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ABSTRACT

The purposes of the Trust Agreement Project are to develop new forms of school organization and new patterns of relationships among teachers and school administrators, and to expand the range of labor-management discussions in education. Six California school districts participated in this experiment by selecting an area of educational policy in which each would attempt to craft a trust agreement. Lompoc, Poway, and Santa Cruz designated the area of peer assistance and review. Newport-Mesa chose staff development, and Petaluma selected the general area of staff evaluation. San Francisco chose to develop two trust agreements: a career development program for teachers' aides, and an elementary school level interdisciplinary literature-based reading program involving a single elementary school. Trust agreements developed have begun to alter the ways in which organizational decisions are made. Adversarial relationships have begun to give way to collaboration. Teachers are being included as partners in decisions about the structure and method of operation of school districts. The work of each trust agreement district is described. Subsequent sections of the report provide additional analysis of lessons learned this year and plans for the future. The appendix lists project participants by district. (15 references). (MLF)

Policy Paper No. PP88-9-7

The Trust Agreement Project:
Broadening the Vision of School Labor-Management Relations
A First-Year Progress Report

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September 1988

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Contents

Executive Summary

The purposes of the Trust Agreement Project are: 1) to develop new forms of school organization and new patterns of relationships among teachers and school administrators, and 2) to expand the range of labor-management discussions in education from the technical, procedural work rules that are the traditional purview of collective bargaining to substantive areas of educational policy.

The 1987-88 Trust Agreement Project was a collaborative effort of the California Federation of Teachers and the California School Boards Association, under the auspices of Policy Analysis for California Education (PACE). Six California school districts— Lompoc, Newport-Mesa, Petaluma, Poway, San Francisco, and Santa Cruz— participated in this unique experiment. Each district selected an area of educational policy in which it would attempt to craft a trust agreement. Lompoc, Poway, and Santa Cruz designated the area of peer assistance and review. Newport-Mesa chose staff development as its area of emphasis, and Petaluma selected the general area of staff evaluation. San Francisco chose to develop two trust agreements. One is a career development program for paraprofessionals (teachers' aides) to enable qualified individuals to earn teaching credentials. The other is an elementary school level interdisciplinary literature-based reading program involving a single elementary school.

First-year experience with trust agreements has led to seven tentative conclusions about the process:

1. Trust agreement discussions are substantively different from contract negotiations.

2. Strong union and district leadership are necessary components of trust agreement success.

3. Determining the policy area for trust agreement work is not nearly as thorny as developing a successful process by which to reach agreement.

4. The definition of a trust agreement is dependent on school district context.

5. Developing a network among participating districts is an essential element of the program.

6. Trust agreements may not be prerequisites to reform, but they serve as catalysts to speed change.

7. Trust agreements produce role changes.

Significantly, trust agreements developed in first-year project districts have begun conspicuously to alter the ways in which organizational decisions are made. Adversarial relationships have begun to give way to collaboration. Teachers are being included as partners in decisions about the structure and method of operation of school districts. These initial results provide hope that trust agreements can help school districts to "leap-frog" from the nineteenth century industrial model on which they are patterned to a new model of organization and decision-making more appropriate to schools of the twenty-first century.

Policy Analysis for California Education

Policy Analysis for California Education, PACE, is a university-based research center focusing on issues of state educational policy and practice. PACE is located in the Schools of Education at the University of California, Berkeley and Stanford University. It is funded by the William and Flora Hewlett Foundation and directed jointly by James W. Guthrie and Michael W. Kirst. PACE operates satellite centers in Sacramento and Southern California. These are directed by Gerald C. Hayward (Sacramento) and Allan R. Odden (University of Southern California).

PACE efforts center on five tasks: (1) collecting and distributing objective information about the conditions of education in California, (2) analyzing state educational policy issues and the policy environment, (3) evaluating school reforms and state educational practices, (4) providing technical support to policy makers, and (5) facilitating discussion of educational issues.

The PACE research agenda is developed in consultation with public officials and staff. In this way, PACE endeavors to address policy issues of immediate concern and to fill the short-term needs of decision makers for information and analysis.

PACE publications include Policy Papers, which report research findings; the Policy Forum, which presents views of notable individuals; and Update, an annotated list of all PACE papers completed and in progress.

The Trust Agreement Project:
Broadening the Vision of School Labor-Management Relations

A First-Year Progress Report

Preamble

The Stuart Foundations of San Francisco funded a one-year pilot project (September 1, 1987-August 31, 1988) to develop models of Educational Policy Trust Agreements in six preselected California school districts. The 1987-88 project was a cooperative effort of the California School Boards Association and the California Federation of Teachers, under the auspices of Policy Analysis for California Education (PACE). In 1988-89, the California Teachers Association will join the project.[1]

Purposes of the Project

The purposes of the Trust Agreement Project are: (1) to develop new forms of school organization and new patterns of relationships among teachers and school administrators and (2) to expand the range of labor-management discussions in education from the technical, procedural work rules that are the traditional purview of collective bargaining to substantive areas of educational policy.

Introduction

American education is at a crossroads. Recent reports on the state of the nation's schools have challenged the capacity of public schools to prepare the next generation of Americans to compete in the increasingly complex global economy of the twenty-first century.

A Nation at Risk, product of efforts by the National Commission on Excellence in Education, made headlines in 1983 when it warned that a "rising tide of mediocrity" threatened to engulf the nation's schools. Hundreds of reports followed *A Nation at Risk*. Each sounded the recurrent theme of an education system in desperate need of renovation and rejuvenation. Among the loudest calls for school reform were those echoing from the business and corporate communities.

[1] This report is written prospectively. The status of second-year funding for the Trust Agreement Project will not actually be known until the end of September 1988.

The reports that succeeded *A Nation at Risk* recommended fundamental changes in the way schools do business. These proposed changes are articulated in documents such as *A Nation Prepared: Teachers for the 21st Century*, the 1986 report of the Carnegie Forum on Education and the Economy. Carnegie boldly asserted that among the prerequisites for school reform were increased collegiality between teachers and among teachers and administrators, a "professionalized" teaching profession which offered teachers enhanced professional decision-making authority, elimination of the traditional walls of teacher isolation, and relaxing the traditional school bureaucracy. The overarching goal of these changes is improved student achievement.

California has been among the leaders in recent efforts to reform public schools. The 1985 report of the California Commission on the Teaching Profession, *Who Will Teach Our Children?*, has been hailed as a major force in the national school reform movement. In keeping with the theme of new relationships among school professionals and new forms of school organization, the California Commission recommended the following: *"Recommendation to teacher and administrator organizations, the superintendent of public instruction and local school districts: Develop demonstration educational policy trust agreements to formalize cooperation of teachers and administrators in educational improvement."*

Prior to the nascent trust agreement work now underway as a result of the Stuart Foundations-funded project, most of the formal decision-making contact between teachers and school administrators took place within the context of collective bargaining. In 1976 California enacted a law which gave public school teachers the right to collectively bargain a bilateral, legally binding contract with their public school employers. For more than a decade, school district management and elected teacher representatives have engaged in contract negotiations. The resulting contracts have established work rules in areas such as salaries and benefits, transfer and grievance procedures, work hours and assignments, and class size. Importantly, the process has brought teachers, administrators, and school board members together in an effort to reach agreement about specific areas of school policy.

For several reasons, many individuals both inside and outside the education community have now begun to recognize that collective bargaining alone will not enable school professionals to realize the goals of school reform so clearly articulated in the myriad reform reports. First, the structure of the formal bargaining process often breeds a "we-they" mentality, creating schisms between teachers and school management that may last long beyond the formal negotiation process. Second, the legal scope of bargaining is limited and excludes teachers from participating in decisions about important aspects of their professional lives. Curriculum, for example, is not a bargainable issue. Third, the rigidity of conventional labor contracts makes them relatively difficult to use as vehicles for education reform or innovation.

Developing new relationships among school professionals and new patterns of school organization which current calls for reform would seem to demand require

agreements that build in flexibility and adaptability to diverse and fluid situations. The Trust Agreement Project is designed to apply the organization and energy typically applied to contract negotiations of technical work rules to discussions that are explicitly educational in nature, to make levels of student achievement, teaching quality, and curriculum specific topics of discussion between teachers and school administrators. Developing replicable models of educational policy trust agreements is a means to foster growth and innovation in school labor-management relations as a springboard to continued school reform, enhanced educational productivity, and increased student achievement.

Structure of the Project

The California Federation of Teachers made a preliminary investment in trust agreements in 1986. During the 1986-87 school year, the CFT funded initial trust agreement trial projects in the Lompoc, Poway, and Petaluma school districts.

For purposes of the Stuart-funded project, the California Federation of Teachers and the California School Boards Association jointly selected six California school districts to become trust agreement districts. A prerequisite for each participating district was a written "commitment to try" letter signed by each superintendent, school board president, and president of the local teachers' union.

The six districts that comprise this unique experiment are: Lompoc, Newport-Mesa, Petaluma, Poway, San Francisco, and Santa Cruz. Each district selected the area of policy in which it would attempt to develop a trust agreement. Lompoc, Poway, and Santa Cruz designated the area of peer assistance and review. Newport-Mesa chose staff development as its area of emphasis, and Petaluma selected the general area of staff and student evaluation. San Francisco chose to develop two trust agreements. One is a career development program for paraprofessionals (teachers' aides) to enable qualified individuals to earn teaching credentials. The other is an elementary school level interdisciplinary literature-based reading program involving a single elementary school.

The project has been governed by an advisory board composed of James Guthrie, professor of education at the University of California at Berkeley and co-director of PACE; Gerald Hayward, director of the Sacramento PACE center; Miles Myers, president of the California Federation of Teachers; and Herbert Salinger, executive director of the California School Boards Association from 1982-88.

Two staff people served as consultants to project districts. Charles Kerchner, professor of education and public policy at Claremont Graduate School and author of the policy paper on trust agreements for the California Commission on the Teaching Profession, worked with

Lompoc, Petaluma, and Poway. Julia Koppich, assistant director of PACE, coordinated the overall efforts of the project and worked with Newport-Mesa, San Francisco, and Santa Cruz.

Representatives of all the trust agreement districts were brought together in March 1988 for a day-and-a-half long workshop. Titled, "Working Together to Improve Education," this workshop was attended by 32 teachers, administrators, and school board members. The purpose of this work session was to provide an opportunity for participating districts to share and critique each other's trust agreement efforts as well as for each district to develop its own trust agreement calendar for the remainder of the school year. As one participant said, the workshop provided an opportunity for teachers, administrators, and school board members to "take a step back from the details of our work, assess where we were, and plan for the future."

At the conclusion of the first project year, Charles Kerchner and Julia Koppich conducted in-depth interviews with project participants. Interviews were purposely designed to offer participants an opportunity to analyze what they believe they have accomplished in the first year as well as to discuss the work they believe remains to be completed. The results of these interviews compose the next section of this paper.

Summary of Results

As of June 1988, three districts had signed written trust agreements—Petaluma (on staff development), San Francisco, and Santa Cruz. Lompoc and Poway are expected to have written agreements in fall 1988. Assuming continuation of the project, Petaluma should conclude an agreement on evaluation, and Newport-Mesa on staff development, by the end of the 1988-89 school year.

Significantly, trust agreements developed in these project districts have begun conspicuously to alter the ways in which organizational decisions are made. Adversarial relationships have begun to give way to collaboration. Teachers are being included as partners in decisions about the structure and method of operation of school districts. These initial results provide hope that trust agreements can help school districts to "leap-frog" from the nineteenth century industrial model on which they are patterned to a new model of organization and decision-making more appropriate to schools of the twenty-first century.

The work of each trust agreement district is described below. These individual district summaries are meant to provide a flavor of the process and a feel for the atmosphere in which trust agreement discussions were conducted. Subsequent sections of this paper provide additional analysis of lessons learned this year and an assessment of the potential impact of this work.

LOMPOC

The Lompoc Unified School District and the Lompoc Federation of Teachers chose to develop a peer assistance and review program for new teachers and for experienced teachers who are "at risk." Guidelines for the program have been discussed and are currently being written. Program implementation is expected in fall 1989.

The Lompoc Unified School District serves approximately 8,900 students and employs 400 teachers. This Santa Barbara County district encompasses both the urbanized area around Lompoc (population 30,000) as well as portions of the surrounding farm country. A decade-long enrollment decline is ending, and the district anticipates hiring a large number of teachers in the next few years. Some of the new teachers will represent expansion induced by space and missile program development at Vandenberg Air Force Base, which the school district serves. Most of the new hiring, however, will occur because a large number of senior teachers is expected to retire.

Through its trust agreement , Lompoc seeks to change the culture of teaching in the district. A large proportion of the current teaching force was hired during the last local employment boom in the 1960s. The staff has weathered declining enrollment and difficult financial times. In the next five to seven years, nearly half of Lompoc's teachers will retire.

Lompoc determined to use its trust agreement time and money to revamp the district's teacher evaluation system. The focus of the change is peer review.

District and union leadership began the project by holding public meetings on the concept of Educational Policy Trust Agreements with the school board, teachers, public, and the press. Administrators and teachers from Toledo, Ohio, which has a well-developed peer assistance and review system, visited Lompoc to explain Toledo's program. As a result of this groundwork, Lompoc's trust agreement team built solid support among the administration, school board, and teachers to proceed with a peer evaluation plan that will involve both novice teachers and teachers whose professional performance puts them "at risk."

The union leadership in Lompoc is currently drafting a written agreement. District administration believes details can be worked out during fall 1988. The first supervising teachers, who will work with their new and "at risk" colleagues, will be selected in winter 1988 and spend the spring semester being trained for their new roles. The details of their selection and training have not yet been determined. Supervising teachers are expected to assume their new responsibilities in fall 1989.

Union and district leadership agree that new teachers will need to be socialized, not only to life in Lompoc schools, but also to the norms of the teaching profession. The trust agreement in Lompoc is seen as a vehicle to involve experienced teachers in the professional development of their new colleagues as well as in the maintenance of the quality of the experienced teaching force.

The Lompoc trust agreement involves teachers in an area of decision-making in which teachers have traditionally been reluctant to participate. Teachers will begin to evaluate their professional peers and they, rather than the administration, will assume responsibility for inculcating in their new teaching colleagues the norms and standards of their profession. Teachers will, thus, for the first time develop a common definition of the "good teacher."

NEWPORT-MESA

The Newport-Mesa Unified School District and the Newport-Mesa Federation of Teachers were unable to complete substantive work on a trust agreement during the 1987-88 school year. Below is a description of the circumstances that precluded successful development of a trust agreement in this district.

The Newport-Mesa Unified School District is located in Orange County. This K-12 district has 22 schools, 16,000 students, and 842 teachers in an area that includes ghetto and posh suburb. Heavy Hispanic and Asian, particularly Vietnamese, "pockets" of population are scattered throughout the district. The district, however, remains largely white, with a small black student population.

When the Trust Agreement Project began, both the union and district agree, trust between teachers and school management was at an all-time high. The union and district approached trust agreements with great enthusiasm and held three meetings in September to begin to develop plans for Newport-Mesa's project. The meetings were attended by administration and union leaders as well as by school board members. However, several events soon conspired to change a formerly cordial relationship to a heatedly adversarial one.

Fall 1987 found the union and district in the midst of contract "reopeners." A full three-year contract had been negotiated the previous year, but a clause in that contract provided for negotiations each year on salaries and fringe benefits. Those reopener negotiations became increasingly heated as the district's financial situation worsened.

From the union's perspective, the district had not made adequate preparations for a budget "crunch" it knew would come. When faced with fiscal problems, says the union, the district found itself "boxed in" and began to assert that the union had made promises which the union denies. The district claimed that the union had reneged on "negotiated promises," and the district had no choice but to "get tough with the union."

The union and district spent the entire 1987-88 school year in mediation and factfinding, processes mandated by law when the parties cannot reach a contract settlement on their own. As of June 1988, the contract remained unsettled.

Separate from contract negotiations, but no less damaging to relations between the union and district, intent-to-layoff notices were sent to nearly 200 teachers in March. These individuals' jobs were not threatened because the district considered them poor teachers, but because the district's worsening financial situation, coupled with declining enrollment at the high school level, caused the school board to vote to reduce the number of teachers employed in Newport-Mesa. In May the district sent final layoff notices to 144 teachers, more than 10 percent of the district's permanent certificated staff.

Trust agreements were not highest on anybody's agenda in Newport-Mesa in 1987-88. Both the union and district acknowledge that difficult contract negotiations, teacher layoffs, and the generally uncertain financial condition of the district made consideration of anything other than the crisis of the moment out of the question. As the assistant superintendent said, "You can't go through factfinding, layoffs, and near bankruptcy and maintain much trust on either side."

By the end of the 1987-88 school year, both district and union leadership concluded that they needed to begin to "mend fences." A committee of management and teacher representatives was established to attempt to collaboratively solve the district's financial problems. The union and district hope to use a trust agreement project in 1988-89 to further their fence mending.

The assistant superintendent, who functions as the district's chief negotiator and will likely be management's key representative on a trust agreement team, reports that the district is committed to collaboratively setting priorities and solving problems with the union next year. She believes the union must be involved in this process because, "You can't successfully change an organization without involving everyone. The union is the way to involve the teachers."

Discussions with union and administration representatives reveal that a deep mutual respect remains, despite the problems that ensued in 1987-88. Newport-Mesa has already discussed a potential trust agreement project for next year in the area of staff development. Currently, the district has a very limited staff development program that is administered from central office and is unable to adapt to the needs of different schools. The district looks forward to a trust agreement project to establish Professional Development Councils at each school site to enable a school's principal and teachers to devise a professional growth plan tailored to their school's needs.

PETALUMA

Petaluma Schools and the Petaluma Federation of Teachers concluded a preliminary trust agreement in the area of staff development in spring 1987 and are at work on a second agreement dealing with staff evaluation.

The Petaluma Schools are comprised of two jointly managed districts: an elementary district of just under 3,800 students drawn from the city of Petaluma, and a high school district of 4,600 students whose boundaries include a much larger rural and suburban area in Sonoma County.

The elementary schools are beginning to experience slightly increasing enrollments, but high school enrollments continue to decline sharply. The district is, therefore, feeling financially squeezed. Petaluma has avoided teacher layoffs, but just barely, and reassignments and duty changes have been common in recent years. The enrollment picture will change in the next decade as suburbanization pushes northward from San Francisco. In the process, the rural-small town ethos of Petaluma is likely to feel pressure.

This district has enjoyed a long history of stable, productive labor relations. Petaluma participated in a preliminary CFT-funded trust agreement experiment in 1986-87. That process produced an agreement on staff development. Petaluma's first trust agreement is, on its face, simple. However, this agreement has had widespread effects on the ways in which teachers think about their work and has provided a foundation for this year's trust agreement efforts.

Previously, staff development offerings in Petaluma were determined by a central office administrator with little or no teacher involvement. Teachers were dissatisfied with the program, as evidenced by poor attendance at district-sponsored staff development functions. Petaluma's staff development trust agreement transfers authority over four days of school time from the unilateral province of administrators to joint decision-making by teachers and administrators. As an outgrowth of the agreement, teachers for the first time have developed and expressed their own ideas of professional development, have discovered and implemented ways of promoting and recognizing their own expertise as teachers, and have taken initial steps to change teaching from an isolated activity to one in which they share in a collective responsibility for the quality of teaching in the district.

Teachers and administrators who implemented the new staff development program made a number of important decisions which reflect substantive changes in the district's professional development program. The staff development team substituted teacher experts for outside speakers as providers of staff development courses; worked across schools and grade levels rather than limiting opportunities to single grades, schools, or subjects; and allowed teachers to choose from a variety of offerings rather than assigning them to a single district-selected offering. Both teachers and school management agree these changes would not have occurred without the trust agreement on staff development.

Having instituted the staff development program, Petaluma undertook trust agreement negotiations on what the district and union call "the total evaluation system," meaning both student and employee evaluation. This task has proven to be a substantial thicket, and negotiators spent the better part of the 1987-88 school year discussing the kind of evaluation system they want, what its philosophy should be, and who should have responsibility for conducting evaluations.

To break the logjam, Petaluma's trust agreement team decided to begin by designing and implementing a new system to evaluate the superintendent and central office administrators. By late spring 1987, the team had developed a new evaluation form which was sent to each teacher and administrator in the district. Results of this evaluation are being used by the superintendent to set his goals and objectives for the 1988-89 school year. By the end of 1987-88, the trust agreement team had also begun to develop a procedure to enable teachers to evaluate site principals for the first time. Concern about teacher evaluation of principals and the uses to which this new evaluation material might be put has engendered substantial anxiety among Petaluma's principals.

Teachers, by their choice, are also beginning to grapple with a thorny issue, peer review. While teachers have yet to come to grips with the issue of peer evaluation, they now seem ready to embrace the idea, whereas a year ago it was so fearsome a topic that it could hardly be discussed.

Interviews with teachers and administrators reveal pride in being one of the first trust agreement districts and great satisfaction with the operation of the new staff development program. The old industrial line between workers and managers is being blurred. Staff development in Petaluma is now directed by a teacher and an assistant superintendent. This relationship brings together the two people thought by their colleagues to be the most knowledgeable about the subject, even though they are three hierarchical levels apart on a conventional organizational chart.

Staff development in Petaluma was previously a ritual, something administrators did with little zeal and to which teachers responded with even less. Now teachers are responsible for understanding the needs of their colleagues, equipping colleagues to present, and generally guiding the professional development program. As the assistant superintendent explained, "Quite literally, my job at the last staff development day was to stand back stage and pull the curtain."

At the same time, frustration exists that the evaluation process is taking so long to develop. As all the parties in Petaluma are coming to realize, evaluation is inherently a more explosive subject than staff development. Real stakes are involved, and there are significant differences of opinion about the legitimacy of teachers acting as evaluators. The trust agreement process has awakened a new sense of ownership of the educational process among teachers, and this new sense of ownership is implicitly challenging old assumptions about the proper relationship between teachers and school principals.

Nor are the differences in opinion limited to role differences between teachers and school management. What will prove interesting in Petaluma is determining whether the *process* of conducting trust agreement negotiations can lead to substantive agreements in situations in which the parties enter the bargaining arena with measurable differences about the scope and purpose of the topic under discussion.

Trust agreement team members realize the potential for divisiveness and as the 1987-88 school year closed, they adopted a slower and more deliberate attitude toward the evaluation process. They recognize the difficulties inherent in these negotiations and have set aside an intensive weekend for trust agreement negotiations shortly after the start of school in fall 1988. The 1988-89 school year will be given over to pushing forward with the evaluation process.

The trust agreement process has begun to alter significantly the way decisions are made in Petaluma. Involving teachers as decision-makers in staff development appears to be only the tip of the iceberg. Now that teachers have had a taste of professional decision-making authority, they are openly hungry for more. We believe pressure for change will continue to mount in Petaluma as teachers and administrators continue to redefine their roles and as teachers begin to assume more decision-making responsibility.

POWAY

The Poway Unified School District and the Poway Federation of Teachers developed and implemented a peer assistance and review program for first-year teachers. The union, district, and school board rate the program a success.

Poway is a rapidly growing suburban San Diego County school district of more than 20,000 students and 850 teachers in 19 school sites. The communities which feed into Poway schools are upper middle class; 72 percent of the families are classified as professional or semiprofessional. Only sixteen percent of Poway's students are non-white.

Historically, labor negotiations in Poway have been protracted and tense. Both the union and district viewed the trust agreement process as a possible palliative to an otherwise acrimonious relationship.

As a rapidly growing school district, Poway is now beginning to hire many new teachers. In 1987-88, for example, 125 new teachers were hired at 11 schools, and similar patterns are expected in successive years as older teachers retire and housing development accelerates.

The problem the district faces is that school principals cannot successfully supervise and socialize this large number of teachers. To meet this problem, the district-union trust agreement team devised a teacher-supervised assistance and evaluation program for first-year teachers. Based in part on the peer review system in place in Toledo, Ohio, the Poway trust agreement involves the transfer of both money and authority in the following respects: (1) the union has agreed to allocate $100,000 over which it had contractually negotiated authority to the new teacher project; (2) the district agreed that three senior teachers, jointly selected by the union and district, would be released from their regular teaching duties to implement the new peer assistance and review program; and (3) the union and district agreed to form a joint governing board to study the findings of teacher reviewers and make recommendations about continued employment to the superintendent and school board.

To create reasonable work loads, the trust agreement team decided to apply the new supervision system only to novice teachers in elementary and middle schools. New high school teachers and teachers entering the system with experience in other school districts were not included in the program. Each of the three supervising teachers worked with 38 novice teachers duing the 1987-88 school year. In early fall, supervising teachers primarily provided logistical assistance to new teachers, helping them order books, find supplies, and meet more senior teachers. This assistance stood in vivid contrast to the "sink or swim" introduction to classroom life which has historically greeted new teachers in Poway and elsewhere.

The fall visits by the supervising teachers were informal and their observations largely unstructured. Beginning just before the Christmas break, however, supervising teachers began to conduct rigorous evaluations of novices in their charge. These evaluations centered on three aspects of teaching: 1) classroom management, or the ability to establish an orderly learning environment; 2) knowledge of subject matter; and, 3) familiarity with at least the rudiments of pedagogy.

Supervising teachers demonstrated different techniques for the novices, provided informal feedback on individual lessons, offered support when beginning teachers wanted to "try something new," and even substituted in novices' classes to enable new teachers to observe more experienced teachers at work. This type of assistance and evaluation is in sharp contrast to traditional administrator evaluation which typically lasts only a few minutes and is often quite superficial. In Poway, new teacher evaluations this year lasted for several hours, covered more than one subject area, and were interspersed with frequent informal visits and much assistance.

The review panel, consisting of the assistant superintendent for instruction, assistant superintendent for personnel, president of the union, a teacher appointed by the union, and the project's director (an administrative appointee who is a teacher and former union president), began in the spring to review supervising teachers' evaluations of the novices. Supervising teachers presented their "cases" to the review board in the form of written summary evaluations of each candidate. The panel discussed each case and made decisions. Of the 38 novice teachers, three were denied second year contracts, three received marginal evaluations with specific suggestions for improvement, and 32 were "graduated" to second- year probation.

The Poway agreement is significant for several reasons. First, the new intensity of evaluation for first-year teachers signals to novices that the process of becoming a teacher is not simple or automatic; it requires work and skill. Second, Poway's program institutionalizes a support system for beginning teachers. Third, the involvement of senior teachers in assisting and evaluating novices sends a message to experienced teachers that their expertise is valued.

Certainly it is not the norm for unionized teachers to participate in dismissing one of their own. However, the three teachers whose contracts were not renewed in Poway had such obvious problems that dismissal was nearly rendered a non-issue. Of more significance, perhaps, is to focus on the 10 or so teachers whose performance was marginal before the intervention process began. These novices received substantial assistance, significantly more than that which would have been available without the program. Their school district and union made a substantial investment in these teachers' professional development and success in the classroom. As several principals noted, without this program, at least some of these novices would not have survived their first year of teaching. Now, say the principals, these new teachers can begin to contribute to the district and to their profession.

Finally, at least some circumstantial evidence exists that Poway's trust agreement process may offer the potential for improving a tense relationship between district administration and the union. Poway teachers began school in September 1988 with a negotiated contract, an event that has occurred only once in the past decade. While it may be a leap of faith to attribute conclusion of contract negotiations to participation in the Trust Agreement Project, it is the case that the essential ingredients of the new contract were developed during the March trust agreement conference. Thus, Poway offers evidence that even in districts in which labor-management relations may be characterized as less-than-cordial, trust agreements may provide a vehicle for substantial organizational change

SAN FRANCISCO

Two different trust agreements were concluded in San Francisco. One involved development and implementation of a Paraprofessional Career Program which enables qualified teachers' aides to return to college and earn teaching credentials. The second involved a single elementary school at which the faculty developed an interdisciplinary literature-based reading program.

The San Francisco Unified School District is a combined city and county K-12 district. Of the district's 64,000 students, nearly 84 percent are members of ethnic minority groups. Many students enter San Francisco schools speaking little or no English.

A. The Paraprofessional Career Program

The San Francisco Federation of Teachers has been the bargaining agent for the school district's paraprofessionals since 1977. Paraprofessionals, the majority of whom are women and minorities, work in classrooms primarily with students who are deficient in basic skills, such as reading and mathematics. Many San Francisco paraprofessionals have worked for the school district for more than a decade. They come to their jobs with a range of skill and training levels. Some have completed college degrees; others have only a high school education.

Several years ago, the union and school district negotiated a contract clause that established the intention of the parties to develop a career ladder for paraprofessionals. However, unpleasant relations between the union and a former superintendent precluded substantive work on such a program.

The current superintendent expressed renewed enthusiasm for a paraprofessional career program. Nearly half of San Francisco's teachers will retire by 1992. The superintendent and union agreed that paraprofessionals were a natural pool of potential teachers and, importantly for San Francisco, a potential pool of minority teachers.

The year prior to the Trust Agreement Project, the local union received an American Federation of Teachers grant for preliminary program planning. Continuation of that planning, which was a cooperative effort of the school district, union, San Francisco State University, and University of San Francisco, plus implementation of the initial phase of the program, constituted the trust agreement work for 1987-88.

An experienced teacher was jointly selected by the union and district to coordinate the paraprofessional career program. Eight paraprofessionals, all of whom had previously earned college degrees, were selected as the first group of program participants. These

individuals were screened and selected from among more than 75 applicants by a committee of teachers, administrators, and university representatives. Each selected applicant enrolled in the teacher preparation program at either San Francisco State or USF, depending on the type of teaching credential being sought. The universities provided partial tuition waivers; the district's trust agreement money funded the remainder.

At the beginning of the 1987-88 school year, experienced teachers who are part of the union's Educational Research and Dissemination Project provided workshops for program participants on classroom management techniques and first-year survival skills. The teachers who conducted the workshops received a small stipend from the trust agreement grant, but contributed many hours of volunteer time planning and implementing these workshops. Each teacher-to-be took university courses and student taught under the supervision of a master teacher. In addition, program participants met as a group during the year to discuss problems and review progress.

The union and district have now signed a written agreement detailing specifics of the program and outlining plans for expansion. These plans include working with San Francisco's community college and San Francisco State University's undergraduate division to enable interested paraprofessionals to earn bachelor's degrees and then teaching credentials. The agreement also includes a commitment from the district to hire as teachers individuals who successfully complete the career program.

Three individuals received teaching credentials in June 1988. Two have been employed as teachers in San Francisco. The third chose to accept a job in another school district. Remaining first-year program participants are expected to complete their credentials in January 1989 and be offered teaching positions in San Francisco at that time.

San Francisco's deputy superintendent for instruction has been the district's "point person" for the paraprofessional career program. She is enthusiastic about the program's potential: "This program can help to meet the district's need for teachers, especially minority teachers. In addition, paraprofessionals already know they like to work with kids, and the district knows they're good in the classroom. It's a 'plus' for both."

The union is equally pleased about the opportunity to do something productive for the people it represents as well as for San Francisco schools. As the president of the union noted, the AFT has been intensely involved in encouraging education reform and greater teacher involvement in setting standards for individuals entering the teaching profession. The Paraprofessional Career Program provides a unique opportunity for experienced teachers to develop programs to equip novices with the skills they need to be effective in the classroom.

Both sides acknowledge that even though the program needed to be developed, it probably would not have happened without the Trust Agreement Project. The deputy

superintendent again: "We hadn't focused on recruitment and without this project and this program, we probably wouldn't have until we were in the middle of a crisis."

The program is expanding in 1988-89 to include an increased number of participants and more directly involve experienced teachers in the teacher preparation component. Eventually, the union and district hope to institutionalize the program so that they do not need to seek outside funding for participants' tuition.

Perhaps as significant as the substantive accomplishments of the Paraprofessional Career Program are the new relationships that have developed between the union and top level school district management. The trust agreement program offered an opportunity for a new administration and the union to begin to work together in a collegial manner. Union and district representatives who have been involved in the trust agreement process agree that relationships forged as a result of this year's work are, indeed, cooperative and productive. Moreover, the union that represents what may be the school district's best hope for a large pool of needed teachers now has a defined stake in encouraging its members to enter the teaching profession.

B. Claire Lilienthal Elementary School

Lilienthal is a K-5 elementary school with 180 students and six teachers. It is an alternative school with a well-developed outdoor education program and draws students from throughout San Francisco.

Lilienthal is an aberrant but valuable trust agreement case. It is aberrant because the organization that represents teachers in this district (the California Teachers Association) is not a party to the agreement. It is valuable because Lilienthal is our only example of school site classroom teacher decision-making in action.

Lilienthal's trust agreement involved the entire faculty and the principal in cooperatively developing an interdisciplinary, literature-based reading program. This procedure is a departure from usual SFUSD practice. Traditionally, the district chooses a basal reading series that all elementary teachers are required to use. Once Lilienthal was selected as a trust agreement site, the principal met with the superintendent and secured his permission for the school to depart from the district-selected (actually, school board-selected) basal reader and develop its own reading program geared to the needs of its students.

Teachers contacted book publishers to discover what books were available, secured demonstration samples of a variety of literature-based reading books, "piloted" several in different classrooms, talked with people in other schools and districts who were familiar with the books under consideration, and then, as a group, chose the series and the

supplementary texts that they are using in 1988-89. The series they chose, *Odyssey*, integrates science, social studies, mathematics, language arts, and critical thinking skills. The works are drawn from well-known children's authors and include stories and poetry. Teachers used some of their trust agreement money, plus in-kind contributions from the school's PTA and the district's central textbook fund, to purchase multiple copies of supplementary texts, such as a junior Great Books series.

The teachers are extremely enthusiastic about what they have accomplished thus far, and, even as last school year drew to a close, they said they were looking forward to next year when they could continue to implement their new reading program. When asked what they liked about the trust agreement process, teachers spoke of being gratified at being considered "professionally competent" by the district and able to choose books appropriate to the school population and to individual teachers' teaching styles. As one teacher said, "For the first time in nearly 20 years of teaching in San Francisco, I actually got the books I selected."

Lilienthal teachers have begun to "network" with other elementary teachers throughout the district to share what they have learned. Their one frustration is that they do not have sufficient time—time to meet together as a group, time to visit other schools, time to plan.

District administration is no less enthusiastic than the Lilienthal teachers. Said the deputy superintendent, "Ownership [of curriculum] needs to be developed at school sites. Lilienthal is a model we hope to use at other schools in the district. It epitomizes what ought to be happening in terms of curriculum development in San Francisco." The deputy superintendent hopes to interest teams of teachers and administrators from other schools in visiting Lilienthal during the 1988-89 school year.

The change in the approach of the Lilienthal faculty from the beginning of the project in September 1987 to June 1988 is one of the most significant features of this trust agreement. In September, the faculty was wary of selecting texts on their own. Several of the teachers said that, while they were not pleased with the district-selected text, they found security in something that was familiar and district-approved. They questioned the amount of additional time they would have to spend on this project and many expressed fear that the district would be looking over their shoulders "evaluating" them. In addition, in initial faculty discussions about the project, teachers talked *at* one another or exclusively to the principal.

By June, the faculty had done a turnabout. Teachers were openly enthusiastic about their work. They said they felt revitalized. Discussions now are conducted among a group of colleagues; everyone participates. Importantly, the faculty now freely discusses its desire to choose its own books for other subjects.

Lilienthal School's trust agreement work provides evidence that school site decision-making can work, even in a large urban district with a well-developed central

bureaucracy. Teachers at Lilienthal hope to continue to build on the progress they have made and plan to continue to work together as a team. The school district intends to use Lilienthal as a model for other elementary schools in the district.

To those unfamiliar with curriculum design in large urban school districts, the Lilienthal experiment may seem quite tame indeed. Yet it is a source of continuing frustration to teachers in many large districts that they have little if any control over the content and construct of the subjects they teach. Moreover, in many large districts, San Francisco included, classroom teachers are only infrequently included in decisions about curriculum. More often, "curriculum specialists," who do not have classroom assignments, make the decisions about what those in the classroom will teach and what materials they will use. Thus, the Lilienthal agreement represents a significant departure from standard procedure and a substantial transfer of professional decision-making authority from central office to the school site.

SANTA CRUZ

Santa Cruz City Schools and the Santa Cruz Federation of Teachers developed a Professional Assistance Program involving peer assistance and performance evaluation for the district's teachers. The district and union have signed a written agreement which outlines the goals and operating procedures for the program. The first phase of the program, peer assistance and review of probationary teachers, will be implemented in 1988-89.

Santa Cruz City Schools is both an elementary and a high school district, with a single school board and a common administration. The district's 13 schools house 429 teachers and 9,000 students. Approximately 10 percent of Santa Cruz's students are Hispanic, 4 percent are black, and the remainder are white. Although few of the district's students live in poverty, more than half live in single parent homes. The district is growing rapidly at the elementary level, but will continue to experience declining high school enrollment for the next two years.

In recent years, contract negotiations between the union and district have been, according to the participants, often protracted. An outside mediator has been required three times in the last seven years. The most recent contract was not settled until April 1988, although negotiations had begun the previous summer. As one of the participants explained, "We always settle, but everyone always ends up mad at each other."

Despite its sometimes rocky labor-management relations, Santa Cruz is a district in which both the union and administration share a commitment to improving the teaching profession as a vehicle to enhancing student achievement. When the Trust Agreement Project began, the district and teachers were involved in contract negotiations. Both sides had agreed that the teacher evaluation system needed a major overhaul, but neither side was quite sure how to accomplish this.

The existing contract required annual evaluations of all district teachers. The procedure was typical of that used in many California school districts: a pre-observation conference between the teacher to be evaluated and the administrator who would conduct the evaluation, a brief classroom visit by the administrator, a post-observation conference, and a written evaluation report that became part of the teacher's personnel file.

Neither the superintendent nor union leadership believed the evaluation system served teachers well. Teachers perceived the system as "paper shuffling"; the administration considered it too time consuming. Both the union and district sought an evaluation system that would encourage teachers' professional growth and involve teachers more directly in the evaluation process.

The union and district determined to develop a trust agreement in the area of teacher evaluation. They recommended to the school board that a committee be established, composed of four teachers selected by the union and four administrators selected by the district, to develop a new evaluation system, with a special eye to peer review. The school board approved the proposal and the committee began work in January 1988.

The trust agreement committee met regularly from January through the middle of June. The committee gathered information about existing peer review systems and brought individuals from the Toledo Public Schools (which has a model peer assistance and review program) to Santa Cruz. A Santa Cruz teacher and principal visited Poway, another trust agreement district which also was developing a peer review program, to exchange ideas and information. By March 1988, the trust agreement team had set as its goal initiation of a peer assistance and review program for first year teachers in 1988-89.

Throughout March and April, union and district representatives developed a statement of purpose and program guidelines. The trust agreement team spent May refining plans and developing a final proposal, which was unanimously approved by the school board in early June. The program's statement of philosophy summarizes its goals: *The Professional Assistance Program is a cooperative effort by the Santa Cruz City Schools and the Santa Cruz Federation of Teachers to improve instruction by establishing and maintaining the highest educational standards for our profession. The program will expand the role of teachers by utilizing their expertise together with that of management to provide collegial support and evaluation.*

Santa Cruz is implementing the first phase of the program, peer assistance and review of probationary teachers, in the 1988-89 school year.

According to both the union and administration, the trust agreement process served several important functions. It provided a forum in which the parties could develop a new evaluation system which both agreed was needed, but neither knew how to approach. The process also established a regularized way for the union and district to work together on an issue both agreed was important for the schools. In addition, the trust agreement team found itself discussing items not specifically related to evaluation, but important to the functioning of the district.

The frustration expressed by both sides involved time. There was not enough of it to do all of the work the team wanted to do. As the superintendent said, "You just can't do creative thinking at the end of the regular work day." Both the union and administration reported that the March 1988 trust agreement project-wide "retreat" was extremely helpful in that it provided an opportunity for the Santa Cruz team to get away from the press of everyday crises.

Both sides stated that the trust agreement process differed significantly from collective bargaining. First, communication was collegial. There was little of the posturing that characterizes contract talks. As one union representative said, "Both sides showed an openness to possibilities. No one reverted to roles. This [the trust agreement] was viewed as a joint endeavor."

Second, the superintendent was directly involved in trust agreement talks. In Santa Cruz, as in many California school districts, the administration is represented at the bargaining table by an outside attorney. The superintendent is thus one step removed from the bargaining process. But the superintendent remained a major player in trust agreement talks and his involvement, according to both sides, contributed to the overall success of the project.

Third, when a problem occurred in the trust agreement process, the sides approached a solution differently than they would have if these had been standard contract talks. For example, in April 1988 the union distributed a leaflet describing the trust agreement work. The union thought the leaflet simply used the language of teacher empowerment, but the superintendent believed the flyer went too far, implied "teacher takeover," and undermined his efforts to persuade reluctant middle managers to accept the new evaluation process. According to both the union and district, if this incident had happened in the midst of contract negotiations, talks might well have broken down. But because this was the trust agreement arena, the superintendent and union met, aired their differences, and talks continued uninterrupted.

How is the situation in Santa Cruz different now than it was prior to the trust agreement process? The union and district report their relationship is much improved. They discuss issues that both sides previously considered "off limits" and are approaching issues that formerly would have created a "split" between the sides in a more cooperative fashion. The superintendent says, "Union and management now have a sense of shared responsibility for the district that didn't exist before." This new sense of shared responsibility prompted the superintendent to invite the union, for the first time, to be part of the district's budget-building process.

Importantly, both sides report that levels of trust and mutual respect have risen. In fact, the union and district are now discussing ways in which the relationship they have developed as a result of trust agreement work can be used to develop a more collaborative approach to contract negotiations.

Would the new evaluation program have been developed without the Trust Agreement Project? "Maybe, but just maybe," say both sides. Without the project, report the union and district, concluding agreement on a new evaluation procedure would not have been on the district's "front burner." The project made a difference in terms of the level of district leadership involved and the level of district commitment. The statewide visibility of the project, plus university and CSBA involvement, helped the school board to focus on the issue. And the timeline imposed by the project, say the union and district, meant that

"real work" got done this year. "I think," said the superintendent, "without the project, we might have ended the year still discussing philosophy."

Perhaps most significantly, as a result of their trust agreement work, the union and district have adopted a new theme: "As a team, we can make it work." Said one participant, "When we were invited into the trust agreement [project], we felt we should behave in a certain way. We had to begin to use the language of trust."

The Santa Cruz trust agreement, like that in Lompoc and Poway, brought teachers into a new decision-making arena. In this district, as in the other two in which peer review is the subject of the trust agreement, decisions about retention of probationary teachers have ceased to be the sole province of school administrators. Teachers' stake in high standards for their profession is receiving expression as Santa Cruz's teachers begin to assume, in collaboration with school management, responsibility for ensuring the continuing quality of individuals who become teachers.

An Evolving Definition of a Trust Agreement

The need for what we now call trust agreements developed from converging pressures. First, the current school reform movement generated pressure for organizational change designed to move school districts away from the 19th century factory model which characterizes most of them to the more modern pattern of organization adopted by successful corporations. Second, individuals on both sides of the bargaining table began to recognize that collective bargaining's traditional focus on standardized work rules and adversarial relationships may not provide the appropriate arena for discussions of the organizational change envisioned by school reformers. Thus, there developed a need for a new social invention to bring unionized teachers and school managers together as collaborators to solve complex organizational problems in which both had a stake.

Trust agreements were initially conceptualized as agreements on professional matters which would be concluded by parties who usually meet across the collective bargaining table to solve standard teacher working condition problems. Where collective bargaining dealt with the "bread and butter" terms and conditions of employment, trust agreements would revolve around professional problems of schools as organizations—problems of student achievement, school restructuring, staff and career development, and teacher evaluation.

As the Trust Agreement Project has proceeded, we have begun to refine our definition of a trust agreement. The foundation definition from which we began our work still applies: An Educational Policy Trust Agreement is a negotiated compact between a school district and teachers, represented by their union. Trust agreements are intended to specify educational problems of joint concern to teachers and school management and to establish procedures for attempting to resolve these problems.

However, during the first year of this project, we have begun to expand our notion of a trust agreement. We have come to learn that the trust agreement *process* and the trust agreement *product* are not easily separable.

The written trust agreement is the product that "shows." It is a tangible symbol, or indicator, that "something" has happened in that school district. The written agreement provides evidence that authority over an area of school policy has been transferred from school management to teachers or is now being shared by teachers and administrators. During the next year, we plan to develop a format districts can use as they craft their written trust agreements. The written trust agreement, we believe, must contain several component parts: 1) a purpose statement, which delineates the parties to the agreement, the agreement's goals, and the scope of the undertaking; 2) identification of resources to be deployed, including money, time, personnel, and authority; 3) implementation clauses which delineate program structure and assign responsibility for executing the agreement; and 4) a mechanism for resolving disputes that might arise under the terms of the agreement.

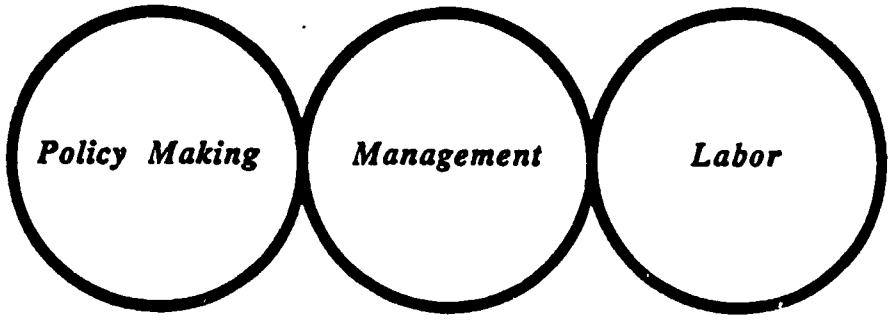
Of at least equal significance to the written agreement is the product that does not "show," and that is the changed relationship between teachers and administrators. This changed relationship, embodied in part in the written document, paves the way for significant alterations of a school district's organizational structure. This new relationship is born out of the *process* of reaching a trust agreement.

Thus, the definition of a trust agreement is an evolving one. As the project moves into its second year, our task is to define more clearly the process or set of processes which produce trust agreements as well as to develop a standardized format for the written trust agreement.

An Emerging Model

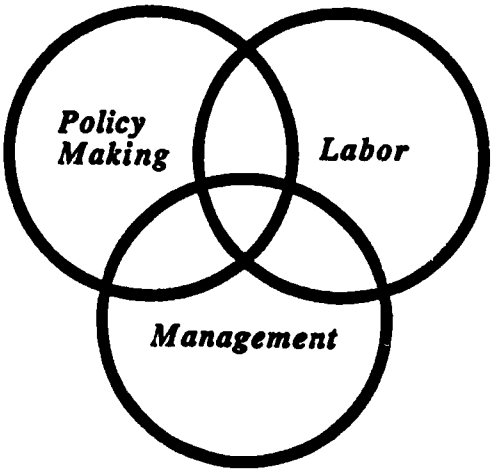
Imagine the operation of a school district as represented by three circles. One circle is labelled "policy making," a second is labelled "management," and a third is "labor." The policy making circle is the school board. Management is the administration. Labor is the teachers. These three circles abut, but rarely overlap.

Traditional School District



In a conventional school district setting, policy making is the province of the locally elected school board. Management of the district is the responsibility of school administration. Teachers retain the role of labor, the hired help. This may be an exaggerated illustration of the delineation, but it is the case that where policy making, management, and labor in school districts are concerned, the twain rarely meet. The goal of trust agreements is to expand the overlap among the three circles. The process of reaching trust agreements begins from the assumption that policy makers (school board members), management (administrators), and labor (teachers) can be brought together to collaboratively solve the educational and professional problems facing a given district.

Trust Agreement District



The beginning "boundary" for a trust agreement is collective bargaining. This is the point from which the process begins. The outside "boundary," however, is indeterminate because trust agreements celebrate local diversity. What is reform, restructuring, a trust agreement in one district may not be that in another, or may go by a different name.

Trust agreements are meant to alter the ways in which decisions are made in a school district by transferring money or authority or both, either from administrators to teachers or to a teacher/administrator collaborative. As decision-making processes are modified, the three circles—policy making, management, and labor—begin to encroach upon one another. Indicators that the common area among the three circles is increasing might include: a) a top-down school district management being replaced by shared district-wide management, in which teachers play a larger role; b) a centrally-controlled district shifting to school site management; c) a district that offers only traditional, tried-and-true educational programs allowing some exploratory programs that are developed as a result of significant teacher involvement; d) movement away from a situation in which all work rules are governed by a central contract to contract waivers which allow site deviation for individual school programs.

Below the surface of each of these indicators lie program benchmarks of progress. Each of these programs—each trust agreement—is a leverage point for change. For example, the peer review programs in Lompoc, Poway, and Santa Cruz, the staff development program in Petaluma, and the Paraprofessional Career Program in San Francisco represent newly shared management at the district decision-making level. Prior to the trust agreements, management in each of these districts was the sole province of

school administrators. Lilienthal's curriculum project is an example of school site management in a district in which central control has been the norm.

As we proceed into year two of the Trust Agreement Project, we will develop other indicators that project districts are altering their decision-making procedures and that the three circles, representing policy making, management, and labor, are beginning to converge.

Some Tentative Conclusions

First year experience with trust agreements has led to seven tentative conclusions about the process:

1. Trust agreement discussions are substantively different from contract negotiations. In standard bargaining talks, there is often the sense of a winner and a loser. Trust agreements, however, do not appear to be viewed by either teachers or school management as a zero-sum game.

   Trust agreements appear to move discussions from a dialogue over positions to a conversation about mutual interests. Everyone is viewed as having a stake in the health of the organization, and discussions become cooperative problem-solving sessions. As the superintendent in Santa Cruz noted, "[As a result of the trust agreement process], union and management now have a sense of shared responsibility that didn't exist before."

   The partisan "tugs-of-war" that often characterize collective bargaining discussions seem to occur with less frequency in trust agreement discussions. Discussions at the meetings of Poway's peer review panel, for example, revolve around professional issues related to first-year probationary teachers. Taking positions and establishing turf seem to have little place at these meetings.

   Preliminary evidence exists that new relationships forged as a result of trust agreement work may have a "spillover" effect into the traditional bargaining arena. At least one trust agreement district, for example, is considering conducting negotiations on a successor contract in a different and more collegial manner than has characterized bargaining there in the past. Additional time is needed to determine if this goal can be realized.

2. Strong union and district leadership are necessary components of trust agreement success. Both the district and union must be led by individuals who are confident

of their support, willing to take risks, make changes, even make mistakes. In Lompoc, Poway, and Santa Cruz, in particular, secure union leadership and confident superintendents made change possible. These districts ventured into the riskiest trust agreement arena, peer review. Yet these districts are among the most successful at least in part because the union and the administration approached the trust agreement process as peers. In situations in which either union or district leadership is less secure or is risk averse, less progress is made in the trust agreement arena.

3. Determining the policy area for trust agreement work is not nearly as thorny as developing a successful process by which to reach agreement. In all six of the trust agreement districts, union and management expeditiously determined the policy area in which they would attempt to craft an agreement. Yet when the parties realized they were not at the collective bargaining table, they often had trouble knowing how to proceed. With but few exceptions, neither teachers nor administrators were sufficiently skilled in goal-setting, team building, cooperative problem-solving, or long-range program development to readily devise a process by which to forge a trust agreement.

Trust agreements shake conventional notions of union-management bargaining. They challenge teachers and school managers to reach collaborative decisions. Thus, trust agreement negotiations call for a different set of skills than parties to traditional collective bargaining may possess. Trust agreements are built from cooperation, not conflict. Thus, the parties to trust agreement discussions must learn the skills of cooperative goal setting and consensus decision-making. These skills are not generally part of the training program for either teachers or administrators, union leaders, or district management.

4. The definition of a trust agreement is dependent on school district context. What is usual in one school district may be considered an unnatural act in another. For example, the Lilienthal reading program is a trust agreement in San Francisco, but faculty development of curriculum may be standard operating procedure in another district. Thus, individual district variables, such as size, current relationships among the parties, district history, and community composition directly affect the definition of a trust agreement. Understanding the context in which a trust agreement is to be developed makes it possible to tailor the agreement to the particular district. The trust agreement thus becomes one for which district participants feel ownership, rather than a "canned" program imposed from the outside.

5. Developing a network among participating districts is an essential element of the program. Education professionals have some, albeit limited, opportunities to meet with their counterparts in other districts. These exchanges normally occur at

conferences of professional organizations. However, each of these professional organizations involves just one segment of the education community, be it teachers, administrators, or school board members. No natural cross-role networks exist for educators.

Comments from those who attended the March 1988 project-wide trust agreement conference as well as evidence from the few additional inter-project contacts point to the importance of developing an ongoing network among districts engaged in trust agreement work. Such a network reinforces the feeling that "we are not alone" and renders risk-taking less frightening and, therefore, more possible. The fact that three districts were attempting to establish peer review programs and each knew of the others' work, emboldened each district to forge ahead. In addition, a network of participants affords district trust agreement teams an opportunity to learn from one another, precluding reinvention of the wheel. Santa Cruz, for example, visited Poway (which was further along in developing its program), gained valuable insights and avoided unnecessary pitfalls as it developed its own peer assistance program.

6. Trust agreements may not be prerequisites to reform, but they serve as catalysts to speed change. The changes that are taking place in the six trust agreement districts may have occurred without the Trust Agreement Project. The obvious problem with this type of speculation is that one can never reach a definitive conclusion. However, sufficient evidence exists that, absent the trust agreement forum, progress in project districts in the reform areas in which they chose to build their trust agreements would have been considerably slower. Santa Cruz, for example, readily acknowledges that without the trust agreement arena, the district and union would have ended the 1987-88 school year still discussing philosophy, rather than with a program ready to implement in the succeedingschool year. Both teachers and school managers in Petaluma say, "We do act differently now." Trust agreements give everyone involved the opportunity to move the issue of organizational change into a legitimate decision-making arena. Reform and restructuring thus cease to be simply issues for idle conversation and instead become topics of serious debate in a setting in which action is the ' product.

7. Trust agreements produce role changes. We have found an enormous unfreezing of old assumptions about who does what, and realization that this change is underway is causing discomfort and tension in some of the project districts. Administrators are recognizing that role relationships established in the trust agreement setting carry over into other settings as well. As one administrator stated, "I realized that I can't work cooperatively and as a peer [on] this [trust agreement] and then turn around and be high-handed with the same person the next day." Union leaders are asking themselves how adversarial they can be, and under what conditions they should assume their traditional posture as the opposition.

For teachers, the key role change involves conspicuous demonstrations of engagement in and commitment to teaching as an occupation. Being a good teacher with the classroom door closed is no longer enough. The developing idea in these districts is that teaching requires a substantial purchase on the art and craft involved and a commitment to publicly define what good teaching is so that others will agree.

For administrators, the key role change involves the idea that power is expandable. Administrators begin to recognize that having powerful employees does not necessarily mean that administrators become less so.

Potential Impact of Trust Agreement Work

Background

Discussions surrounding the current education reform movement have highlighted the coming crisis in teaching. If California schools are to compete for the "best and brightest" teachers to provide the most effective education for the state's students, then mechanisms must be found to provide teachers with more involvement in key decisions which affect their professional lives. Each of the reform reports, from the 1985 report of the Committee for Economic Development, *Investing in Our Children*, to *Vision: California 2010*, the report issued in May 1988 by the California Economic Development Corporation, emphasizes the need for increased teacher involvement in educational decision-making.

As professional opportunities for women and minorities, who compose the bulk of the teaching population, continue to expand; as teachers' salaries, though improved, remain insufficient to serve as a lure for the profession; and as working conditions in many school districts remain less than adequate, teaching continues to be a profession in search of adequate numbers of highly qualified individuals to fill its ranks. This problem represents "a prime public policy challenge because no matter how imaginative, inspirational, and engaging the spectrum of contemporary curricular and instructional reforms [California may contemplate], education reform proposals depend crucially for their implementation upon cadres of [qualified] classroom teachers" (Guthrie 1987).

Ample evidence exists that California teachers are frustrated by their lack of professional decision-making authority and limited opportunities for collegiality. A 1985 Metropolitan Life/PACE survey of California teachers revealed that fully half of the state's teachers are seriously considering leaving the profession within the next five years because of limited opportunities for involvement in determining educational policies which lie at the heart of their professional lives. (*The Metropolitan Life Survey of the California Teacher 1985*).

A companion PACE report illuminates the specifics of teachers' frustrations. That survey of California teachers found that: (a) 96 percent of teachers think they should participate in selecting their schools' curriculum, but only 41 percent are provided the opportunity to do so; (b) 98 percent of California's teachers believe teachers and administrators should work together to establish school routines like bell schedules and student discipline policies, yet only 42 percent of the teachers surveyed report this type of collaboration exists at their schools; (c) fewer than half of the teachers (42 percent) report that principals consider teachers' preferences in making teaching assignments; and, (d) 87 percent of California's teachers say they believe they could improve their own professional performance by observing their colleagues teach, but only 6 percent say they have an opportunity to visit other classrooms (Koppich 1986).

The California Commission on the Teaching Profession took special note of this issue when it stated in 1985 that, "Teachers must participate in the task of managing and reforming their schools" (*Who Will Teach Our Children?* 1985). This problem remains as critical today as it was in 1985. A newly released report by the Carnegie Foundation for the Advancement of Teaching asserts that while the school reform movement is making progress on some fronts, teachers are still too often left out of the decision-making loop. Said Ernest Boyer, chair of the Carnegie Foundation, "What is urgently needed in the next phase of school reform is a deep commitment to make teachers partners in renewal at all levels."

Compounding the problem of a potentially accelerated teacher attrition rate is the sobering fact that policy analysts estimate that California will need between 15,000 and 17,000 new teachers in each year between now and 1990 simply to meet demand created by school enrollment growth and "normal" teacher attrition (Guthrie, et. al. 1988). Simply stated, California will be hard-pressed to compete for competent professionals to staff its classrooms without substantive changes in the work teachers do and the responsibilities they are able to assume.

Taking a Page from the Corporate Book

Thomas Peters and Robert Waterman published *In Search of Excellence* in 1982. Readers from the corporate world and beyond made this book, in which the authors detailed "lessons from America's best-run companies," a national bestseller.

Peters and Waterman identified eight attributes of the most successful companies: 1) a bias for action—good companies do not just talk about doing things, they act; 2) staying "close to the customer"—successful companies never lose sight of who they exist to serve; 3) autonomy and entrepreneurship—the most successful corporations encourage their employees to think creatively and to experiment; 4) productivity through people—

employees, not technology, fads or gimmicks, are viewed as the key to corporate success; 5) hands-on, value driven management—successful corporations have a strong, deep-rooted culture based on a set of shared values which consistently propel the organization forward; 6) "stick to the knitting—these companies continue to do what they do best; 7) single form, lean staff—organization is characterized by few layers of central administration; and 8) simultaneous loose-tight properties—good companies foster a climate in which dedication to core values combines with opportunities for individual action and development.

Simply stated, some of the most successful American businesses now recognize that employee participation is an essential component of a commitment to improve. Trends in management research and practice over the last 50 years demonstrate that where employees and managers view program design and implementation as a collaborative rather than a competitive process, productivity increases.

One year after the release of *In Search of Excellence*, the nation's current education reform movement began. School reform reports echoed the call for school restructuring and reorganization. Many school reformers began to look to the business world for guidance, and discovered striking parallels between schools and corporations. School reformers recognized that schools, as productive, modern organizations, fall short on almost every dimension of Peters' and Waterman's scale of the successful corporation. Where successful corporations are governed by a deeply ingrained corporate culture, most school districts lack this level of shared commitment, this "corporate" ownership. Where the most productive companies encourage experimentation and individual initiative, school districts more often rely on standardized curriculum and tolerate little deviation from standard practice. Where successful corporations have adopted participatory styles of management, most school districts continue to be based on the top-down, factory model of operation.

To be sure, many would argue that conditions have improved. Prior to collective bargaining, decisions about teachers and teaching were made almost exclusively by school management. Teachers had few degrees of professional decision-making freedom. The collective bargaining law, born out of teachers' frustration over their inability to control even the most rudimentary aspects of their professional lives, represented an important legislative attempt to institutionalize a system of shared teacher-school management decision-making in an atmosphere of order and procedure. However, the narrow scope of bargaining and centralization of work rules characteristic of a contract can sometimes serve to limit rather than expand opportunities for professional decision-making and teacher-administrator collaboration. An additional forum was needed to expand the range of discussions, nature of decision-making, and opportunities for productive action.

The Link to Trust Agreements

Trust agreements may prove to be a missing link between collective bargaining and professionalizing teaching. Formal contract negotiations establish minimum terms and conditions of employment, but may not be the appropriate arena for shared teacher-management decision-making in areas of educational policy.

Trust agreements offer the potential to serve as a vehicle to bridge that gap between discussion of standardized work rules and teacher involvement in policy discussions that, arguably at least, fall outside the scope of bargaining. Trust agreements broaden the range of topics of discussion. They provide a legitimate, recognized forum in which discussions of critical education policy areas that relate directly to the classroom can productively occur. Moreover, the programs that emerge from trust agreement discussions can fundamentally alter the pattern of school district organization.

Trust agreements serve as a complement to collective bargaining, not as a replacement for it. The collective bargaining process produces important decisions about the work lives of *individuals*. Trust agreements facilitate collective teacher-school management decisions about the structure and functioning of the *organization*. Trust agreements provide an arena for collaborative problem solving in potentially thorny areas in which the problem may be recognized by all parties, but a solution seems self-evident to no one. Solutions that are developed as a result of trust agreements appear to allow participants to relinquish individual roles as they forge a collective vision of education.

In addition, we believe trust agreements represent a fundamental and important shift in the direction of education reform in California. Viewed in this light, trust agreements are not primarily a labor or union issue. They are an issue of increasing significance to public education.

California's 1983 omnibus education reform law, SB813, was reflective of the prescriptive reform of the day. It was what AFT president Albert Shanker termed, "push button reform." SB 813 represented add-ons to the existing educational system—more time, more requirements, more tests. While SB 813 served as the catalyst for some significant reform strides, and pumped badly needed dollars into California's financially sagging education system, the law begged the question of the capacity of the state's school system to respond to the challenges it faces.

Trust agreements chart relatively uncharted reform territory. They represent innovation, new forms of organization, and new relationships. They are neither "business as usual," nor add-ons to the existing educational system.

Trust agreements are fundamentally about new patterns of decision-making away from the collective bargaining table. They explore areas which, at least in the local district context,

previously have been considered "off limits" for teacher-management discussions. They involve the transfer of money or authority or both, either to teachers directly or in a shared arrangement between teachers and school management.

In the process of developing trust agreements, roles begin to change as assumptions about "who does what" unfreeze. Administrators begin to recognize that power is expandable. Teachers talk more openly about their expectations for their profession. In Poway and Santa Cruz particularly, teachers initiated lengthy discussions about how they define a "good teacher." Union and district leadership attempt to strike balances among the good of the district, the good of the union, and the good of individual teachers/union members.

The Trust Agreement Project has given participants permission to take risks. It has allowed them to experiment with programs that hold the potential for significant reform, but which, absent the "safety net" provided by this project, they might have been reluctant to try. Peer review, teacher-run staff development programs, and teacher-developed curriculum may someday be the norm. For the present, however, these policy areas in which trust agreements have been forged are not the norm. Rather, they represent areas of substantial risk-taking that carry the potential for great change for teachers and administrators. Discussing tolerable or acceptable levels of risk as a necessary component of innovation and change appears to have begun to become a cooperative teacher-management task, rather than an issue to be avoided altogether.

Trust agreements offer the potential to change organizational structures within school districts as teachers and administrators assume new roles and responsibilities. They move reform away from prescriptive formulas and into the arena of structural change as the lines between administrative responsibility and teacher task begin to blur. Importantly, trust agreements encourage teachers and school managers to assume collective responsibility for educational processes and outcomes.

Finally, trust agreements bring a neglected partner, the locally elected school board, back into the mainstream of educational decision-making. An article in the September 1987 issue of *Kappan* magazine reports that, "Local school boards in most states have been ignored or cast in passive roles as inconsequential reactors [in education reform] rather than as partners" (Danzberger). The tripartite trust agreement process, involving teachers, administrators, and school board members, makes school boards active participants in rather than passive reactors to education reform in California.

Plans for Year Two

The Trust Agreement Project in its present form represents a piece of unfinished business. Trust agreements appear to have the capacity to establish a climate in which organizational growth, learning, and development can occur. "Organizational learning implies taking risks, finding out what works and [what] does not work, and acting on that knowledge. [But] organizational learning requires time: time to seek alternatives and [time to] implement change" (Benveniste 1987).

One year has proven insufficient to determine the extent of organizational growth and learning or the degree of institutional change that trust agreements can produce. We, therefore, plan to devote an additional year to working with the six original project districts.

We also believe that, while it may be too early to close the book on the six original project districts, sufficient evidence exists that we have initiated important seeding efforts. Districts have ventured into new areas of discussion, have begun to alter lines of authority and patterns of decision-making, and have started down the road to school restructuring. We have learned much in the first year of the project. For that reason, we plan to apply to lessons of the project's first year to an expanded set of project districts.

In the second year, six new districts will join the project, bringing the total number of Trust Agreement Districts to twelve. Importantly, the California Teachers Association will join the project this year (1988-89). With the addition of CTA, the project will include the organizations which represent more than ninety percent of California's teachers.

Of the six new districts that will join the project, three are represented by the California Federtion of Teachers for purposes of collective bargaining and three are represented by CTA. The three new CFT districts are Berkeley Unified, Morgan Hill Unified, and the Oxnard Union High School District. CTA districts are Cambrian Elementary, San Diego City Schools, and San Juan Unified.

In year two of the Trust Agreement Project we hope to accomplish several important practical tasks. First, we have learned that most teachers and administrators in California know little of the school reform efforts taking place across the country. We believe that providing trust agreement participants with first-hand knowledge of reform programs currently being implemented in Rochester, New York; Dade County, Florida; Pittsburgh, Pennsylvania and other places will help California school people expand their horizons and elevate their expectations of what is possible.

Second, we have learned that developing collaborative relationships requires new skills. Goal setting, cooperative problem-solving, and consensus-building are not the norms of operation in most school districts. Thus, we plan in the second year to provide

training workshops to all twelve project districts to enable them to develop the organizational and analytical skills they need to succeed.

Third, project districts need to develop agreed upon procedures for resolving disputes that may arise in the implementation phase of trust agreements. Dispute resolution may involve the intervention of formal strucutures, such as the Federal Mediation and Conciliation Service or the American Arbitration Association. Alternatively, districts may agree on a less formal method by which to handle disagreements. None of the trust agreements committed to writing thus far contains a method for resolving disputes. Some adjudication procedure, or set of adjudication alternatives, needs to be developed.

Fourth, we believe a functional network needs to be developed and institutionalized among project districts. Limited first-year experience with inter-project contact among districts points to the enormous advantages to be gained through a mechanism which enables Trust Agreement Districts to learn from one another. This inter-project network is currently only in its most formative stages and needs attention in year two of the project.

In addition to our concern with the practical realities of the project, year two will provide an opportunity to develop more fully the conceptual framework we believe undergirds trust agreements. Specifically, our research will be guided by the search for answers to three overarching questions: 1) What are the implications of trust agreements for traditional collective bargaining?, 2) Are there necessary or desirable preconditions for trust agreements?, and 3) How can trust agreements bring about institutional change and help to reorder relationships in ways that productively alter the functioning of a school or district?

We believe that concluding trust agreement development and implementation in first-year project districts, building on what we have learned with a second set of project districts, resolving the outstanding issues, and answering the questions that remain will allow us to develop a set of trust agreement indicators. These indicators will provide a working definition of trust agreements adaptable to variable conditions in a variety of school district settings.

Conclusion

The efforts of the initial trust agreement districts represent progress in school reform. School teachers and administrators have begun to think differently about their roles and act differently in their jobs. The changes we have detailed in this first-year progress report may appear small to the outside observer. Indeed, many of the changes (i.e., teachers developing curriculum or leading staff development programs) may appear to those outside of education to be common sense modifications rather than revolutionary alterations.

But change in school districts is slow to come. Progress is most often achieved in measured increments rather than in startling breakthroughs. We believe the Trust Agreement Project embodies the "process of building momentum by accumulating a small series of successes" (Peters and Waterman 1982). We look forward to the opporutnity to continue to build on these small successes.

Appendix

1987 Trust Agreement Project Participants

Lompoc Unified School District

Ed Albright, Principal, Lompoc High School
Barbara Bolton, Elementary Teacher
James Brown, Superintendent
Robert Campbell, Member, Board of Education
John Guiffre, President-elect, Lompoc Federation of Teachers
Cee Frank Hauser, Member, Board of Education
Phil Hirschler, High School Teacher
Charles Knowles, Member, Board of Education
Bobby Kusulas, Elementary Teacher
John Lemon, Principal, Lompoc Valley Middle School
Tom Love, Director, Curriculum and Program Development
Alice Milligan, Associate Superintendent, Personnel/Business Services
Pat Peterson, Elementary Teacher
Joseph Rudnicki, Director, Certificated Personnel
Pete Saraz, President, Lompoc Federation of Teachers
Jerry Schockmel, Principal, La Canada Elementary School
Connie Steffen, Member, Board of Education
Steve Straight, President, Board of Education
B.R. "Bill" Williams, Associate Superintendent, Educational Services

Newport-Mesa Unified School District

Carol Berg, Assistant Superintendent, Personnel Services
David Brees, Secondary Vice President, Newport-Mesa Federation of Teachers
Jim de Boom, President, Board of Education
Jan Fisher, Trust Agreement Coordinator
Judith Franco, Member, Board of Education
Sherry Loofbaurrow, Member, Board of Education
Roderick MacMillan, Member, Board of Education
John Nicoll, Superintendent
Phyllis Pipes, President, Newport-Mesa Federation of Teachers
Kenneth Wayman, Member, Board of Education
Forrest Werner, Member, Board of Education
Tom Williams, Member, Board of Education

Petaluma Schools

Alan Andres, Member, Board of Education
John Braito, President, Petaluma Federation of Teachers
Charles Cadman, Superintendent
Richard Clecak, Principal, Kenilworth Junior High
Mary Collins, Director, Elementary Education
Shirley Collins, Elementary Vice President, Petaluma Federation of Teachers
Wesley Ebert, Member, Board of Education
Barbara Granicher, Assistant Principal, Petaluma High School
Jon Harford, Negotiating Team, Petaluma Federation of Teachers
Matthew Hudson, President, Board of Education
Jeanne Jusaitis, Teacher
Sharon Karrick, Principal, Petaluma Junior High
Jerry Klor, Director, Special Services
Elizabeth Marquardt, Member, Board of Education
Joann Scott, Member, Board of Education
Georgia Squires, Chief Negotiator, Petaluma Federation of Teachers

Poway Unified School District

Romeo Camozzi, Jr., Assistant Superintendent, Instruction
William Crawford, President, Poway Federation of Teachers
James Dyer, Immediate Past President, Poway Federation of Teachers
Chris Evans, Supervising Teacher
Adelito Gale, Member, Board of Education
Sondra Kapp, Supervising Teacher
Robert Keithly, Member, Board of Education
L. Ned Kohler, Member, Board of Education
Charlotte Kutzner, Supervising Teacher
Terri McNaul, Teacher and Member of Project Governing Board
Sharon Purviance, Member, Board of Education
Don Raczka, Project Coordinator
Robert Reeves, Superintendent
Thomas Robinson, Assistant Superintendent, Personnel
Stan Rodkin, President, Board of Education
Veleta Rollins, Supervising Teacher

San Francisco Unified School District

Mary Ann Ahtye, Staff, San Francisco Federation of Teachers
Rosario Anaya, Member, Board of Education
Linda Carter, Teacher, Claire Lilienthal Elementary School
Ramon Cortines, Superintendent
Linda Davis, Deputy Superintendent, Division of Instruction
Libby Denebeim, Member, Board of Education
Rudi Faltus, Coordinator, Paraprofessional Career Program
Peggy Gash, Chair, Paraprofessional Chapter, San Francisco Federation of Teachers
Joy Jasko, Teacher, Claire Lilienthal Elementary School
Kathleen King, Principal, Claire Lilienthal Elementary School
Myra Kopf, Member, Board of Education
Roderick McLeod, Member, Board of Education
Marney Miles, Teacher, Claire Lilienthal Elementary School
Joanne Miller, Member, Board of Education
Hilary Poon, Teacher, Claire Lilienthal Elementary School
Barbara Render, Supervisor, Personnel Services
Nancy Sequeira, Teacher, Claire Lilienthal Elementary School
Joan-Marie Shelley, President, San Francisco Federation of Teachers
Benjamin Tom, Member, Board of Education
Sodonia Wilson, President, Board of Education
Paula Zimmerman, Teacher, Claire Lilienthal Elementary School

Santa Cruz City Schools

Maryann Barry, Member, Board of Education
Bob Bosso, Member, Board of Education
Donna Cohick, Chief Negotiator, Santa Cruz Federation of Teachers
Dale Kinsley, Superintendent
Alberta Kline, Administrator, Personnel Services
Marty Krovetz, High School Principal
Jane Martin, Member, Board of Education
Don Maxwell, President, Santa Cruz Federation of Teachers
John Moore, Teacher
Roy Nelson, Elementary Principal
David Paine, Teacher
C. Art Pearl, President, Board of Education
Ellen Scott, Teacher
Marsha Speck, Assistant Superintendent, Instruction
Deborah Taylor, Member, Board of Education
Paul Thiltgen, Member, Board of Education
Barbara Thompson, Member, Board of Education

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