



Leading the Way: AFT-WV Advances School Safety Measures

Introduction

The American Federation of Teachers-West Virginia (AFT-WV) passed safe schools legislation in March 2008. To better understand how AFT-WV influenced the creation and eventual passage of safe schools legislation, we conducted a case study examining the event and the circumstances surrounding it.¹ In particular, we were interested in the strategies AFT-WV employed to ensure successful passage of the legislation.

We chose a single-case study design² to learn about AFT-WV's role in the passage of the legislation. At the national and state levels, we collected archival records and policy documents. To capture divergent perspectives, we conducted open-ended, semi-structured interviews with key informants at the national, state and local levels (e.g., state legislators and national, state and local union representatives) using parallel questions for different groups of participants. All interviews were recorded and transcribed.

This report is divided into two main sections. In the first section, we present the overall key findings that emerged from the study. The second section provides a detailed description of the case study along with additional insights about the organizing and professional role of unions.

Key Findings

The following key findings emerged from the study.

- The AFT-WV employed a variety of strategies in drafting the legislation and ensuring its passage. These strategies had multiple purposes and were targeted at different stakeholders. For example, surveys conducted by AFT-WV of teachers, school service personnel and the public demonstrated broad support for addressing school safety. The survey was used to develop and mobilize knowledge as well as to garner political, community and member support.
- Coalition building achieved two goals. First, it helped create a unified front of teachers and school service personnel that bolstered support for the bill in the legislature. Second, coalition building was an important organizing tool that resulted in the affiliation of the West Virginia School Service Personnel Association (WVSSPA) with AFT-WV making them the largest employee education group in the state as well as the largest labor group.
- Strong union leadership at the state level was key to the passage of the legislation. AFT-WV leaders have a strong sense of organizational purpose; implicit in that is the belief that being a major policy player at the state level is a priority.
- Establishing and maintaining professional relationships with a variety of education stakeholders (including key policymakers and labor leaders) is important in advancing legislation. Strong relationships allow for open channels of communication and can engender trust between union leaders and policymakers.

- AFT-WV leveraged organizational capacity by utilizing the resources available from the American Federation of Teachers (AFT). The resources and expertise available at the national level allowed AFT-WV to access relevant research and information, increase mobilization efforts and improve the organization's public visibility.
- There is an essential nexus among organizing, mobilization and professional issues. Professional issues can be used to mobilize members internally, to strengthen the union and advocate for a school reform agenda to improve schools.

Case Study of the American Federation of Teachers-West Virginia

The West Virginia Legislature passed safe schools legislation in 1995 and 2008. In both years, school safety legislation got statewide support thanks to the work of American Federation of Teachers-West Virginia (AFT-WV). In a state that lacks collective bargaining rights, the AFT-WV employed a variety of strategies aimed at both persuading and coalescing different stakeholder groups around the issue of school safety.

On March 11, 1995, West Virginia passed the *Productive and Safe Schools Act* (H.B. 2073).³ AFT-WV championed this legislation along with a coalition of legislators as well as the West Virginia Department of Education, Parent Teacher Association/Parent Teacher Organization, and law enforcement and business groups. The legislation had a number of parts including oversight in the form of county improvement councils; local school improvement councils (LSICs); authority for teachers and bus drivers to exclude students; and more responsibility for principals who suspend or expel students.

On March 6, 2008, at the urging of a coalition between the AFT-WV and the West Virginia School Service Personnel Association (WVSSPA), West Virginia passed House Bill 4368 (H.B. 4368).⁴ This law makes changes to the original 1995 school safety law. The most significant change in the latest school safety law is that teachers and school personnel now oversee how the administration handles discipline by drafting and issuing an annual public report. It also adds a bus driver to the council and adds new attendance and participation rules. Another distinguishing feature of the law is the Bill of Rights and Responsibili-

ties for Students and School Personnel, which codifies expectations for conduct.

The purpose of this case study is to describe the role the union played in the passage of statewide school safety legislation and the aggressive *Discipline without Delay* campaign the union waged. We review the actions taken by the union including how the AFT-WV engendered support through coalition building as well as other specific strategies to better understand how the union helped pass the legislation. Lessons learned from AFT-WV's experience can be useful to other local and state federation presidents who want to better understand how the union can be an effective political player and advance education legislation that is important to its members. While leaders in collective bargaining states may be skeptical of the relevance of this case study to their situations, we argue that "collective bargaining is not a reliable alternative to a place at the policy table."⁵

Strategies Employed by AFT-WV

AFT-WV used a variety of strategies to ensure the passage of H.B. 4368. These strategies were employed at different times during the *Discipline without Delay* campaign and targeted different stakeholders. We address these strategies in four broad categories: (1) political action; (2) garnering external support; (3) developing and mobilizing knowledge and building member support;⁶ and (4) leveraging capacity.

Political Action

AFT-WV was heavily involved in political action up to and during the passage of H.B. 4368. Successful passage hinged on the ability of AFT-WV to establish relationships with political leaders and gain political support. Building political will for the safe schools legislation was a multi-year effort that began with the need for sympathetic leadership in the chambers of the state legislature.

In 2006, the West Virginia speaker of the house in the state legislature decided after several terms of office that he was not going to run for reelection. The AFL-CIO in West Virginia took notice of this opportunity and, consequently, AFT-WV was part of a number of early meetings to plan a strategy for the hotly contested speaker position. AFT-WV saw that they could be involved and during their own endorsement process, AFT-WV strategically endorsed supporters of Rick Thompson—a labor friendly candidate—for the speaker's race. Thompson eventually won the

caucus vote and became speaker of the house thanks in large part to the political support of the AFL-CIO local labor councils and the AFT-WV's political support for Thompson's candidacy. Today the AFT-WV enjoys a very close working relationship with Thompson as well as the majority leader and the majority whip in the state legislature.

These working relationships have created open channels for communication. These channels proved crucial in building support for the safe schools legislation. Prior to the introduction of H.B. 4368, AFT-WV had conversations with house leaders. "We started talking with the leadership team in both the house and senate well before the legislative session started and we let them know what we were coming with," said Josh Sword, AFT-WV Political Organizer. West Virginia Delegate Brady Paxton, who serves on the education committee, spoke about the relationship he has with AFT-WV. "I don't hesitate to call on them for assistance or their opinion...and they feel the same way about us."

The importance of good working relationships was particularly evident when the safe schools bill was introduced in committee in the house of delegates. In its original form, H.B. 4683 sought to address discipline by creating a new oversight committee expressly for disciplinary issues. This oversight committee would have excluded principals, and several principals who serve on the house education committee opposed these provisions. Aware of the need to address school safety, and the push from AFT-WV, Mary Poling, chair of the education committee in the house of delegates, described how she acted to rescue the school safety bill in committee. "[I]t was clear that there were so many questions during the first committee meeting that if a vote had been called it could have killed the bill So, I assigned the bill to a committee chaired by a principal and asked him to see that it did not die. We talked immediately about changing the one concept that was most controversial," Poling said. The controversy was resolved when the subcommittee adopted a provision that would assign discipline oversight to the existing LSICs.

Beyond good working relationships with key state legislators, AFT-WV gained broad political support for the safe schools legislation in other significant ways. AFT-WV built political support through the strategic release of two surveys—one of the public and one of AFT-WV and WVSSPA members. AFT-WV released the surveys

publicly in advance of the legislative session. The surveys demonstrated to the legislature that the public, teachers and school service personnel were largely in sync on school safety and discipline issues. The survey results were an invaluable tool for building consensus in the state legislature.

AFT-WV gained further political support by holding a rally on the eve of the state-of-the-state address by the governor. Each year the address opens the legislative session which does not typically attract rallies. AFT-WV and WVSSPA arranged to hold a rally in support of their three crucial issues: wages, pensions and school safety. They met with the governor and state superintendent of schools prior to the rally to let them know AFT-WV's intent—to hold a rally and have it be very positive. Bob Brown, WVSSPA Executive Director, described the event. "[W]e had a joint rally at the capitol. Now, it wasn't a protest... [W]e took fifteen to eighteen hundred folks with signs and T-shirts, and rather than protesting we cheered the legislators on." He added, "All the news media picked up on it—this quiet, sort of honorable protest or rally."

Garnering External Support

Beyond getting political support, AFT-WV took several measures to ensure that their safe schools campaign would be supported by the public as well as policymakers. By building a coalition and waging a public relations campaign, AFT-WV garnered external support for the safe schools legislation initiative.

Building a Coalition

The role of coalition building was crucial in the original passage of the 1995 school safety legislation and again in 2008 when the 1995 law was revamped. For AFT-WV, building a coalition of supporters to address a professional issue like school safety was a top priority. In a noncollective bargaining state like West Virginia, influencing and ultimately passing legislation is not an easy task. AFT-WV has acted twice to pass legislation that addressed school safety, and at both times, the legislation passed because AFT-WV formed coalitions. In 1995, AFT-WV formed a broad coalition. In 2008 the AFT-WV built on the relationships that persisted from the broad coalition formed in 1995 and added a powerful ally in the West Virginia Schools Service Personnel Association.

In 1995 the catalysts for building a coalition were two surveys that showed overwhelming support

for school safety—one of the public and one of AFT-WV teachers. AFT-WV made the results public and the media coverage helped AFT-WV galvanize support for an issue that was as AFT-WV president Judy Hale says, “all new to people” at the time. AFT-WV organized a broad coalition of legislators, business and community interests, parent-teacher organizations, the state department of education, and law enforcement.

When AFT-WV began to act on school safety again in 2007, it did so after years of mounting evidence of lax oversight of the 1995 law. The initial idea for improving the 1995 law originated at an AFT-WV weekend retreat that included teachers and several invited guests from the WVSSPA. AFT-WV began its campaign as it did before—with the release of two surveys—one of the public and one of the teachers and service personnel.

In 2007 and 2008, AFT-WV worked primarily in coalition with the 8,500-member WVSSPA. This time, AFT-WV chose to intensely focus on building a coalition with WVSSPA rather than forming a broad coalition as it had done previously. By working together, AFT-WV and WVSSPA would not only achieve their goal of addressing the weaknesses of the 1995 law, but would achieve one voice. “One of the major elements was to show the school support staff, this independent organization, the power of working together with the teachers,” said Bob Brown.

By speaking with “one voice” the coalition convinced the public and ultimately the legislature to support and pass H.B. 4683 in March 2008. The relationship brought the AFT-WV and WVSSPA so close that they announced an affiliation plan in August 2008, creating the largest employee education group in the state.

Public Relations Campaign

As part of a public relations campaign, AFT-WV publicized the results of both its member surveys of teachers and school service personnel as well as the public opinion poll it conducted. Several news articles and editorials appeared in local media between January 2007 and February 2008 apprising the public of AFT-WV’s agenda to pursue legislation regarding school discipline, safety concerns of both the public and school staff and the instructional time lost because of disruptive students in the classroom. In an effort to provide a unified front to the public, president of the AFT-WV, Judy Hale and president of the WVSSPA, Jackee Long wrote an edito-

rial for the Charleston Gazette on Sept. 12, 2007, providing evidence of the need for stronger safe schools legislation and urging each of the state’s 55 county school boards and superintendents to support their effort to strengthen the legislation.

As previously described, AFT-WV and WVSSPA held a rally on the eve of the legislative session. The rally was televised and the public saw a united group of teachers and school service personnel petitioning lawmakers as they arrived. AFT-WV also solicited the assistance of the American Federation of Teachers (AFT) with their public relations campaign.

Developing and Mobilizing Knowledge and Building Member Support

One of the primary ways AFT-WV developed and mobilized knowledge about the issue of school safety was by conducting research in the form of surveys. AFT-WV conducts an annual member survey every year to identify issues that are most pressing to teachers. The issue of school safety and discipline had become a priority over recent years for AFT-WV’s members. AFT-WV then decided to conduct member surveys of teachers and school service personnel in addition to conducting public opinion polls specifically on school safety and discipline. AFT-WV then published the results of these two surveys as part of their *Discipline Without Delay* campaign. They highlighted several survey results to produce the following key findings:

- The public and school employees are in sync about discipline;
- Discipline problems are robbing schools of instructional time;
- There is strong concern about bullying;
- Some students intimidate teachers and staff;
- The public and school employees believe there is unfinished business; and
- School employees see benefits from having a real voice.⁷

In addition, union leadership visited several county boards of education and local leaders throughout the state “to build interest at the local level for the legislation.” These efforts helped AFT-WV mobilize knowledge by informing their members and the public about the current condition of schools as well as build member support by legitimizing the legislative action they

wanted to take. It was important that union leaders' actions were in sync with members' needs. As Carrena Rouse, local union president of Boone County, explained, "There are many items that we address in our legislative retreats, and summer school and our convention but when we looked at it, and we looked at what was the most pressing need that we saw in our classrooms, over and over, the teachers were saying something has to be done about discipline."

Leveraging Capacity: Drawing on the AFT Resources

AFT-WV leveraged their organizational capacity with the resources available through the national organization, AFT. By tapping into the rich resources and expertise at the national level, AFT-WV was able to access relevant research and information, increase mobilization efforts and improve the organization's public visibility.

Specifically, leaders at AFT-WV sought out the national organization to:

- assist with the funding and design of a public opinion poll and survey of teachers and service personnel;
- provide expertise (such as a full-time PR person), equipment (such as video production equipment) and materials (such as "ready-made editorials") for running a public relations campaign about the school safety issue and the proposed legislation;
- mobilize members through GetActive; and
- organize training for building reps about the legislation.

Judy Hale explained how AFT-WV frequently taps into the resources of the national organization to leverage the capacity of AFT-WV:

In terms of training local leaders, in terms of PR, how to do interviews, the research that's available, the resolutions that come out of [the AFT], those kinds of things are invaluable because those are the kind of "shake-and-bake" things—you can tailor to your state.

Additional Lessons Learned

Several additional lessons were learned from this case study including the importance of leadership, the relationship among organizing, mobilization and professional issues and the ways in which the union can achieve power.

Strong Leadership Is Key

Strong union leadership at the state level was crucial to the passage of the legislation. Leaders at the AFT-WV had been with the union during the passage of the 1995 legislation, and these leaders had a deep understanding of the law and the problems associated with it. In addition, the state union leaders had long-standing relationships with previous coalition members and were trusted by these groups. As Josh Sword pointed out, "[W]hen the AFT and the service personnel wanted to add onto the '95 legislation, it didn't raise any flags. It just didn't. The relationship with all the groups has been strong enough that it just wasn't going to happen." Interviews with union leaders also revealed that they had a strong sense of organizational purpose and that being a major policy player at the state level is a priority.

The Nexus among Organizing, Mobilization and Professional Issues

The *Discipline without Delay* campaign in West Virginia illustrates the nexus that exists among organizing, mobilization and professional issues. In a noncollective bargaining state, teachers want their union to advocate for educational issues that directly affect their profession outside of the traditional issues of salary and pension. Kathy Buzad, AFT's assistant director of educational issues contends, "I think it's an essential nexus that unions who are really able to advance agendas recognize and have recognized that advocating for educational issues is another source of power." And AFT's senior associate director of organization and field services, Matt Jacob agrees that "you can't really do professional issues without organizing; you can't really organize without professional issues. The two are seamless."

In places with collective bargaining agreements, professional issues can be used to mobilize members internally, to strengthen the union and advocate a school reform agenda to improve the schools. As Matt Jacob attests, in local schools where there is union activity, "there's advocacy, there are issues that are really being talked about" by members. Strong local unions usually have active and effective building representatives. Often these building representatives became more active in their union because a professional issue affected their classroom or school directly. Matt Jacob describes the way in which many union members become building representatives:

If you ask most AFT building reps how did you become an AFT building rep, more often than not, what they tell us is, 'Well, there was this issue at our school and you know, nothing was getting done. And so I turned to the union, and I asked them if they could help. They talked to me, and we started working together, and we were really able to deal with that... [Later on] they asked me to be the building rep.

West Virginia demonstrates the power of organizing around a professional issue for both non-collective and collective bargaining states. AFT-WV addresses professional issues in a variety of ways. The state executive board meets monthly and annually, and union leaders from all over the state have an opportunity to discuss current and relevant professional issues of their membership. AFT-WV also holds an annual legislative retreat where leaders from all over the state (local presidents, officers, advisory councils, etc.) set a legislative agenda; this is yet another opportunity to find ways to address professional issues through legislation. Two additional venues where members learn about and discuss professional issues are AFT-WV's annual "summer school," a union-sponsored professional development conference (also known as "ER&D or educational research and dissemination" at AFT), and the AFT-WV convention.

While the professional issue of school safety resonates with most teachers and school service personnel, it also provided the catalyst for the eventual affiliation of AFT-WV and WVSSPA. Fred Albert, local union president of Kanawha County, stated that the *Discipline without Delay* campaign has been a "strong organizing tool" and has shown that the union is "doing all that we can at the local and state level to make things better for everyone, for teachers, for cooks, for custodians, for bus drivers and for students." Carrena Rouse also added, "Our members—to stay members—need to see that the union has a role in their life that's beneficial."

As schools begin to implement the new law, additional opportunities for union activism will naturally arise. Teachers and school service personnel will be elected by their peers to their LSICs to serve in school leadership positions. Most likely, those elected to the LSICs want to be involved because they understand the potential impact of an issue like school safety. The hope is that the additional oversight responsibility the LSICs will have will help identify new activists as

well as show how the union can positively touch the lives of its members.

Empowering Teachers and School Service Personnel; Empowering the Union

Interviewees also spoke of the potential of this legislation to give teachers and school service personnel more control over how schools work as well as the conditions under which school staff work through the establishment of administrative oversight by the LSICs. As teachers unions transition from traditional trade unions to professional unions, if they are to truly affect the profession, "they must enable teachers to take on roles previously left to district administrators [such as] determining schoolwide policies and practices and ensuring the quality of the teaching force in their local schools."⁸ This legislation has the potential to do so through a new role for the LSICs.

Local School Improvement Councils (LSIC)

The current composition of the council includes a variety of education stakeholders including teachers and school service personnel (including one bus operator). Further, most of the council members must be elected by their peers and not appointed by the principal.

The most significant change to the legislation is an oversight responsibility for teachers and school personnel of administration regarding how student discipline is handled. Each LSIC prepares a report to the county superintendent that grades the "fairness and consistency of the disciplinary actions at the school."⁹ In preparing the report, LSICs should:

- collect information such as copies of the written certification forms that each principal is required to provide;
- survey school employees on their perceptions of how well discipline policy is being enforced; and
- review the school's discipline code.

Should the LSIC's report raise concerns about discipline, the new law brings more accountability and transparency to discipline issues. For example, the county superintendent is required to respond in writing to the LSIC within 10 days, and each county school board must retain and file all reports so that the public can review it.

One final component of LSICs is the requirement to hold an annual meeting with parents,

students, school employees and other interested parties to engage in “positive and interactive dialogue regarding effective discipline policies.”¹⁰ The new role for the LSICs can empower teachers by giving them a voice in the decision-making process over the way in which discipline is handled at their schools. As Judy Hale asserted, “the LSICs can become a powerful voice and the teachers on the LSIC will be empowered to assess the discipline of that school.” Rosemary Jenkins, director of field services for AFT-WV (who also wears the hat of state educational issues coordinator) agreed and added that teachers “have never had power like that before.” The ability of teachers and school staff to have a say over their working environment will largely depend, however, on the implementation of the law as discussed in the following section.

Next Steps for AFT-WV: ‘Bringing the Language to Life’

In order for the law’s potential to be reached, AFT-WV must play an advisory role and make sure members know about the provisions of the law. LSICs have been in place in schools for quite some time, and teachers report that principals have been appointing members to the council rather than making sure they are elected by their peers as was designated in the original 1995 legislation. AFT-WV believes that they need to make sure that teachers and school personnel understand both the new role of the LSIC as well as its composition in order for the law to “have teeth.” As Rosemary Jenkins stated, “[The law is] not going to be worth a dime unless we get the word out effectively, and we mobilize our members and get everyone trained.” Consequently, AFT-WV began several initiatives geared at educating members about the law including:

- creating a Discipline Without Delay toolkit for staff and local leaders;
- conducting summer institutes;
- making presentations to faculty senates and LSICs, members at legislative retreats and local union meetings;
- corresponding with members via e-mail, phone calls, newsletters, Web sites;
- writing opinion-editorials in local newspapers; and
- submitting school board resolutions about the safe schools legislation.

AFT-WV contends that these measures will “bring the language of the law to life” and positively affect the environment where teachers and school staff work.

Endnotes

¹ Principal investigators for this research study were Angela Minnici, Ph.D., Associate Director, Educational Issues and Justin Stone, Associate, Educational Issues.

² Yin, R. K. (2003). *Case study research: Design and methods*. Thousand Oaks, CA: Sage Publications, Inc.

³ H.B. 2073, 72d Legislature, (1995) (enrolled).

⁴ H.B. 4368, 78th Legislature, (2008) (enrolled).

⁵ Poole, W. L. (1999). Teachers’ union involvement in educational policy making: Issues raised by an in-depth case. *Educational Policy*, 13(5), 698-725.

⁶ The first 3 categories draw on the work of Poole’s (1999) study on the techniques employed by a North American teachers union to influence policy-making.

⁷ AFT-WV. (2008, January 18) “Discipline Without Delay: Key Findings and Recommendations.” Charleston, WV: author.

⁸ Kerchner, C. T., Koppich, J. E., & Weeres, J. G. (1998). *Taking charge of quality: How teachers and unions can revitalize schools*. San Francisco, CA: Jossey-Bass Publishers.

⁹ H.B. 4368, 2008, §18-5A-2(l)(2)(B)

¹⁰ H.B. 4368, 2008, §



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