, develop specific procedures to monitor and evaluate our work, make appropriate adjustments when necessary, and hold ourselves accountable for following through on our commitments.

We now have a set of goals and action plans to guide AFT-Oregon’s strategic direction for the next five years. Our goals are ambitious yet reasonable. They build on our strengths, address the major challenges we face, and place member activation and involvement at the center of everything we do. They will enable us to build the sustainable power necessary to meet AFT-Oregon’s obligations to its members and to the broader public we are proud to serve.

Adopted by:

AFT-Oregon Executive Council

David Rives, President, Local 2277 PCCFFAP

Belinda Reagan, Executive Vice President, Local 111 PFSP

Devin Hunter, Secretary, Local 4671 HCU

Jeff Grider, Treasurer, Local 3922 PCCFCE

Jaime Rodriguez, Vice President of Political Action, Local 2277 PCCFFAP

Vice Presidents

Brianna Bertoglio, Local 3544 GTFF

Shaun Cain, Local 6200 AAP

Michele Catena, Local 111 PFSP

Kelly Cowan, Local 3571 PSUFA

Michael Drieling, Local 3209 UAEO

Bernadette Kapocias, Local 3190 SWOCCFT

Joe Lowndes, Local 3209 UAEO

Kris Osterloh, Local 6069 CGE

Mary Sykora, Local 3571 PSUFA

Liaisons

Louise Currin, Local 8035R Retirees

Tim Stoelb, President Local 6732 OSEA

Dawnette McCloud, President Local 5017 OFNHP

Katy Cooper, President Local 5905 ONA

Appendix: Summary of Focus Group Feedback at AFT-OR Convention (April 2015)

“**Bold**” distinguishes statements that received the most support.

1. What do you think is the core-most important function of AFT-Oregon?

Recurring words: “support,” “advocate,” “defend,” “organize,” “coordinate,” “voice,” “build,” “protect,” “empower,” “represent,” “power”

- **Support for locals in bargaining, grievances, setting and achieving goals**
- **Improve working conditions**
- **Coordinate legislative and political activity, lobbying and political advocacy**
- Fight for workers’ rights and change that benefits all workers
- Promote unity among locals and coordinate their activities
- Support for organizing, both external and internal
- Defend and protect education as a right for all people

2. Name three things that you think AFT-Oregon does very well.

- **Political education and legislative action, lobbying, advocacy**
- **Training and education for member-leaders**
- **Support for local unions (includes quality of assistance from field reps., strike support)**
- Organizing and supporting new locals
- Keeping members informed
- Organizing conventions and coordinating events
- Standing up for education and adequate funding for education

3. What do you think are the three top challenges facing AFT-Oregon as you look toward the future?

- **Right-to-work, loss of fair share, political attacks**
- **Regressive per capita structure/ transparency on per capita payments and finances, progressive dues structure**
- **Lack of member involvement, apathy, disengagement**
- **Disinvestment in education, privatization, and corporatization of public education**
- Misinformation and disinformation about unions, public perception and image of unions
- Generational and demographic divides in union and communication between different sectors of AFT-Oregon membership (e.g., higher education and child care)
- Commitment to organizing (faculty, child care, P/T, adjuncts) and be an “organizing union”
- K-12 teachers losing power
- Tuition costs, fee reform, student debt
- Service to organizing transition
- Completion rates
- Pay equality
- Relations with other unions
- Coalition building and achieving greater solidarity
- Perception that union is a “third party”
- Support for locals
- Attacks on PERS

4. What are the issues in education that you care most about? How should AFT-Oregon work to address these issues?

- **Affordable, accessible education for all (student debt, lower or free tuition, equity and inclusion) including preschool**
- **Stable, equal, and sufficient funding for education (need to generate more revenue for education)**
- **Fair and reasonable pay, job security, benefits**
- Shift public perception on teaching and education
- De-emphasize or discard standardized testing
- Shared governance in higher education
- Reduce class size and teacher to student ratios

**5. What are your expectations for the strategic planning process?
What outcomes would you like to see as a result of the process?**

- **Clear, concrete, cohesive, achievable goals, measurable outcomes, clear timelines, and strategies to achieve them (action plan)**
- **Less regressive per capita structure**
- **Serious preparation to fight right-to-work**
- **Move toward an organizing model and a more member-driven union**
- Expand equity and inclusion
- More opportunities for member involvement, input, and participation
- More transparency