

# AFT-OREGON

## 2004-2011

AFT-OREGON  
 - NATIONAL VISIBILITY  
 - AFT-O STAFF  
 - GOEA  
 - POLITICAL FUNDING  
 - IMPROVED UNIONS  
 - ACCOUNTING FOR MEMBERS  
 - INCREASED POLITICAL ACTION BASE

### Political Agenda

- prepare & elect
- Member involvement
- ELECTION success based ON strategies = Communicate
- NEW ALLIANCE - AFL-CIO = 3 seats

MAXIMIZE AFT-O STAFF & their work

### ORGANIZING

- French school
- Charter Schools
- Montessori
- CGE
- Retirees Chapter
- focus ON ORGANIZING - OUS

### PLAN Committee

- Participation w/ OSEA

Post-Secondary Quality Ed.

- EOU
- BROKE perception of .5
- FAIR SHARE
- INTERNAL organizing

### Coalitions for Defend OREGON

OEACONVENTIONAL Report/Acceptance

### BRANDING/Identity w/ LOCALS

- AFT-OREGON
- WORKER FREEDOM ACT

### Identified AS Successful PLAYERS / LEADERS

### Communications

- CIVIL Council
- RECRUIT people focused on state

POSTAL Alerts & training  
 CROSS reference address website

- digital COMM.
- websites
- email
- MAGAZINE format
- ONLINE COMMUNICATIONS
- LEADER NET
- member highlights

### Education

- professional development for LOCALS = CAPACITY
- Double Ballot

### BOARD Development

- Improved SKILLS
- ENHANCE E-COMMUNICATION
- INCLUSIVE ON Council
- AFT-O branched out TO support & include non-organized workers

### Bullet proof legislature Maintain governors

Comfort with our Power - ownership in our ROLES

### Size More Exposed EC is much more focused with broader representation

- Collegiality in our interaction
- Common MISSION

### STAFF Services Awareness TO LOCALS

- LEGAL
- PROFESSIONAL

Members to STATE Board

CREATION OEB CARD check

# DEFINING OUR FUTURE

## Toward a Strategic Vision 2011 - 2020

**Cover Photo:** AFT-Oregon accomplishments under the Strategic Objectives from the 2004 Strategic Vision. Those were written on a flip chart by the Executive Council participants for the strategic planning that resulted in this report.



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# AFT-Oregon Mission

AFT-Oregon, a labor organization composed of autonomous locals with shared interests, will:

- Provide coordinated advice, resources and education to affiliated locals;
- Be a strong unified voice in the labor movement, civic affairs and political action;
- Continue to bring new members into the labor movement,

in order to improve the quality of people's working and personal lives through commitments to quality education, social justice and a powerful progressive labor movement.

## SUMMARY

“Toward a Strategic Vision II” has been the guiding framework for AFT-Oregon direction since concurrence by the 2004 Convention.

It has served the organization well in the focus of its resources and energy. But the cycle of change continues, events move more rapidly, technologies improve and grow, Oregon politics ebb and flow, funding for public institutions shrinks, organizational needs shift and member interests evolve.

The AFT-Oregon Executive Council saw an opportunity in the current changes in the state and country to revisit our strategic objectives and chart a course for the next decade.

The Executive Council, utilizing a neutral facilitator, convened February 12 and 13, 2011 to revisit the current strategic objectives, evaluate their continuing application, adjust the organization’s sights on a new, future horizon, and develop a new look ahead. Doing this required an altered approach, identifying “strategic intent” – focusing on a description of success – rather than a specific list of enumerated goals. This set the tone and framework for an examination of conditions around the union and its members, including *trends* that move and develop the culture regardless of our influence; *forces* that propel, resist or deflect trends and our direction; and *opportunities* to build on our strengths or solve issues that impact the union

This examination included review of the Mission Statement. The Executive Council found it still to be applicable so it was not modified.

This report captures the work of the Executive Council in the “description of success” for AFT-Oregon through the year 2020. It includes summaries of the trends, forces and opportunities identified by the Council; the Strategic Intent through 2020; and finally, the Strategic Focus for the next five years for each of the long-term descriptions.

David Rives, President  
Mark Schwebke, Executive Vice-President  
Rodger Gamblin, Secretary  
Ruth Kosto, Treasurer  
Louise Currin, VP Political Action  
Sam Bernofsky, Vice President  
Angela Brandt, Vice-President  
Kelly Cowan, Vice-President  
Ed Degrauw, Vice-President  
Deborah Hall, Vice-President

Bernadette Kapocias, Vice-President  
Emily Plec, Vice-President  
Belinda Reagan, Vice-President  
B.J. Walker, Vice-President  
Joel Yoder, Vice-President  
Val Jack, Liaison, 8035R  
Linda Rohman, Liaison, 5017  
Bonnie Luisi, Liaison, 6732  
Richard Schwarz, Executive Director

# Strategic Planning

## Definition, New Approach

### *Strategic Planning Defined*

Strategic planning is a formal process for evaluating an organization's external environment, internal resources, leadership, and institutional and political priorities in order to create core strategies and plans to achieve a result.

### *New Approach: Strategic Intent*

Based on the trends and forces, strengths and opportunities of AFT-Oregon and the 2004 "Toward a Strategic Vision II" strategies, the new approach defines the long-term outcomes of AFT-Oregon in 2020. "Strategic Intent:"

- captures the **essence** of "being the best." The focus is a description of success.
- is **stable** over time, providing direction for short term action while leaving room for reinterpretation as new opportunities arise.
- sets a **target** that deserves personal effort and **commitment**. It is clear about the ends, and is flexible about the means with room for improvisation and creativity throughout the organization.

The lists following under *Trends and Forces*, and *Opportunities* are not identified in any priority order and should not be read or considered in order or priority.

# Trends and Forces 2011-2014

## The Decade Ahead for AFT-Oregon

The Executive Council developed a rich, unfettered list of trends facing the State Federation and the state. They included:

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>■ Anti-union</li><li>■ Anti-government</li><li>■ Anti-public employee</li><li>■ Reduced opportunities in “traditional” organizing targets</li><li>■ Increased opportunities in “non-traditional” organizing targets (<i>i.e.</i>, charter schools)</li><li>■ Increasing cultural diversity<ul style="list-style-type: none"><li>○ Demographic and cultural shift in attitudes about labor</li></ul></li><li>■ Loss of meaning to contract expiration date</li><li>■ Loss of meaning to ‘membership’</li><li>■ Identify member as people working</li><li>■ Lack of investment in public service</li><li>■ Re-fight for old ground when economy revives</li><li>■ Healthcare</li><li>■ Threat to union movement philosophy</li></ul> | <ul style="list-style-type: none"><li>■ Anti-tax movement</li><li>■ Ideological battles</li><li>■ Income distribution between rich and poor</li><li>■ Demographic changes to collectivist cultural orientations challenging and transforming the U.S. individualism</li><li>■ Planning and development of bi-lingual leadership</li><li>■ Community/union partnerships that enhance success<ul style="list-style-type: none"><li>○ PCUN, CAUSA, Mano a Mano, Asian Pacific Alliance</li></ul></li><li>■ End of the War and impact on<ul style="list-style-type: none"><li>○ Veteran services</li><li>○ Education impacts</li><li>○ Budgetary realities</li></ul></li><li>■ Changes in how the goals, role and administration of education are framed and occur</li></ul> |
|--|--|

**Forces** are those views, attitudes, actions, politics and conditions that are continuously at work and influence on the ability to achieve the focus and intent. Forces identified by the Executive Council included:

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>■ Scapegoating public employees and public employment</li><li>■ Recession</li><li>■ Budget hole</li><li>■ New model for K-12 education from Governor to pre K-20</li></ul> | <ul style="list-style-type: none"><li>■ Education and district restructuring</li><li>■ Accountability and performance standards in education (from a business perspective to easy to track improvement)</li></ul> |
|--|---|

# Opportunities

In light of the identified trends and forces, evaluation of the strengths, capabilities and reputation of AFT-Oregon, and issues that may impede success in addressing or adapting to the trends and forces, the Executive Council identified specific activities that could benefit AFT-Oregon by building on the strengths or solving issues affecting the union.

- Develop traditional and non-traditional approaches to organizing
- Promote 'civic' model of education
  - *The business of educating versus education as a business*
- Strengthen member identity
  - *Who is a union member*
  - *Community relations and involvement*
  - *Compete with demands of time and attention*
- Mobilize around anger over anti-union/anti-public employee attacks—Tell our story
- Communicate labor history, issues and identities (media, education, etc.)
- Take advantage of increase in cultural diversity to build membership
- Educate the 'wait and see' generation to become leaders
- Be the Change to increase the Community versus the Individual
- AFT Teachers teach the paradigm shift, stop focusing on today and teach the next generation at the child/parent level
- Increase diversity in AFT-Oregon
- Increase organizing of non-traditional targets
- Increase connections with community organizations
- Tell our 'story' and reframe the debate about unions, public employees and the role of government

# AFT-Oregon Strategic Intent 2020

## And Five-Year Focus

The exploration and evaluation of all of these influences on AFT-Oregon led to identification of the strategic intent and development of a five-year focus for each. The result identified continuing objectives, modified objectives and new objectives that best describe success in the long-term. These will guide the leadership in measuring the union's application of resources, management in defining and organizing resources for programs to reach the description of success, and all staff in applying their special expertise to the description of success.

### **Communications**

**Strategic Intent** – A comprehensive program of communications to the highest level of member, local and public awareness and education.

#### **Strategic Focus**

- More story telling as narrative for inclusion into communication program
- Focused, tailored communications to the membership

### **Leadership Development**

**Strategic Intent** - Active leadership with high level of skills and competencies and comprehensive development programs

#### **Strategic Focus**

- Highly structured and sequenced training
- Promote strong, sustainable local leadership and local programs
- Enhance understanding of Executive Council membership and responsibilities

### **Organizational Capacity**

**Strategic Intent** - Healthy and vibrant union

#### **Strategic Focus**

- Define and outline roles and responsibilities of Executive Council, staff and locals
- Utilize existing strategic partnerships
- Financial strength
- Revisit strategic plan



## **Organizing**

**Strategic Intent** - Complete program of internal and external organizing

### **Strategic Focus**

#### **External**

- Strengthen and expand representation of workers and adjuncts at OUS
- Further integration of OSEA
- Integration of OEA

#### **Internal**

- Fostering and supporting locals to integrate more non-members and fair share
- Recognize and act upon opportunities as they become available (same in external organizing)

## **Political Action**

**Strategic Intent** - Progressive control of governing bodies

### **Strategic Focus**

- Identification of (employer) board positions for campaigns
- Recruit, support and elect candidates to school and college boards
- Increase direct member contact with elected officials
- Increase contributors and contributions to political action fund

## **Public Policy**

**Strategic Intent** - Inform, shape and define public policy

### **Strategic Focus**

- Process for policy creation and outreach
- Team of leaders and members for communication
- Influence media on AFT public policy
- Develop policy research capabilities

## **Solidarity**

**Strategic Intent** – Culture of inclusion and solidarity

### **Strategic Focus**

- Membership investment in strategic intent and mission of AFT-Oregon
- Union leadership models culture of inclusion
- Members have opportunities to interact with diverse array of other members to find commonalities in their values.



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