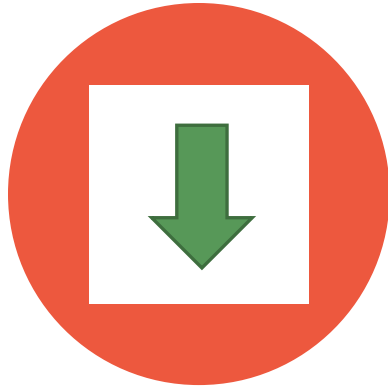


Follow the Leader

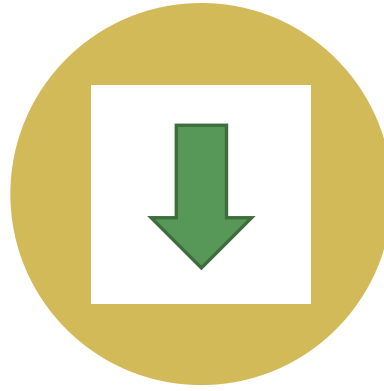
JOAN DEEM, RSD

NYSUT TARRYTOWN REGIONAL OFFICE

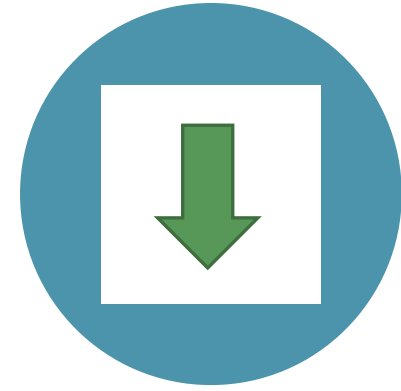
Succession Planning Objectives



IDENTIFY RISK FACTORS IN YOUR ORGANIZATION THAT MAKE PLANNING FOR THE FUTURE UNCERTAIN.



ESTABLISH AN INTERNAL ORGANIZING PLAN FOR MEMBERSHIP ASSESSMENT IDENTIFYING POTENTIAL LEADERS



CREATE THE CAPACITY TO BUILD AND MAINTAIN RELATIONSHIPS IN ORDER TO NURTURE EFFECTIVE LEADERS

Your Leadership Journey

Typical Common Themes

No one else would step up

Frustration with existing leadership

I was asked

I was told!

Your Local's Leadership Structure?

President

Vice President(s)

Secretary/Treasurer

NYSUT/AFT Delegates

Rep Council

Risk Factors

Are there any vacancies or holes in leadership?

Are there positions that are routinely difficult to fill?

Are roles too big for one person?

Do the same people run for positions year after year?

Do you have too many cooks in the kitchen, and nothing gets done?

Do you do everything yourself even though you have people in positions?

Do you anticipate retirements or resignations in the next year or two?

Causes of Apathy

Fear of management

Economic insecurity,
fear of losing job

Feeling isolated,
powerless or hopeless
about making positive
change

Confusion, don't know
what's happening

Lack of Knowledge,
don't know your rights

Feeling cynical
because of bad
experiences in the
past

Feeling individualistic.
"I don't need anybody
else"

Feeling inferior or
divided due to racism,
sexism, misogyny, or a
lack of professionalism

Family or personal
problems, illness, lack
of transportation or
childcare

Other objections, "my
parents, my partner or
my religious affiliation
object"

As individuals, active union members can either help overcome membership apathy, or make it worse...

DON'T...

...blame the membership for the problem.
Members will pick up on your attitude and it only makes it worse.

...take a management attitude.
If members feel you look down on them, their apathy will increase

...expect people to break the habit of apathy overnight.
We can't expect them to go from little or no involvement to running for office overnight.

...think the problem of union apathy can't be solved.
That's what management wants us to think!

DO...

...blame the management for membership apathy.
Management works hard to encourage it.

...treat your membership as equals and with respect.
We get involved because our activity gives us things management often denies us at work-autonomy, equality and respect.

...increase the membership's involvement step by step.
It takes time to develop a habit of union involvement. Our job is to discover what people can handle and then to slowly increase their commitment and activity.

Membership Assessment

THE WHO, WHAT, WHERE, WHY & HOW OF GETTING TO KNOW
YOUR MEMBERS.

The Membership Who, What, and Where

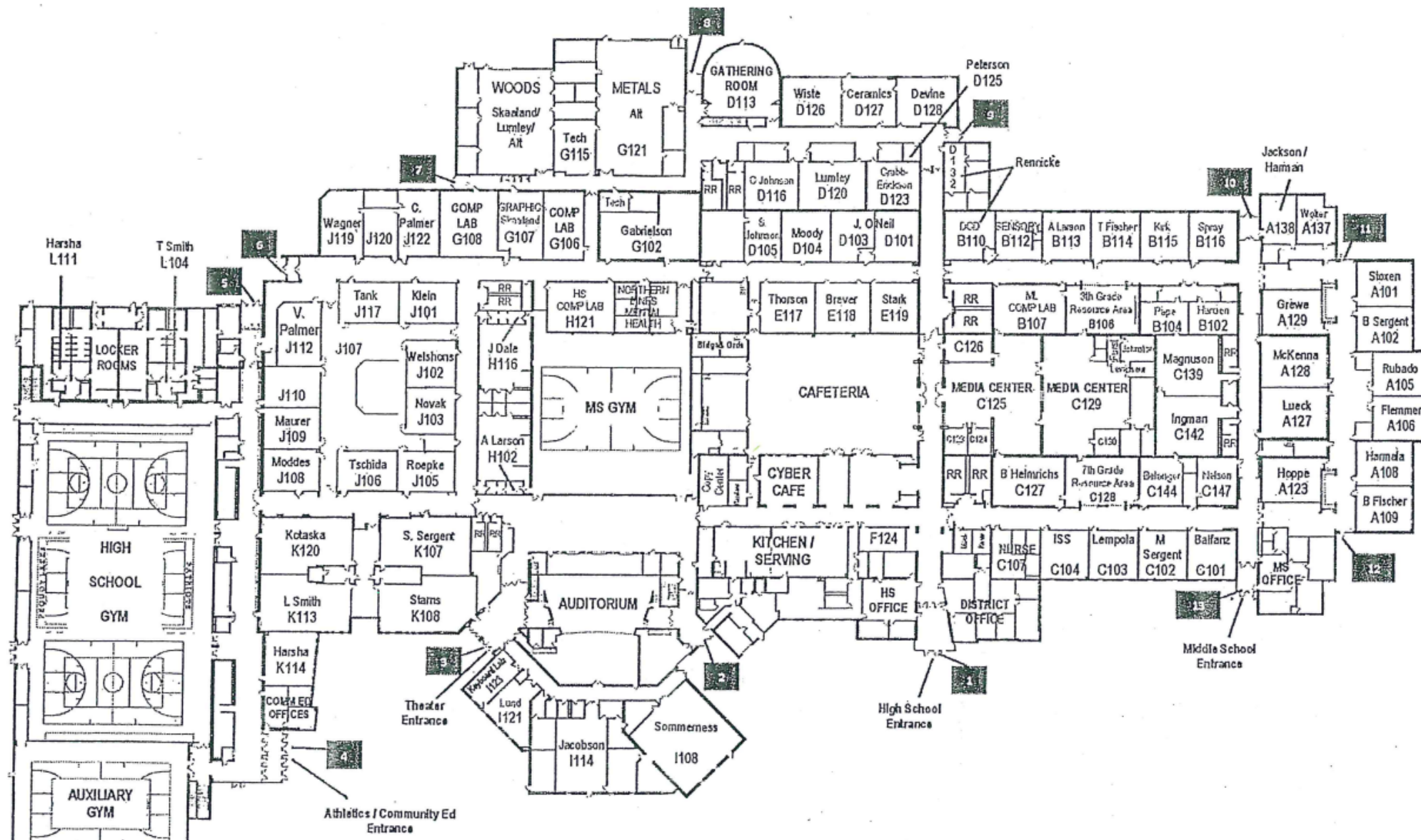
Create and maintain an accurate database of your members

Make sure the information in your database is RELEVANT

Be certain to keep this information secure

- Basic information: Name, home mailing address, worksite, work title, cell number
- Union information: attendance at meetings, Vote Cope contributions, participation at activities, grievance concerns, t-shirt size, member's skills to capitalize on

1,2,3,4, RATING	Room	Department	First Name	Last Name	Years	Union Office	Attends Union Meetings	Notes	VOTE COPE \$	
	A101	MS Social Studies	Alice	Stoxen	11		Always	Single mother of 3	\$ 100.00	
	A102	MS Social Studies	Bobby	Sergent	2		Never	Son of Sally Sergent coaches girls track	\$ -	
	A105	MS Social Studies	Anthony	Rubado	3		Sometimes	Worried about tenure, had an affair with married Assistant Principal	\$ 50.00	
	A106	MS ELA	Dina	Flenner	27		Always	Best friends with talia Fischer	\$ 20.00	
	A108	MS ELA	Chris	Harmala	1		Never	Recently moved to area from Wisconsin	\$ -	
	A109	MS ELA	Barbara	Fischer	1		Never	Daughter of Talia Fischer	\$ -	
	A123	MS ELA	Lorelei	Hoppe	24		Never	Exceeded 3 times over career	\$ 20.00	
	A127	MS Science	Jimmy	Lueck	8		Sometimes	Football coach and son of BOE President who is anti-union	\$ -	
	A128	MS Science	Noreen	McKenna	12		Sometimes	Mother retired from District 6 years ago, was a building rep	\$ 20.00	
	A129	MS Foreign Language	Jackie	Grewe	7		Sometimes	Unahppy with current leadership but comes from a union background	\$ 10.00	
	A137	MS Social Studies	Gina	Woker	18		Sometimes	Chair of the local Soccer League Board. Lives in the community	\$ 25.00	
	A138	MS Gifted Program CO	Stephanie	Harman	6	Building Rep	Always	Daughter of a BOE member/ Goes to church w Cora Balfanz won election	\$ 100.00	
	A138	MS Gifted Program CO	John J	Jackson	14		Always	married to Union officer in another district	\$ 50.00	
	B102	MS Special Education	Hamid	Haroen	3		Sometimes	friends with Stephanie Harman	\$ 25.00	
	B104	MS Special Education	Sheila	Pape	9		Sometimes	Dating Ted Rennicke	\$ 50.00	
	B110	MS Computer/Tech	Ted	Rennicke	7		Always	Dating Sheila Pape	\$ 100.00	
	B113	MS Foreign Language	Adam	Larson	4	Building Rep	Always	Married to Andrew Larson	\$ 250.00	
	B114	MS Foreign Language	Talia	Fischer	29		Always	Former Buiding Rep, lost election	\$ 50.00	
	B115	MS Foreign Language	Sun	Kirk	1		Never	Here on HB1 Visa teaching Mandarin	\$ -	
	B116	MS Health	Sandy	Spray	6	Secretary	Always	Recently won contested election/rabble rouser	\$ 150.00	
	C101	MS Math	Cora	Balfanz	7		Always	Goes to church with Stephanie Harman	\$ 100.00	
	C102	MS Math	Missy	Sergent	1		Never	Daughter of Sally Sergent/ directs school plays	\$ -	
	C103	MS Math	Gudalupe	Lempola	22		Never	Adjunct college professor at community college	\$ 20.00	



The Why, and How of Assessments.

Assessing your membership gives you valuable information to understand where individuals stand on a particular issue and what their capacity to contribute might be.

Assessments are best done with one-one conversations by TRAINED union members and results should be used to inform decisions, not shared as fodder for gossip.

Best place to start is with an assessment of your members' attitudes toward your local union

Membership Mapping Instrument

Leader Very active Frames issues Union activist Takes initiative 1	Strong follower/Potential leader Active Supportive of issues Strongly pro-union member Usually will do if asked 2
Follower Sometimes active Sometimes supportive of issues Passive union member Will do if arm is twisted 3	Won't follow Not Active Not supportive of issues Non-member or consistently antagonistic Will not do/participate 4

Identifying Potential Leaders

OR HOW TO TURN A 2 & 3 INTO A 1!

Views problems, mistakes or
difficulties as opportunities to learn.

Enjoys learning

Open to new ideas

Growth
Mindset

Situational Leadership

Supportive of others

Asks questions

Able to set goals

Leadership Courage

Thinks outside of the box and challenges the status quo

Stands up for convictions

Encourages people to express their point of view

Decisive

Takes personal responsibility for mistakes

Shares credit for success

NEVER retaliates

Small Group Discussion & Activity



Can you think of anyone who you previously considered for leadership that does not possess these qualities? (no names please!)

Can you think of 3 members who might possess the qualities of a having a growth mindset, situational leadership abilities and leadership courage?

Use the Natural Leaders Assessment Tool that to evaluate those 3 members you are thinking about.

Discuss with your small group and we will report out to the larger group.

Leadership Pipeline Development

“THE BEST MINUTE YOU SPEND IS THE ONE YOU INVEST IN
PEOPLE” - *KENNETH H. BLANCHARD*

Goals of a Union Education Program

- Develop or improve a communication plan
- Share the history and culture of the Local
- Convey the Union's goals and vision in a way that inspires members to action
- Communicate critical information to necessary parties in a timely manner
- Recognize and reward good work

You can work hard to find the “right people” but more important is the time you take to shape, mentor and figure out where they belong in your organization.

Avoid selecting people, just because they are your friends...many a friendship has been sacrificed this way.



Develop Relationships



Treat all interactions as opportunities to maintain and enhance relationships



Involve members in plans and decisions that impact them



Maintain confidence and self esteem of others



Inspire others to activate.



People thrive when they are part of a winning organization and can take pride in what they do



When people feel nurtured and supported in an environment where they are excited to continue learning and growing, they stay. That's a good thing!!



Union Mentorship

Pairing people together in order to build a stronger and more cohesive leadership team

- Helps the mentee grow and learn more quickly
- Gives the mentor an opportunity to share their skills
- Mentees should be constantly coached to help develop good habits in problem solving and creating a healthy union culture
- Creates stronger relationships with other members of the team

Developing for the Future

Cultivating the pipeline is to give people small opportunities to demonstrate their capabilities and readiness for growth

Pushing a great person into a role before they are ready sets them up to fail.

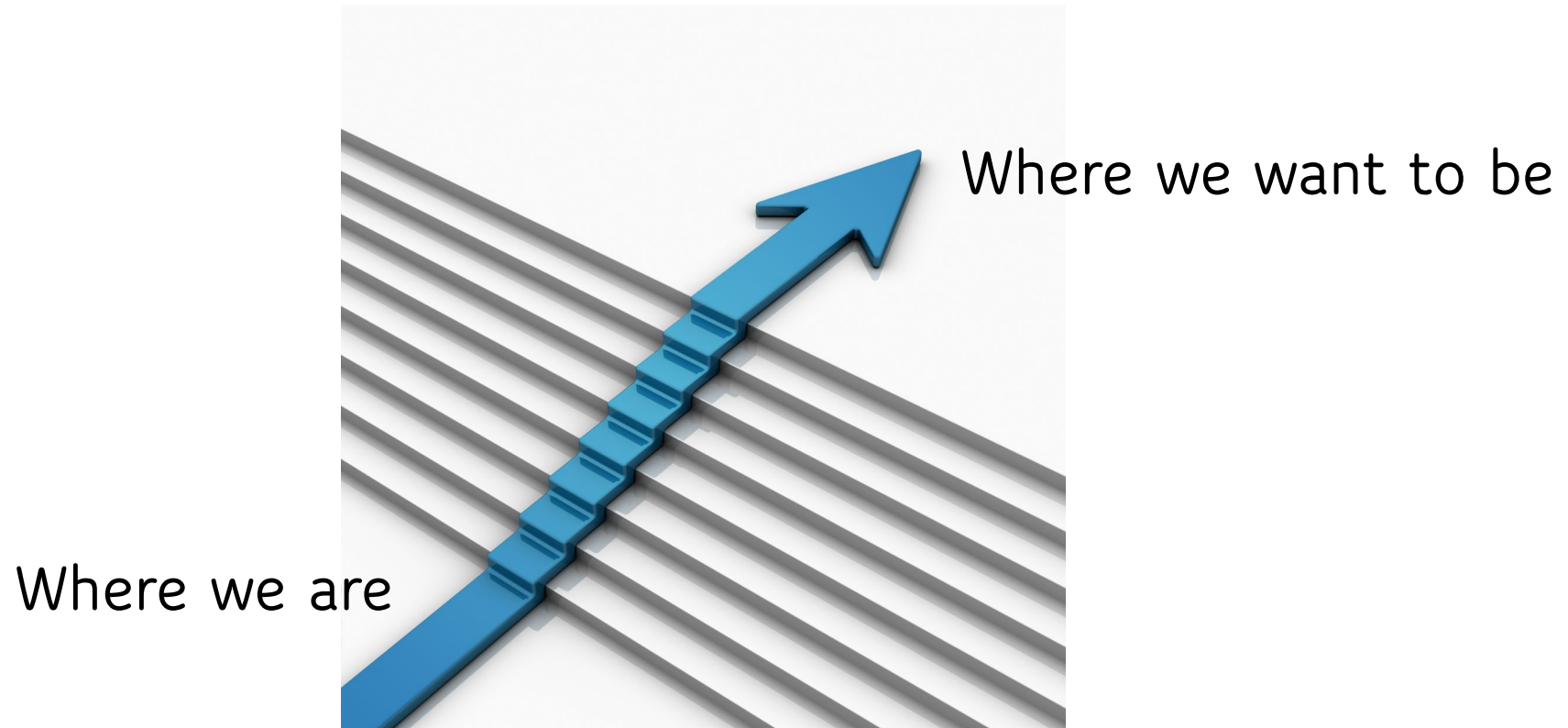
Paint a path forward for continued learning and development and identify training priorities

Back plan to ensure that there are enough qualified candidates in the pool at any given time.

Regularly conduct ongoing assessments to replenish the pool

Succession Planning

A problem is the gap between where we are today and where we want to be.

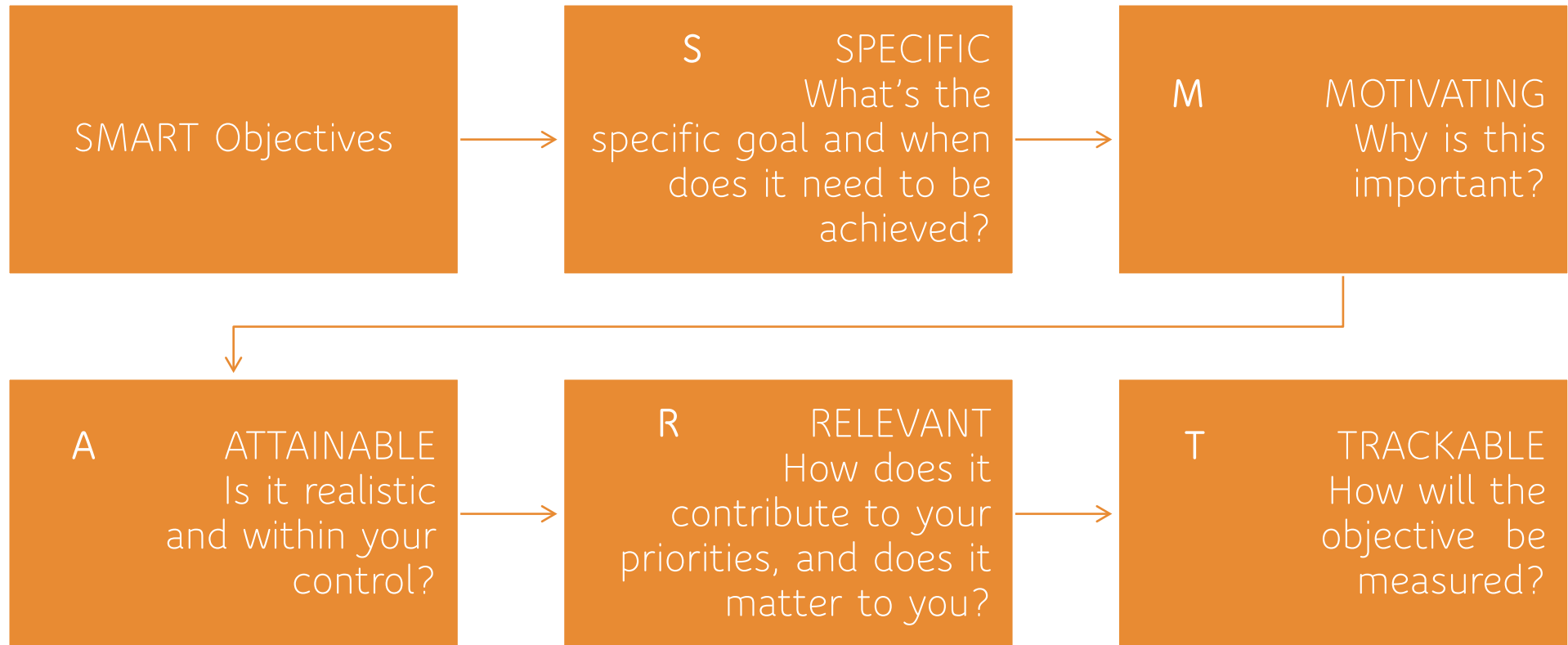


PRIORITY BOX

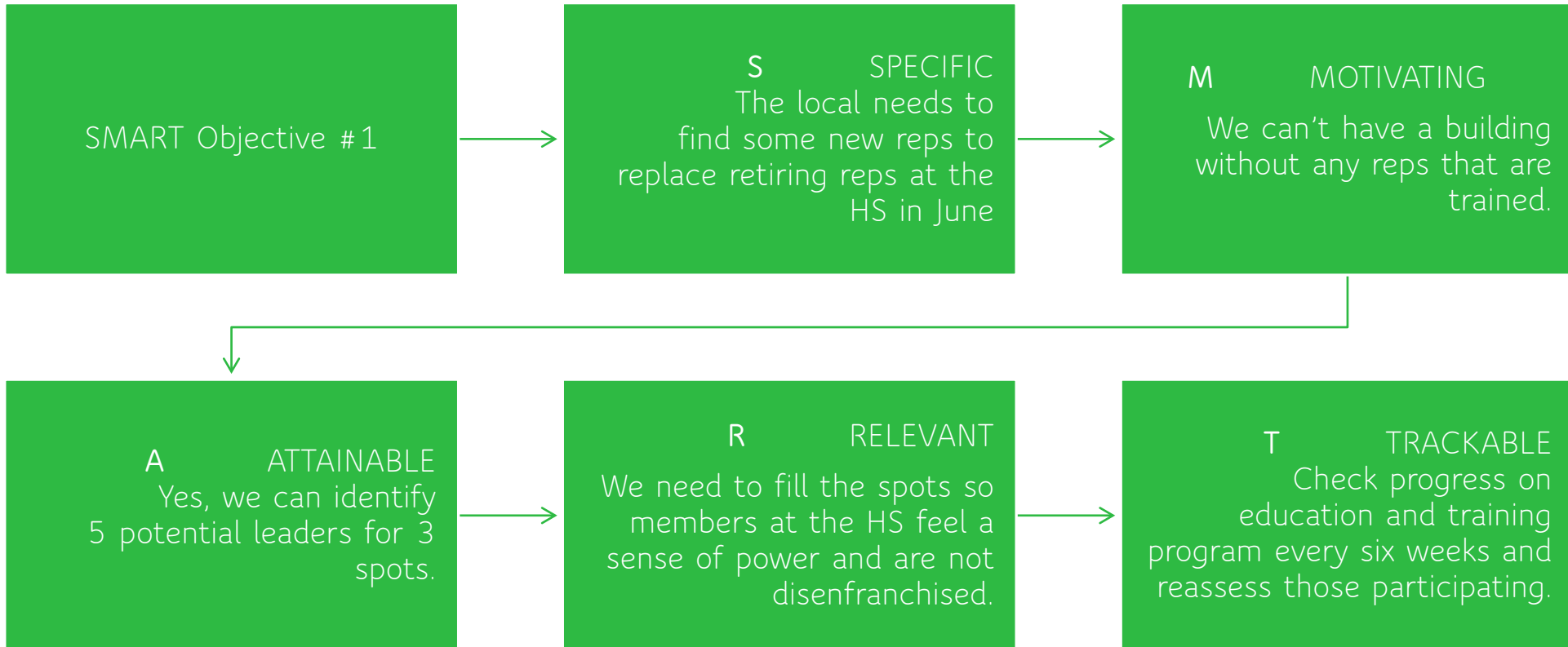


	MOST URGENT	LEAST URGENT
MOST IMPORTANT	DO <i>Do it now</i>	DECIDE <i>Schedule a time to do it</i>
LEAST IMPORTANT	DELEGATE <i>Who can do it for you?</i>	DELAY <i>Do it when there is time</i>

Identification of Succession Objectives



Succession Objective #1



Small Group Discussion & Activity



Brainstorm and using post it notes, write the problems or concerns you have for succession planning in your local

Try to use the existing concerns you have in your local so you can transform this into a real plan for your local.

Using the Priority Box Worksheet, organize your problems into DO, DECIDE, DELEGATE and DELAY

Use the SMART Objective worksheets to transform your problems into goals.

Use the Annual Plan to help you outline your goals and timeline for your plan. Don't be afraid to make this a multi year plan!

Report out to the larger group

Back Planning

Back planning enables you to think about the big picture and helps you to leverage the skills and expertise of others to achieve success.

Instead of focusing on “What am I going to do right now?” the emphasis is **first** placed on “What is my end goal?” (*but don’t worry, the ‘right now’ will come soon enough!*)

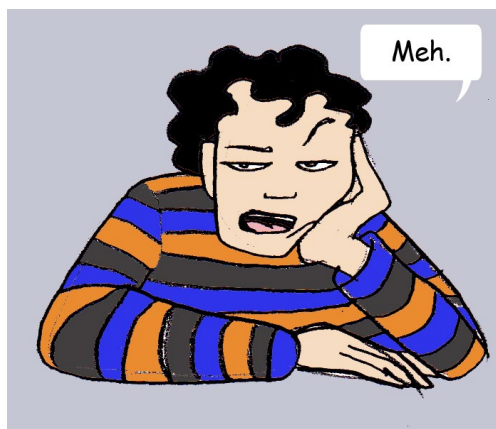
Your ultimate end goal should be to create a well-run leadership pipeline development program so in the future, your local will have a pool of candidates for a variety of leadership positions all well trained and versed in your local’s culture and history who support the goals of the local.

How long does this take? That’s up to you!

CAUSES OF APATHY

Workers are not born apathetic. Apathy is the product of real problems and feelings we may have such as:

- Fear of management
- Economic insecurity, fear of losing job
- Feeling isolated, powerless or hopeless about making positive change
- Confusion, don't know what's happening
- Lack of Knowledge, don't know your rights
- Feeling cynical because of bad experiences in the past
- Feeling individualistic, "I don't need anybody else"
- Feeling inferior or divided due to racism, sexism, misogyny, or professionalism
- Family or personal problems, illness, lack of transportation or childcare
- Other objections, my parents, my partner or my church object



If we blame people for their apathy, they just become defensive or even more apathetic.

But if we understand why a particular member feels apathetic, we may be able to help them overcome the problem that's holding them back. Our own

reasons for activity may give us some positive ideas to counteract apathy.

REASONS FOR ACTIVITY

Union activity can give us something special that we don't get on the day-to-day routine of most jobs.

- Collective power to improve conditions
- A way to solve problems
- A chance to participate in planning and decision-making
- Respect and self-esteem
- A chance to work with people in an equal, democratic and supportive way
- Responsibility and challenge to make a better world
- A chance for education, exposure to new ideas and people
- Friendship and a feeling of belonging
- A sense of purpose, being part of a cause bigger than any one of us.



PRIORITY BOX

	MOST URGENT	LEAST URGENT
MOST IMPORTANT	DO <i>Do it now</i>	DECIDE <i>Schedule a time to do it</i>
LEAST IMPORTANT	DELEGATE <i>Who can do it for you?</i>	DELAY <i>Do it when there is time</i>

Natural Leaders Assessment Tool

	ALWAYS	SOMETIMES	NEVER
Builds appropriate rapport			
Interacts with others in a tactful manner			
Courteous and sensitive to others in the workplace			
Open and approachable when resolving sensitive issues			
Shows others empathy and respect			
Responds to concerns and questions			
Asks for help			
Listens and acknowledges others			
Maintains and enhances self-esteem for others			
Can comfortably diffuse high-tension situations			
Can quickly find common ground with all people			
Can represent own interests and be fair to people or groups			
Picks up on the need to change interpersonal behavior quickly			
Can solve problems with others with a minimum of noise			
Is seen as a team player			
Is cooperative			
Easily gains trust and support of others			
Encourages collaboration			
Can be candid with others and not cause them to become defensive			
Works effectively with all people equitably			

Succession Planning 2022-23

Late August	
September	
October	
November	
December	
January	
February	
March	
April	
May	
June	
July	