



A Union of Professionals

A Guide to Engaging Members Through Professional Development and Learning



Randi Weingarten

PRESIDENT

Lorretta Johnson

SECRETARY-TREASURER

Mary Cathryn Ricker

EXECUTIVE VICE PRESIDENT

AFT Executive Council

J. Philippe Abraham

Shelvy Y. Abrams

Mary J. Armstrong

Barbara Bowen

Christine Campbell

Zeph Capo

Alex Caputo-Pearl

Donald Carlisto

Larry J. Carter Jr.

Kathy A. Chavez

Melissa Cropper

Evelyn DeJesus

Aida Diaz Rivera

Jolene T. DiBrango

Marietta A. English

Eric Feaver

Francis J. Flynn

David Gray

David Hecker

Jan Hochadel

Fedrick C. Ingram

Jerry T. Jordan

Ted Kirsch

Frederick E. Kowal

Karen GJ Lewis

Louis Malfaro

Joanne M. McCall

John McDonald

Daniel J. Montgomery

Michael Mulgrew

Ruby J. Newbold

Candice Owley

Andrew Pallotta

Joshua Pechthalt

Paul Pecorale

David J. Quolke

Stephen Rooney

Denise Specht

Wayne Spence

Tim Stoelb

Ann Twomey

Adam Urbanski

Our Mission


The **American Federation of Teachers** is a union of professionals that champions fairness; democracy; economic opportunity; and high-quality public education, healthcare and public services for our students, their families and our communities. We are committed to advancing these principles through community engagement, organizing, collective bargaining and political activism, and especially through the work our members do.

Copyright © American Federation of Teachers, AFL-CIO (AFT 2018). Permission is hereby granted to AFT state and local affiliates to reproduce and distribute copies of the work for nonprofit educational purposes, provided that copies are distributed at or below cost, and that the author, source, and copyright notice are included on each copy. Any distribution of such materials to third parties who are outside of the AFT or its affiliates is prohibited without first receiving the express written permission of the AFT.



A Union of Professionals

A Guide to Engaging
Members Through
**Professional
Development
and Learning**

A woman with dark hair pulled back, wearing black-rimmed glasses and a vibrant, multi-colored beaded necklace, is shown in profile from the chest up. She is looking upwards and to the right with a thoughtful expression. She is wearing a teal-colored top. The background is a dark chalkboard with some faint, illegible white markings. The lighting is soft, highlighting her face and the necklace.

One of the most important services the union can provide to its members is high-quality professional development.

SECTION ONE

Facilitating an Efficient Professional Development Program

Introduction

One of the most important services the union can provide to its members is high-quality professional development. PD offerings fulfill a central tenet of the AFT's philosophy of professional unionism: that the benefits of the union are not just limited to the traditional hallmarks of labor like collective bargaining, better working conditions and job security, but have expanded to include a keen emphasis on helping educators cultivate their professional expertise.

Professional development can be the heart of a full-scale school redesign effort, promoting the vision of the school as a learning community. For this to occur, it is necessary to conceive of the process as one of continuous growth and school renewal that requires changes in how we as educators think and interact with one another. If we move beyond a view of the school as a collection of individual teachers and "their" classrooms to a view of the school as a collective entity, we can coordinate efforts throughout a school to create fundamental cultural changes.

Professional development (PD) that is designed to promote professional learning is an essential element of comprehensive and systemic school and district reform. A professional learning system includes a framework and processes to ensure that educators have the time, tools and resources to advance student learning. A systems approach emphasizes the relationships among the elements rather than the individual components. A cornerstone of comprehensive or systemic school and district reform is a professional learning program that enables all school staff, educators and administrators to have the learning opportunities they need to be successful.

These recommendations provide a framework as we collectively strive to shape a culture of professional unionism that retains the principles on which the

AFT was founded. We recognize that not every local or state affiliate will be able to implement every recommendation, but all can do something. Making this commitment will not be easy, but the AFT is here to support you and your members in any way we can.

REGIONAL COORDINATORS:

GREAT LAKES

Dawn Krusemark
dkrusemark@aft.org

NORTHEAST

Lisa Dickinson
edickinson@aft.org

SOUTHERN

Rosalind LaRocque
rlarocqu@aft.org

SOUTHWEST & MOUNTAIN STATES

Lisa Thomas
lthomas@aft.org

WESTERN & FLORIDA

Melanie Hobbs
mhobbs@aft.org

Principles for Professional Development

Locals that aspire to create their own professional development program for their members' benefit must recognize that the best programs share a distinct set of common traits based on AFT's principles of professional development.

Professional development is a continuous process of individual and collective examination and improvement of practice. It should empower individual educators and committees of educators to make complex decisions; to identify and solve problems; and to connect theory, practice and student outcomes.

1. Professional development should deepen and broaden knowledge and content.
2. Professional development should provide a strong foundation in the pedagogy of particular disciplines.

3. Professional development should provide knowledge about the teaching and learning processes.
4. Professional development should be rooted in and reflect the best available research.
5. The content of professional development should be aligned with the standards and curricula teachers' use.
6. Professional development should contribute to measureable improvement in student achievement.
7. Professional development should be intellectually engaging and address the complexity of teaching.
8. Professional development should provide sufficient time, support and resources to enable teachers to master new content and pedagogy and to integrate this knowledge and skill into their practice.
9. Professional development should be designed by teachers in cooperation with experts in the field.
10. Professional development should take a variety of forms, including some we have not typically considered.
11. Professional development should be job-embedded and site specific.

Unions must find ways to engage more of their members to stay strong and build capacity. One of the ways to engage members who will never file a grievance or engage in political activity is by offering opportunities to make their professional lives better, to arm them with knowledge they can use every day as they become more successful, more satisfied with the outcomes of their work, and more respected in the eyes of the community.

Preparing to Build Capacity for a Professional Development Program

Successful professional development programs or learning systems share a number of common traits: effective trainer recruitment, identifying a

target audience with a plan for outreach, marketing and buy-in strategies, addressing logistics and accessibility of offerings, securing funding, a process to customize while maintaining high-quality standards for course content, a focus on continuous improvement with labor-management support and collaboration with higher education partners. To incorporate professional issues into the core of union activities, union leaders must understand the elements of high-quality professional development and be able to advocate and negotiate for the policies and structures necessary to design a system of professional support for its members. To be successful, leaders must be able to learn how to:

- Select the right people to facilitate the local PD program.
- Develop strong collaborative partnerships with stakeholders and district superintendents from a strategic perspective, with a goal in mind and a plan for accomplishing the goal.
- Build effective coalitions with other groups and agencies having similar goals. The union cannot go it alone, and it cannot be solely responsible for absorbing the costs associated with enhancing members' practice, nor for the programs members should have available to them.
- Create a communications plan on professional issues, both to the members and the public. Effectively making the case for the union's involvement requires well-developed communications skills and plans for sharing information.
- Be involved in the decision-making that affects the members.
- Analyze state and/or district budgets to identify potential funding sources to address professional issues.



Consider the extent to which your local has:

- Developed and communicated a vision/function of professional learning as a part the educational system;
- Defined professional learning;

- Established quality indicators utilizing the standards for professional learning;
- Articulated roles and responsibilities to all stakeholders; and
- Allocated resources for ensuring professional learning.

Selecting, Supporting and Recruiting Trainers

First and foremost, successful programs recognize that trainers are the backbone of a local's professional development program.

High-quality PD programs systematically recruit and prepare effective trainers who exhibit a number of essential characteristics, including effective teaching, communications and problem-solving skills.

To identify and develop talented teacher leaders who will act as effective professional development trainers for their peers and colleagues, and secure those who may exemplify leadership qualities.



Consider the extent to which your local has:

- Developed a process for identifying and vetting potential recruits to become professional development trainers. The vetting procedure could include conducting interviews, contacting professional references, etc.
- Outlined clearly the expectations for and responsibilities of trainers so that candidates are well aware of what the position entails.
- Communicated clearly to members the quality and qualifications of the PD trainers.
- Ensured that trainers are properly and adequately trained.
- Developed a plan to elevate educators through leadership roles.
- Have selected dedicated personnel and offered stipends and/or dues reimbursement, when appropriate.
- Designed supports to protect against trainer burnout.

- Communicated to members about avenues to becoming teacher leaders, including the AFT Teacher Leaders Program.

Outreach, Marketing and Creating Buy-In

The success of a professional development program is dependent on the interest and participation of members; thus, the best programs systematically implement effective marketing and outreach strategies across various means of communications to generate awareness and buy-in of the PD offerings. Incentives and support included as a part of an outreach strategy can help mobilize and engage members, fostering a commitment to engage in professional development. Building relationships with the district and institutes of higher education provides sustainable support for the local's program.

With the help of a trainer cadre/team, a local can determine who the specific audience for a professional development offering, event or program will be; the local then can appropriately tailor the outreach and instruction to that audience to create incentives among prospective attendees to encourage participation and satisfaction with PD offerings.

Outreach



Consider the extent to which your local has:

- Identified the target audience for your marketing and outreach campaign.
- Provided a list of available course offerings as a printout, online and via social media, if possible.
- Customized your message to match your target audience.
- Identified the platforms and tools you will utilize for marketing and outreach. These could include, but are not limited to, social media (Facebook, Twitter, Pinterest, etc.); emails; postcards to members; robocalls; tabling at state conventions; AFT

eLearning; and word-of-mouth promotions by union leaders, building representatives, and/or other active members of the union. All promotion via social media should make use of the hashtag #AFTPD.

- Promoted the relevance of AFT professional development offerings to pressing contemporary issues in the teaching profession (e.g., College- and Career-Ready standards, classroom management, student engagement, evaluation rubrics, etc.).
- Reached out to school board members, district administrators, and other stakeholders with an invitation to attend and promote AFT professional development sessions.

Marketing and Buy-In



Consider the extent to which your local has:

- Developed a marketing and outreach message that will foster members' interest in AFT professional development by surveying union members to determine what their needs and wants are for professional development.
- Differentiated PD offerings to meet the needs of educators at different stages of their careers (i.e., new vs. veteran teachers).
- Connected professional development offerings to available student data.
- Emphasized the positive impacts of AFT professional development on student achievement.
- Acquired testimonials, preferably from your community, from teachers describing their positive experiences with AFT professional development to feature in your marketing campaign.
- Connected the AFT professional development offerings with the prospect of professional growth and/or salary advancement.
- Tailored PD offerings to the specific needs and conditions of your region, state and/or district, particularly classroom practice.
- Connected your PD program with your district's teacher evaluation process.

Logistics and Accessibility

To ensure that professional development offerings run smoothly and efficiently and to guarantee all participants are able to access them with minimal inconvenience and maximum benefit, consider the extent to which your local has:

- Developed a schedule/agenda for the professional development session.
- Determined the convenience of the location and availability of parking (where appropriate) for your PD event.
- An awareness of the size of your district and an estimate of how many attendees you are expecting.
- Planned the timing of the event to accommodate the schedules of attendees, taking into account the variability of school dismissal times across a district.
- Equipped trainers with the proper equipment and materials necessary to facilitate the PD session(s).
- Created multiple formats of professional development offerings, including face-to-face, online or a hybrid of both.

Securing Financing and Other Resources

To ensure maximum quality for participants, locals must responsibly and efficiently fund the professional development programs.



Examine the extent to which your local has:

- Created a budget for your prospective professional development offerings.
- Investigated the availability of district and union funds to finance PD opportunities.
- Explored the potential for grant-funding some or all of the PD offerings.
- Addressed other issues related to financing, including budget line items, cost, and charging member fees.

Maintaining Course Content

Successful professional development programs and learning systems cultivate high standards for program development. Content standards are customized to the particular context of local teachers, ensuring that PD offerings are tailored to meet participants' specific needs.

Once course offerings are established, you must systematically examine, assess and revise them to maintain the high quality the profession demands and students deserve. As new research emerges, policies change, or members' needs differ, so might your professional development offerings.

Taking steps to include these qualities in a new professional development program is essential to ensure long-term success. The successful implementation of a high-quality PD program is an indispensable service to members, the union and the teaching profession as a whole.



Consider the extent to which your local has:

- Developed a process for assessing members' professional development needs.
- Designed a way to examine changes in course content.

Building Labor-Management Relations

To build and sustain a successful professional development program and learning system, you must create a program that is tailored to the specific conditions in your district, which will make it easier to establish a labor-management relationship. The goal is to use that relationship to create the learning structures, arrange the schedules, and provide job-embedded support teachers need to deliberately and successfully implement high-quality instruction learned from their PD experiences, in order to raise student achievement.



Consider the extent to which your local has:

- Developed a strategy for engagement or has a plan to reach out for initial discussions. If assistance is needed, get in touch with the contact person for your AFT region. (See Appendix A.)
- Established a partnership with a district point person.
- Aligned district, school and individual goals to support professional learning and foster the achievement of common goals.
- Helped everyone in the system to understand shared priorities.
- Has addressed the gaps that exist in your in-district professional development with your own AFT professional development offerings.
- Ensured that the desired outcomes for individuals, teams, grade levels and content-area departments are coherent.
- Considered how teachers with different levels of knowledge, experience and skills need a range of supports.

Collaborating with Higher Education Institutions

Professional learning systems often tap into the resources and expertise of local teacher preparation programs to maximize the effectiveness of the PD program and to foster a mutually beneficial relationship with important community institutions.



Examine the extent to which your local has:

- Collaborated with local institutions of higher education in the creation of your professional development program.
- Explored the possibility of a joint conference with your union, district and local college(s).
- Participated on college advisory boards for teacher preparation programs.

- Looked at the possibility of administering AFT professional development courses through a local college for graduate credit.
- Negotiated with local colleges over course fees.
- Created professional development offerings that can be used for credit or teacher recertification.

SECTION TWO

Program Structure and Design

In the first section of this guide, we explored things to consider if you are attempting to institute AFT professional development, with the goal of having it support a professional learning system design in schools. Now let's examine the nuts and bolts of a successful PD program.

Governance Structure: First Steps

The PD Team

It is important to note that the governance structure of the local's professional development program does not operate outside the governance structure of the union.

The decision to start a program should be discussed with the executive body because there will be financial implications. If approved, the information should be shared at a building rep meeting and then at a general meeting. At these meetings, you will want to cite the benefits of the program and its relationship to the work educators do, which results in positively affecting student learning. The governance structure will include the local leader, executive board, the local site coordinator (LSC) and the local trainers, as you select individuals to be trained in the various courses.

AFT PD Training Process

Identifying Members /Local Trainers to Lead Your PD Program

The AFT PD program is based on a capacity-building training-of-trainers model. This model focuses on the training and preparation of individuals through specific professional development activities that eventually qualify them as "expert" trainers. They, in turn, train others in a pyramiding effect designed to reach larger numbers of participants. Successful LSCs and trainers must share common attributes. (See *Appendix B.*)

A local that chooses to become involved in AFT PD identifies one or more individuals to attend an AFT-sponsored Summer Educator Academy (SEA). The application process steps, cost and local commitment information will be delineated in an email from the national. It is advisable to send the LSC and one other potential trainer to the academy. Both can attend the same course or it may be more cost-efficient to select another course to address one other locally identified need. At SEA, participants learn about the research and its applications, as well as strategies and skills to help them present this information to classroom practitioners and school-related personnel.

In addition, LSCs learn how to establish and manage a local PD program, budgeting, marketing and logistical planning for professional development sessions in an ongoing process. Above all they learn how to deal with the adult learner, a skill essential to their success. Prior to sending participants, the assigned coordinator for the region will help the local develop a local action plan (LAP) for the professional development program, using the guidelines in the first section of this document. Again, the plan should be designed to meet the needs of the local and its members. As the local hosts PD sessions and interacts with members, the local will, in addition to supporting members' professional growth, identify additional trainers whom they may send to the SEA the following year and thus build the local cadre of trainers; and so the leadership program of the local PD program begins to expand.

The local site coordinator is the individual designated by the local president to be responsible for the overall management of the AFT PD program. Paramount to the success of the program, LSCs must possess the skills to work with adult learners.

LSC responsibilities include:

- Participating in the development of the local action plan;
- Attending a training(s) offered by the AFT;
- Overseeing local program implementation (logistical planning, budgeting, marketing and supplies);
- Orchestrating various modes of delivery (national/state/local/online; mini-academies; Strategies for Student Success (SSS) three-hour modules or a full course.
- Identifying potential trainers during local training programs;
- Regularly convening the local PD leadership team (other local trainers, possibly the local leader or executive board member);

- Serving as the PD liaison to the local leadership, possibly to the district's administration, and to the AFT Professional Learning program staff;
- Coordinating the integration of new strands as the program expands;
- Being responsible for completing and submitting all required paperwork (to the local, the district, state education agency, any collaborating university and the AFT);
- Participating in LSC training sponsored by the national AFT; and
- Serving as the spokesperson for the local's PD program.

Several of the mentioned responsibilities are also required by the local trainers (*See Appendix B*). The goal of the AFT Professional Learning program is for the local union to have the capacity to deliver high-quality professional development to all or most of its members.

Continuous Learning

There are many tentacles to this program and it is advisable to keep up with additional information, normally shared via webinars, post SEA. These webinars will cover additional information, not limited to, but on topics such as, how to build partnerships, leveraging Title II funds, advocating to reallocate district funds, seeking grants and even the possibility of creating a 501(c)(3), if applicable. While marketing may sound simple, it is really complex at the implementation stage. In short, the AFT would like to continue the conversation around all aspects of continuous growth and expansion.



A professional development plan should be designed to meet the needs of the local and its members.

First Steps to Building a Member Engagement Professional Development Program

The list of indicators in this rubric is designed to generate thinking as you embark on designing and implementing a professional development program to support a professional learning system in your local. Not all indicators may be applicable at any given time, but they should help establish that you have covered sufficient ground to ensure a successful program.

Steps to Planning a Professional Development/Professional Learning System

Develop and communicate a vision/function of professional learning as a part the educational system.

The local should:

- Identify the role of the program in the local;
- Set goals that will determine success;
- Articulate roles and responsibilities to all stakeholders;
- Allocate resources for the program;
- Create a clearly defined application process to identify educators with leadership qualities;
- Create a peer review process in which colleagues respond to a variety of questions regarding the applicant (selection of peers can take different approaches);
- Develop a plan to build the local trainer pool;
- Clearly outline trainer responsibilities;
- Secure the budget to send trainers to the AFT Summer Educator Academy and to support the local program;
- Develop a communications plan to inform members about the program to show the effect it can have on their profession and the decisions that affect their profession;
- Draft a plan to use the program to elevate educators through leadership roles;
- Identify a target audience to whom the professional development information will be marketed;
- Begin to build relationships and partnerships with the district around professional development;
- Begin to build relationships and partnerships with local universities, if possible, to grant credit for courses taken in the program; and
- Skillfully address concerns regarding logistics and program accessibility.

Continuous Learning

Learning does not stop because the SEA where trainers received their training is over. Successful professional development and the establishment of a professional learning system require continuous learning.

The local has committed to:

- Participate in post-SEA webinars;
- Be mindful of sustaining the program and the relationships that contribute to its success; and
- Periodically assess the appropriateness of the content at the time it is being offered.

Governance Structure: First Steps

- The program has the approval of the executive body.
- Building reps and the general membership have been informed of the plan to implement the program and its benefits.
- The executive body has approved a line-item budget for program implementation.
- The local site coordinator has been identified.
- The LSC has received basic training on starting up and implementing a program.

AFT PD Training Process

- The needs of the local have been identified through focus groups, survey, district priorities or some other reliable means.
- Local trainers have been identified based on local needs and district priorities.
- There is a budget to support this endeavor.
- Plans are being made to send individuals to SEA.
- Local is committed to continuous learning and will participate in AFT-sponsored activities that support continuous growth and expansion of their PD program.

Appendix A

ATTRIBUTES FOR LOCAL SITE COORDINATORS AND TRAINERS

Criteria for Selection of the Local Site Coordinator

The local site coordinator should:

- Be a union member in good standing;
- Be knowledgeable about school and union issues;
- Be recognized as an effective teacher, paraprofessional or other school staff;
- Be trusted by peers;
- Exhibit leadership skills;
- Demonstrate effective communications and interpersonal skills;
- Exhibit good program coordination/management skills;
- Be able and willing to devote the time needed to be trained and to coordinate the local program;
- Be willing to open his or her classroom to colleagues, as a “demonstration site”;
- Be willing to work with local union leaders to design the overall local action plan;
- Be willing to bear full responsibility for implementing that plan, which includes:
 - training local trainers and disseminating research information to others;
 - preparing local members to participate in courses and training;
 - working with local trainers to integrate their course training into the overall local professional development program; and
 - explaining and discussing the program and its local operation to outside audiences, including school administrators, school board members, parents, the media and the public.

Characteristics of Effective Local Site Coordinators and Trainers

Effective local site coordinators and trainers:

- Are viewed as effective teachers;
- Are trusted by peers;
- Operate on a professional level;
- Are committed to their own professional growth;
- Possess good interpersonal communications skills and can develop and maintain rapport;
- Can facilitate the functioning of adult groups;
- Exhibit empathy for others and respect individual differences;
- Are risk-takers and innovators;
- Are organized and task-oriented;
- Are self-directed and take initiative;
- Can be depended on to follow through;
- Are able to evaluate problems and develop alternative solutions to them; and
- Have good rapport with building administrators (if on site or visiting a school).

Appendix A *(continued)*

Helpful Attributes for a Local Site Coordinator

- Professional expertise. The local site coordinator must be recognized as an effective teacher, paraprofessional or school-related staff member.
- Commitment and time. The local site coordinator must have sufficient time to accomplish program responsibilities and be able to make good use of that available time.
- Leadership. The local site coordinator should demonstrate leadership capabilities, both within and outside the union, and be able to work with others to get the job done.
- Knowledge of the “system.” The local site coordinator should have information (or know where to get it) about both the union structure and the district structure (e.g., he or she should know or be able to find out which administrators are cooperative, which ones need to be involved in a collaborative partnership, what “protocols” must be observed to accomplish necessary tasks, and which teachers have the qualities necessary to function as effective research dissemination coaches).
- Commitment to and modeling of continuing professional growth. Local site coordinators, who are themselves reflective practitioners and lifelong learners, can more effectively motivate and model this commitment for others.
- Ability to relate to local universities, research centers, etc. Establishing relationships with local universities and/or other research facilities is of great benefit.
- Ability to develop the support and commitment of the administration. Such support increases the likelihood of success for the program.
- Good interpersonal and communications skills. It is essential that the local site coordinator relate well to others and communicate effectively.

Appendix B

PROGRAM BENEFITS

- This research-based program improves student achievement by improving classroom practice.
- This union-sponsored professional development program improves teacher quality by increasing teacher knowledge, which has a positive impact on teaching and learning.
- Connects education practitioners to the researchers at the foundation of their knowledge base.
- Highlights the importance of reflection while providing strategies that support teaching and learning.
- Armed with the research knowledge, educators can intelligently participate in decision-making processes and help prevent decisions that could threaten teaching and learning.
- The research plus the union give educators an informed collective voice.
- Informed educators can use research-based instructional strategies and theories to discourage quick-fix education fads.
- The philosophy of the program promotes teaching classroom educators through a training-of-trainers model; research has proven that educators learn best from each other.
- The program provides leaders with a research-based knowledge, which they can use when tackling challenges to the union.



A Union of Professionals

American Federation of Teachers, AFL-CIO
555 New Jersey Ave. N.W.
Washington, DC 20001
202-879-4400



aft.org



AFTunion



@AFTunion



AFTunion

