

# Follow the Leader

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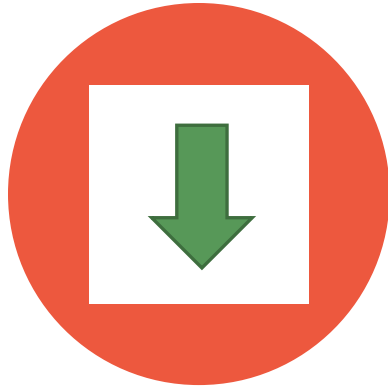
JOAN DEEM, RSD

TOM MCMAHON, LRS

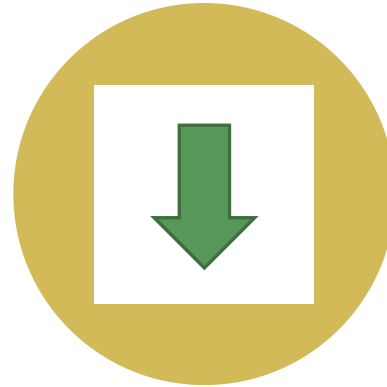
NYSUT TARRYTOWN REGIONAL OFFICE

# Succession Planning Objectives

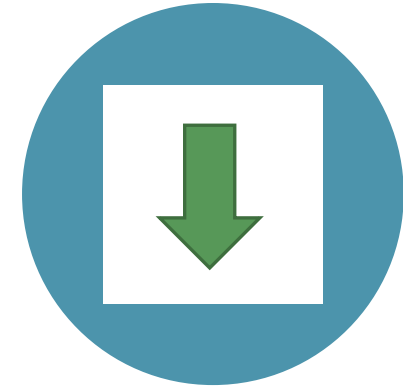
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IDENTIFY RISK FACTORS IN YOUR ORGANIZATION THAT MAKE PLANNING FOR THE FUTURE UNCERTAIN.



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

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# Typical Common Themes

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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

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Are there any vacancies or holes in leadership?

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Are there positions that are routinely difficult to fill?

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Are roles too big for one person?

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Do the same people run for positions year after year?

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

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

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

# Causes of Apathy

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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...

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## 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

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

# The Membership Who, What, and Where

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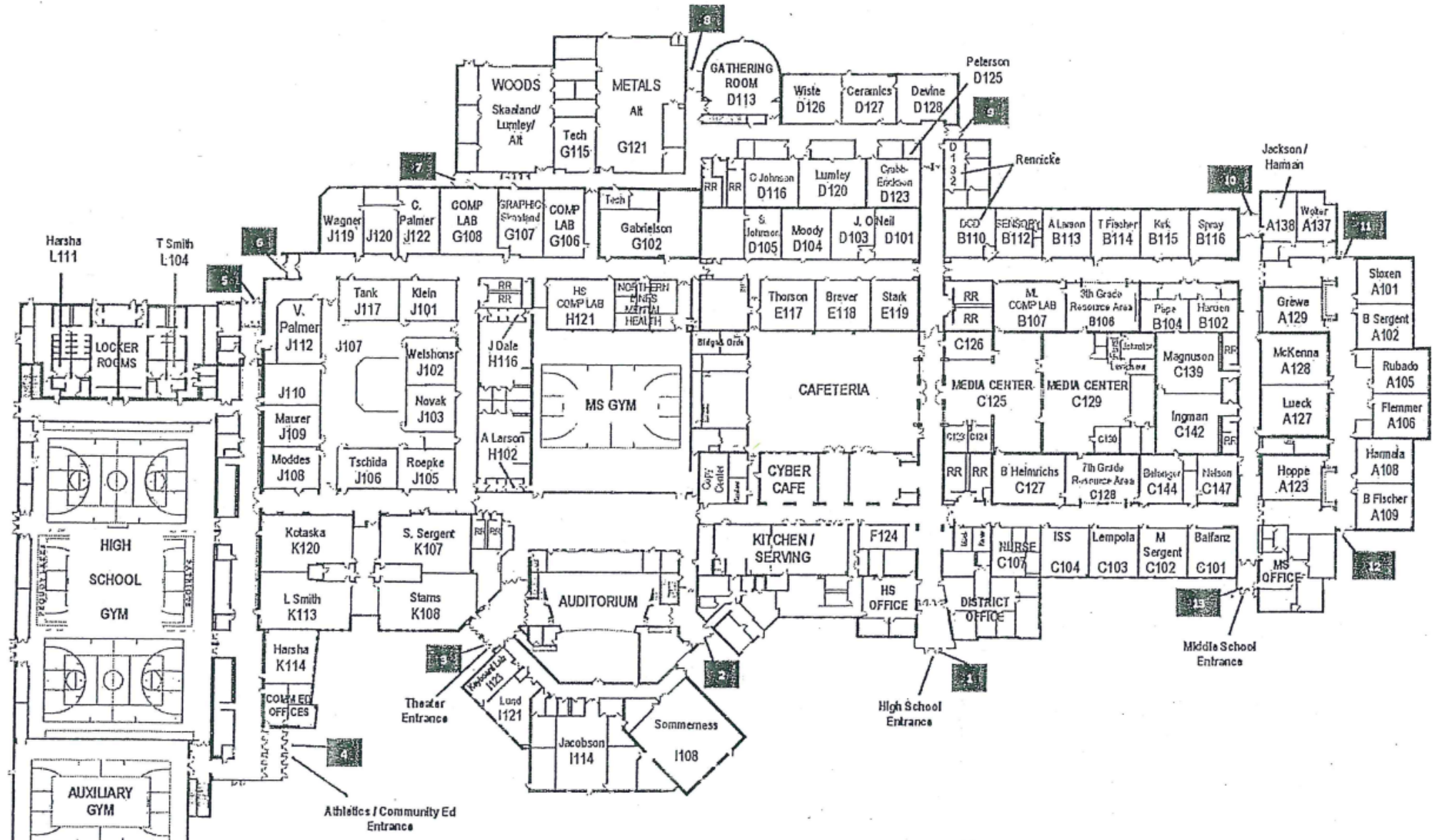
Create and maintain an accurate database of your members

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, involvement in possible constituent groups

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	Unhappy 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.

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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

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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

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

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Views problems, mistakes or difficulties as opportunities to learn.

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Enjoys learning

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Open to new ideas

Growth  
Mindset



## Situational Leadership

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Supportive of others

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Asks questions

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Able to set goals

# Leadership Courage

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Thinks outside of the box and challenges the status quo

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Stands up for convictions

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Encourages people to express their point of view

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Decisive

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Takes personal responsibility for mistakes

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Shares credit for success

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NEVER retaliates

# Small Group Discussion & Activity

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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 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

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

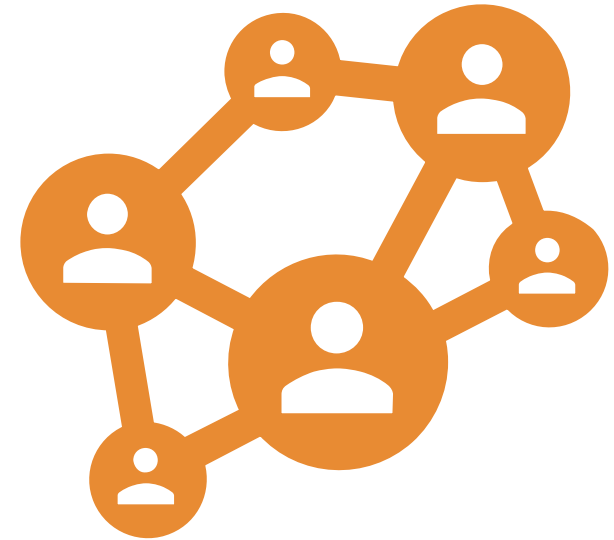
# Goals of a Union Education Program

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- 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

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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

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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

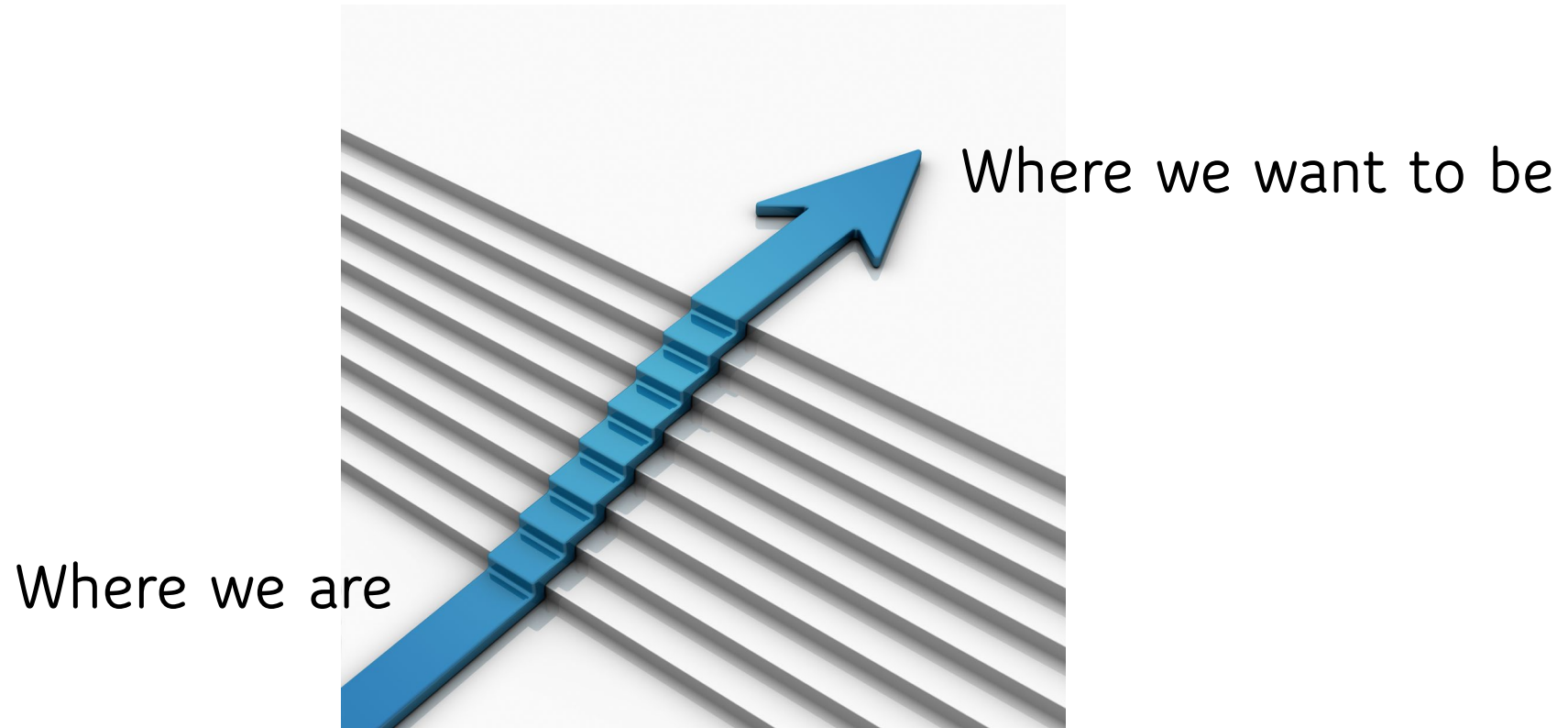


# Succession Planning

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

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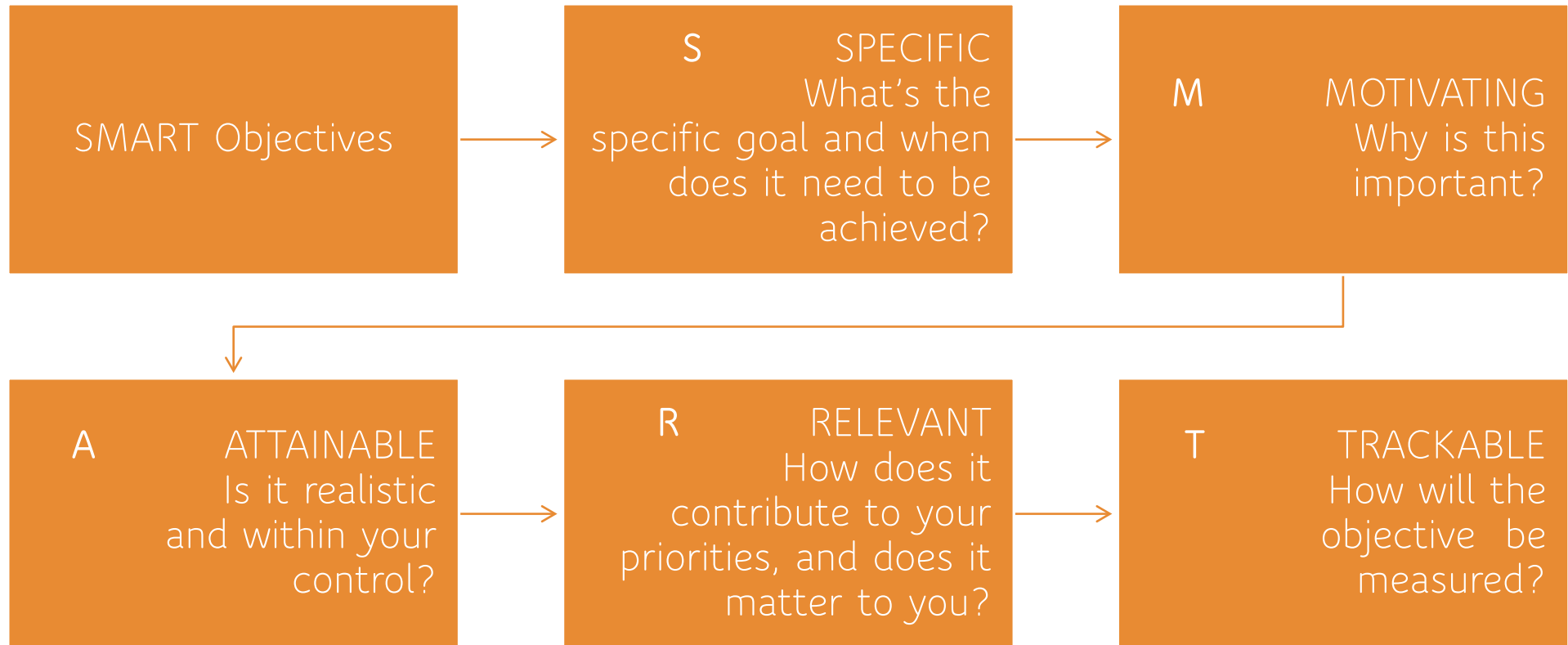
# PRIORITY BOX



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

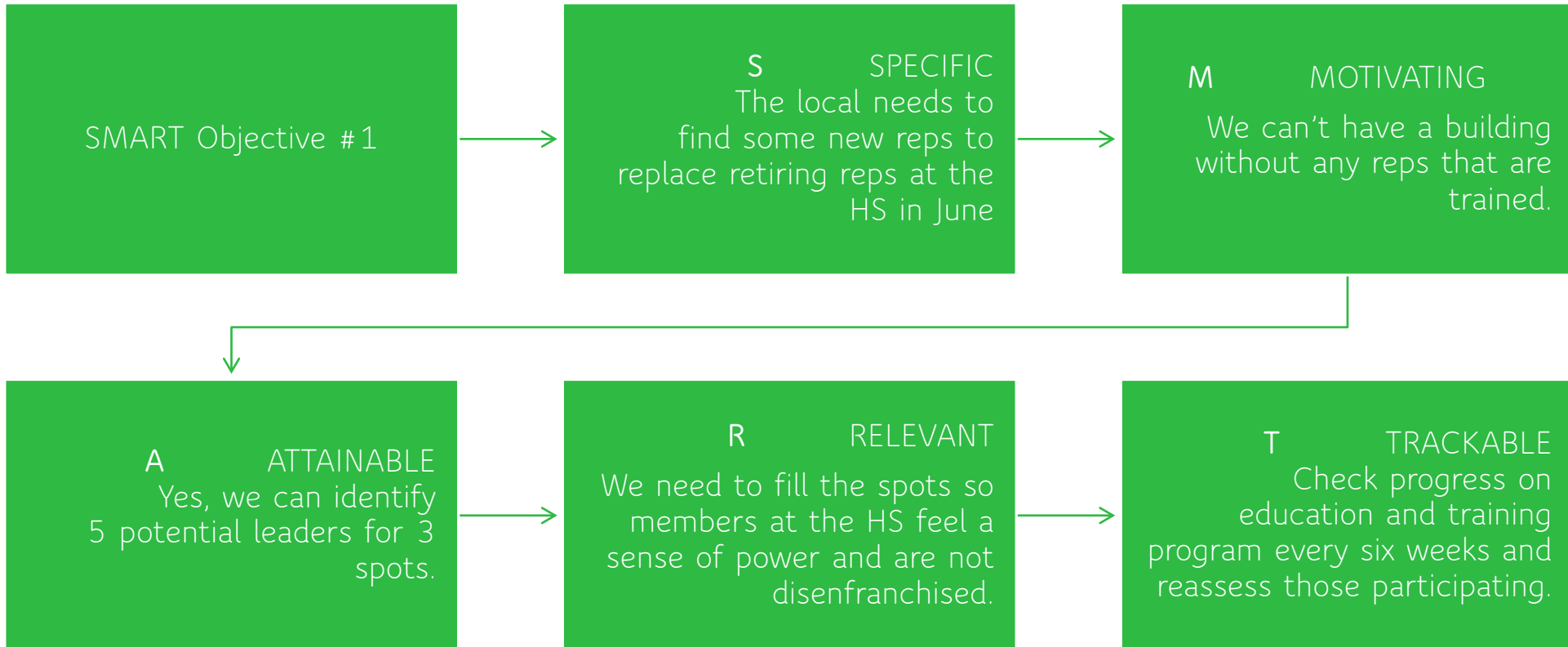
# Identification of Succession Objectives

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# Succession Objective #1

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# Small Group Discussion & Activity

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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

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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

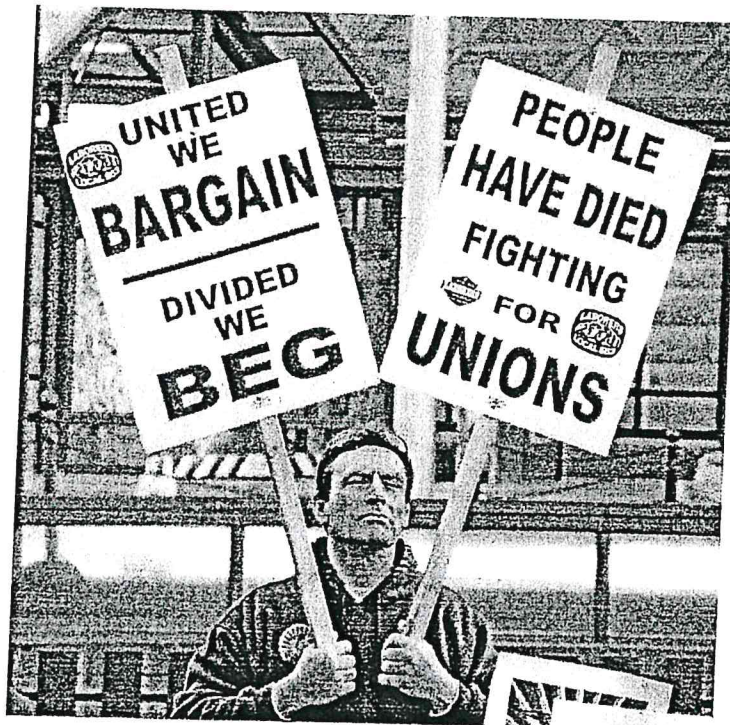
reasons for activity may give us some positive ideas to counteract apathy.



## 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.



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

Here's a few points to keep in mind:

1. Don't.....blame the membership for the problem of apathy.

It only makes the problem worse. The membership will pick up on your negative attitude and stay away from the union.

2. Do..... blame the management for membership apathy.

Remember – management is hard at work to encourage apathy among the membership.

3. Don't.....take a management attitude towards the membership.

If the membership feels you are looking down on them, apathy will increase.

4. Do..... treat the membership as equals and with respect.

Remember – we get involved and stay involved because union activity gives us things management denies us at work: challenge, creativity, equality, and respect.

5. Don't.... expect people to break the habit of apathy overnight.

If we expect people to go from little or no union involvement to a high degree of commitment and involvement in one giant step, we'll be setting ourselves up for failure and disappointment.

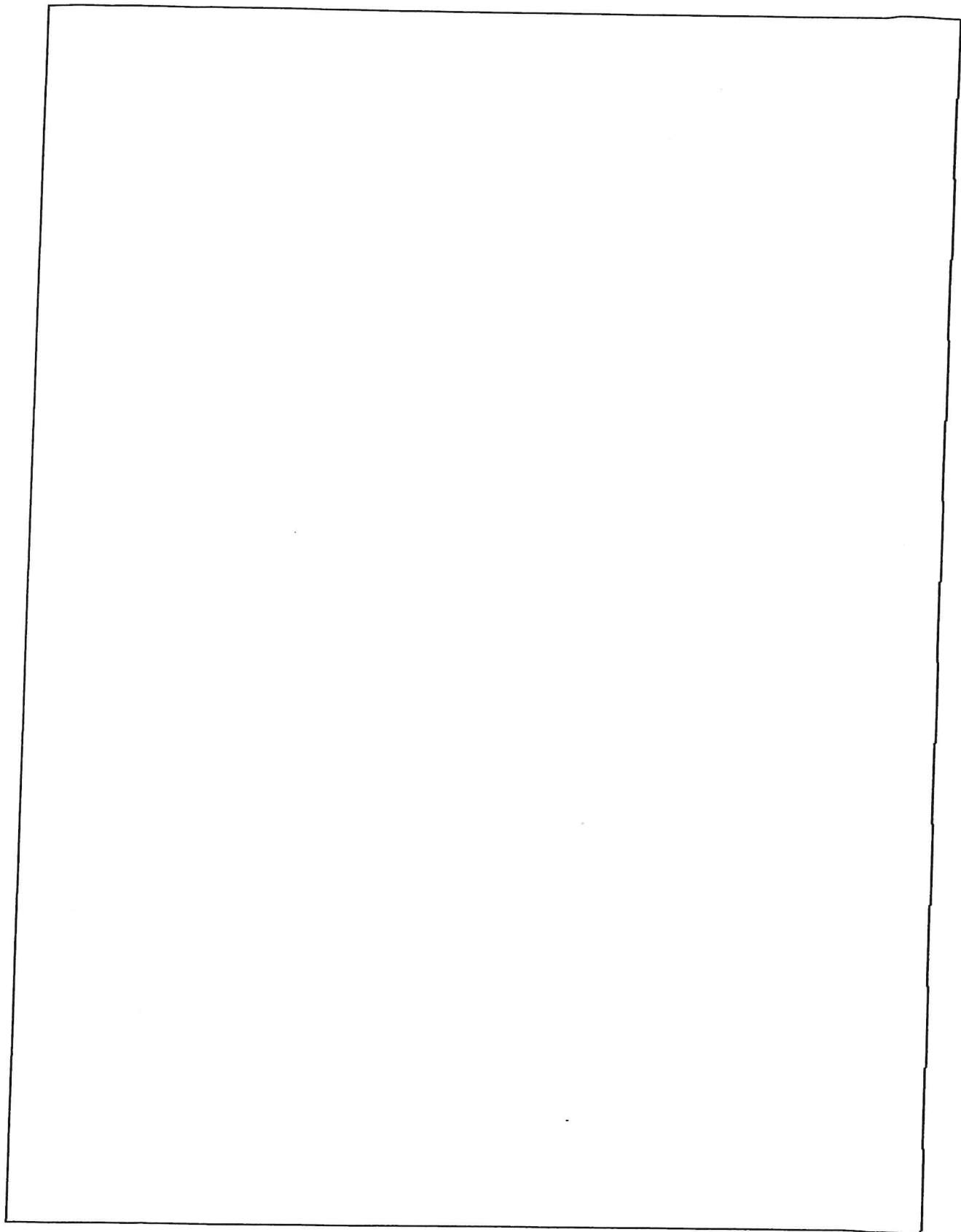
6. Do..... increase the membership's involvement step by step.

It takes time to develop the habit of union involvement. Our job is to find a level of involvement that people can handle and then to slowly increase their commitment and activity.

7. Don't.... think the problem of worker apathy can't be solved.

That's what management wants us to think.

## Your Local's Leadership Structure

A large, empty rectangular box with a thin black border, intended for drawing or writing the local's leadership structure.

# LEADERSHIP COURAGE

## Take time to reflect...

If you find it easier to go along with the status quo...

*...then recognize that just drifting in the stream won't prepare you for possible turbulent rapids ahead. There are times when you need to steer against the current. Remember that convictions only have an impact if you act on them.*

If you're worried your views will turn people against you...

*...then focus on your reason for taking a stand. If something's wrong, it needs to be right. If there's a better way, it needs to be found. Show resolve. You don't have to be popular to be respected.*

If you're worried that what you say will just rock the boat...

*...then ask yourself if holding back is in the best interests of the organization. It might be time to shake things up. You might take some heat today, but tomorrow people may thank you for having the courage to speak up.*



# GROWTH MINDSET SELF IDENTIFY

	FIXED	MIXED	GROWTH
<b>TAKING ON CHALLENGES</b>	You don't normally take on challenges on your own. You feel that challenges are avoided. You prefer to do easy work.	You might take on challenges when you have some previous experience with success in that area.	You look forward to the next challenge and have long range plans for new challenges. If things are easy, you find them boring.
<b>LEARNING FROM MISTAKES</b>	You see mistakes as failures, as proof that the task is beyond your reach. You may hide mistakes or lie about them.	You can accept mistakes as temporary setbacks, but you want to forget about them as much as possible. You don't use your mistakes to learn and improve the next time.	You see mistakes as temporary setbacks- something to be overcome. You think about what you learned from your mistakes and use it to do better at the task.
<b>ACCEPTING FEEDBACK AND CRITICISM</b>	You feel threatened by feedback and may avoid it all together. Criticism and constructive feedback make you feel like giving up.	You may be motivated by feedback if it is not too critical or threatening. It depends on who is giving the feedback and how difficult the task is.	You look for feedback and criticism on your performance so that you can improve. You apply new strategies as a result of feedback.
<b>PRACTICE AND APPLYING STRATEGIES</b>	<p>You do not like to practice and avoid it when you can.</p> <p>You do not have many strategies for accomplishing the learning goals or tasks, or the strategies you're using are not working.</p>	You practice, but a big setback can make you want to quit. You are more willing to practice things you are already considered "good at." You are open to being given a strategy to meet a challenge, but you rarely apply your own strategies unless it is something you are already "good at."	You enjoy practicing and see it as part of the process of getting good at something. You may create your own practice or study plans. You use many strategies, think of some of your own strategies, and ask others about their strategies.
<b>PERSEVERANCE (FOCUS ON TASK)</b>	You have little persistence on learning goals and tasks. You tend to give up at the first sign of difficulty.	You may stick to it and persist if you get support from others. Unless others give you strategies for overcoming obstacles you usually stop or give up.	You "stick to it" and keep working hard until the task is complete, even when it's difficult.
<b>ASKING QUESTIONS</b>	You do not ask questions or do not know which questions to ask, but you can usually say you don't "get it" if asked.	You might ask questions about a portion of the task that you feel you can do. If you perceive it to be outside of your ability and skills, you probably won't ask questions.	You ask lots of specific questions of yourself and others. You don't just take things as they appear – you challenge yourself, the material, the task, and the teacher to make sure that you understand.

## 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			

# Membership Mapping Instrument

<p style="text-align: center;"><b>1</b></p> <p style="text-align: center;">Leader</p> <p style="text-align: center;">Very active</p> <p style="text-align: center;">Frames issues</p> <p style="text-align: center;">Union activist</p> <p style="text-align: center;">Takes initiative</p>	<p style="text-align: center;"><b>2</b></p> <p style="text-align: center;">Strong follower/Potential leader</p> <p style="text-align: center;">Active</p> <p style="text-align: center;">Supportive of issues</p> <p style="text-align: center;">Strongly pro-union member</p> <p style="text-align: center;">Usually do if asked</p>
<p style="text-align: center;"><b>3</b></p> <p style="text-align: center;">Follower</p> <p style="text-align: center;">Sometimes active</p> <p style="text-align: center;">Sometimes supportive of issues</p> <p style="text-align: center;">Passive union member</p> <p style="text-align: center;">Will do if arm is twisted</p>	<p style="text-align: center;"><b>4</b></p> <p style="text-align: center;">Won't follow</p> <p style="text-align: center;">Not Active</p> <p style="text-align: center;">Not supportive of issues</p> <p style="text-align: center;">Non-member or consistently antagonistic</p> <p style="text-align: center;">Will not do/participate</p>

# PRIORITY BOX

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



## Succession Planning 2023-24

<b>Late August</b>	
<b>September</b>	
<b>October</b>	
<b>November</b>	
<b>December</b>	
<b>January</b>	
<b>February</b>	
<b>March</b>	
<b>April</b>	
<b>May</b>	
<b>June</b>	
<b>July</b>	