

The Future of the  
Illinois Education Association  
Final Report



Report prepared by  
Global Business Network  
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## Part One: Introduction and Overview

This report contains the results of a scenario planning project on the future of the Illinois Education Association (IEA). The report is divided into the following parts:

- I. An introduction on scenarios, their use, and the trajectory of the project
- II. A review of the logic of the scenario matrix
- III. The scenarios, their implications, early indicators, and strategic options
- IV. Strategic priorities

Following this section there is an appendix that contains a list of critical issues, key factors and environmental forces.

### What Are Scenarios . . . and What Are They *Not*?

Scenarios are alternative environments in which today's decisions may be played out. They are not predictions. Nor are they strategies. Instead they are descriptions of different futures specifically designed to highlight the risks and opportunities involved in specific strategic issues.

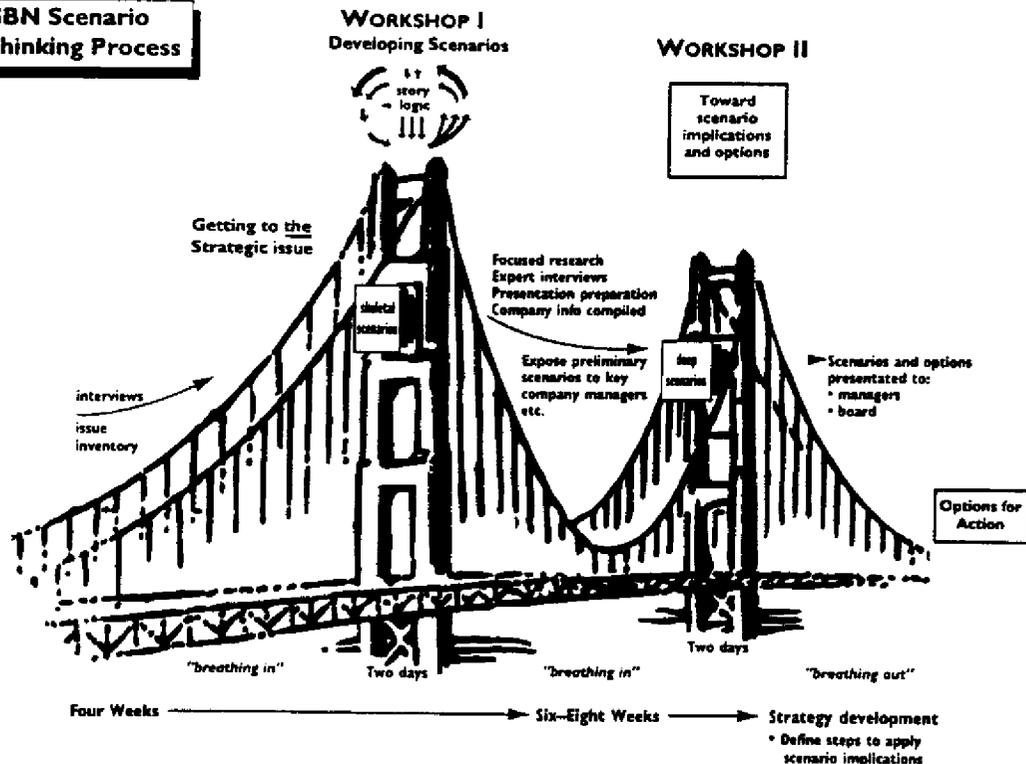
Scenarios can help overcome scholarly anxiety about the lack of hard evidence regarding the future, for scenarios do not claim to be predictions. The point is not to gather evidence for some induction about a most probable future. The point is rather to entertain a number of different possibilities to better make reasoned choices among them.

We cannot know what the future will hold beforehand. So-called futurists cannot be seers. But we can see in the present several trends, which, moving on their current course, will change the IEA over the next ten to fifteen years.

The Global Business Network scenario planning process begins with an issue inventory. GBN conducted over a dozen interviews with IEA staff and other participants in the education system of Illinois prior to an initial scenario development workshop. At that workshop in October 1998, a team of IEA staff created outlines of four scenarios. Following that first workshop, IEA and GBN staff expanded those outlines into the scenario narratives contained in this report.

At a second workshop in December, the scenario team reviewed the scenario narratives and asked the question: So what? Assuming that any of these scenarios might play out, what strategic options would be relevant to each scenario, and what strategic priorities should IEA pursue in light of the uncertainties mapped by the set of scenarios taken as a whole?

## GBN Scenario Thinking Process



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There are two very different ways in which scenarios can assist those involved in the strategic conversation. First, scenarios can help decision-makers to rehearse specific futures in their imaginations. After imaginatively dwelling in each scenario, participants can develop strategic options that are appropriate to managing in just that scenario. When enough early indicators of that scenario begin to appear, there is already a list of strategic options ready to hand for immediate implementation.

A second way to use scenarios asks those involved in the strategic conversation to consider the real uncertainty of not knowing which of four scenarios might unfold. Following this second approach, the scenario team considers all four lists of scenario-specific strategic options, then prioritizes those options in order to find a few strategic thrusts that are robust across the range of scenarios.

This report includes the results of both approaches. Appended to each of the scenario narratives is a list of implications, early indicators, and strategic options that would be appropriate if a sufficient number of early indicators suggest that reality is tipping its hand in the direction of that scenario.

Part Four records a description (and greater detail) of the process that yielded the following strategic thrusts that are robust across the range of scenarios:

- Create learning communities
- Use scenarios to provoke a strategic conversation with the membership

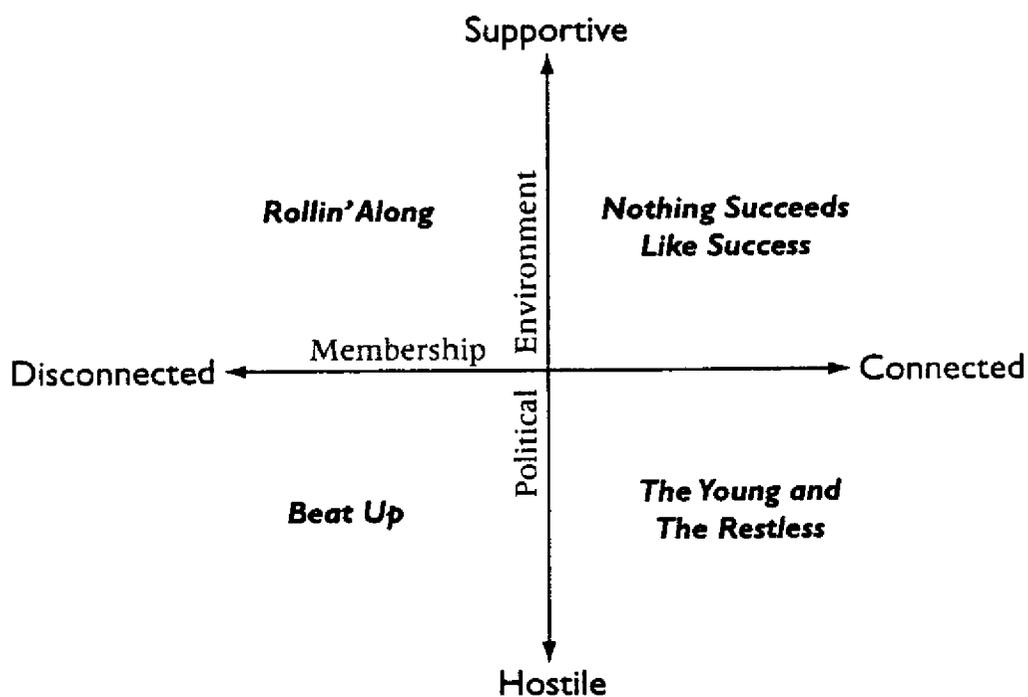
- Recruit, organize, and train new members
- Modify organizational structure
- Reach out to private schools
- Reach out and create coalitions
- Listen harder to membership



These two axes were then used to create the scenario matrix and one scenario was developed for each quadrant. This matrix along with the titles of each scenario is at the end of this section of the report.

Other important and uncertain categories, considered later on in the development of the scenarios, were the issues of quality, the role of education, ethnic and economic diversity in schools, the health of the economy, the role of technology and the decentralization of the decision-making.

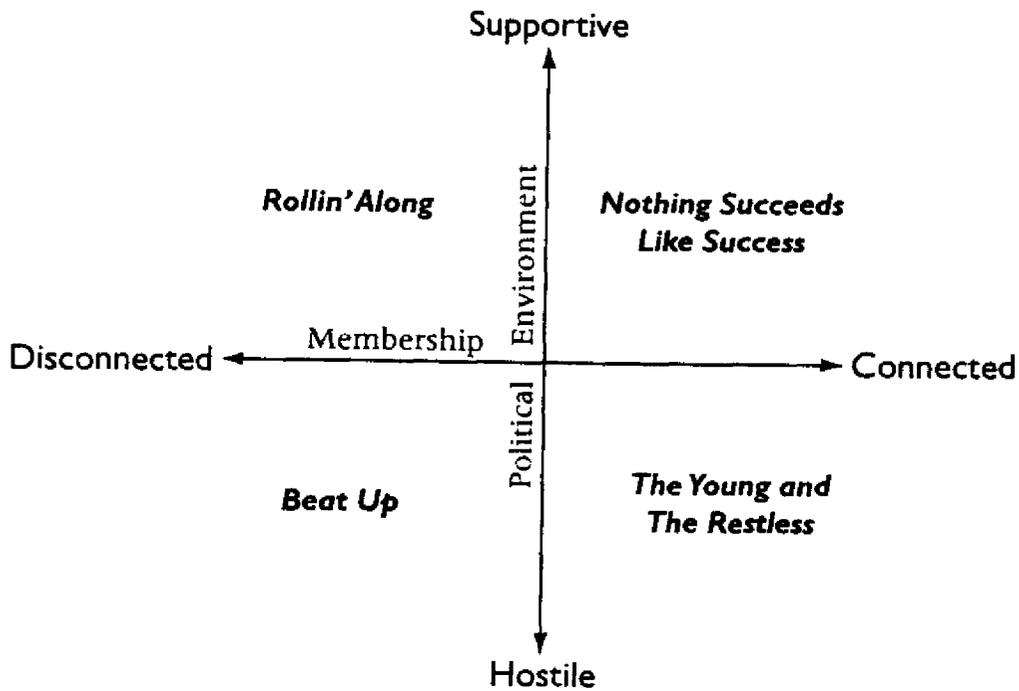
### The Final Scenario Matrix



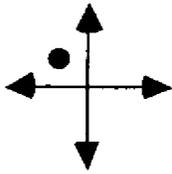
## Part Three: Scenario Narratives, Implications, Early Indicators, and Strategic Options

This section contains the following scenario narratives:

1. Scenario One: *Rollin' Along*
2. Scenario Two: *Beat Up*
3. Scenario Three: *The Young and the Restless*
4. Scenario Four: *Nothing Succeeds Like Success*



## Scenario One: Rollin' Along



- **Supportive Political Environment**
- **Disconnected Membership**

*The Illinois Education Association in the early years of the new millennium found itself experiencing difficulties at the very time that school funding was adequate and a supportive climate for education had developed. The organization simply failed to respond and adapt adequately to the very rapid changes taking place around them. Internally, the demographics of their membership shifted seemingly overnight. By attempting to just keep rolling along, this once progressive organization in a few short years became a struggling group in search of an appropriate role in a changed world.*

Gazing through the window of her second story rented office space at the end of Edwards Street in Springfield, Illinois, Illinois Education Association President, Thomasina Hargrove, studied the art deco architecture of the building just a few hundred feet away that was once IEA Headquarters. How had this all happened? She had lived it, but still it did not seem possible. She allowed her thoughts to drift back fourteen years to 1999.

The IEA-endorsed candidate for Illinois Governor in 1998, George Ryan, not only won, but he also immediately made good on his education promises. As the state's economy continued a pattern of steady growth, the Governor added 51% of all new tax revenues to education in his budgets. State government in Illinois finally was supplying the lion's share of total education expenditures in the state. Some hope existed that tax caps would eventually be lifted. Tax credits for private schooling were passed but they were modest and because the total education pot was growing, the impact was minimal. Test scores were rising, as were member salaries. Learning standards and accompanying rules and regulations finally were in place. There was much cause for optimism as the IEA looked to the future when the new millennium began. The general educational environment was very positive and supportive. Thomasina, for the thousandth time, regretfully paused to take note of the early warning signs that she and others had not heeded.

She pondered the years 2000 and 2001 when fair share memberships began to increase. In 2002, when the total membership of the IEA declined slightly, it caused but a minor stir as members of the IEA Board of Directors concluded that growth could not be perpetual and that a leveling off phase was inevitable. The need to reach out more effectively to young educational employees had been

discussed, as had the concept of making the student program an organizational priority, but neither resulted in any real action. From the recesses of her mind, Thomasina heard the crusty voice and strong words of IEA Board Member Tom Marin as clearly as she had in May of 2002 when he had spoken them. His tone had been almost scornful as he lectured his concerned colleagues about how markets rise and fall, and how all things move in cycles. He advised, be happy. Don't worry!

The start of the new millennium was an exciting period for education in Illinois. Innovative approaches in the schools were becoming the norm. Thomasina frowned as she remembered how easily the IEA had been caught up in its own success. As gains in the areas of school reform, funding and student achievement occurred, IEA leaders across the state were proud of their accomplishments and relieved that so many others had begun to follow their lead. She swallowed hard as she confronted, for yet another time, the reality that success in the late 1990s had most likely blinded her and others to problems that were approaching from the future at the speed of light.

Rapid change fueled by increased dollars occurred in curriculum, school organization and in partnerships with business. This caused members, particularly young ones, to develop greater levels of dependence upon administration as one initiative after another was launched. As president of a large suburban local, Thomasina recalled a rep meeting in the fall of 2003. As she was exhorting reps to help her fill committee slots to revitalize the association's program, she had been all but shouted down as rep after rep explained in detail how their jobs were changing. Integration of technology into instruction; adjustments to new curricula in reading, science, math and social studies; and partnership team planning and coordination were among the more than fifty specific items listed by the assembly. Their point was unmistakably clear. Members had no time for anything additional. They were in a personal/professional survival mode. Changes in the nature of educational support positions were at least as significant as for certified positions. The roles for everyone in the educational environment were expanding and changing remarkably.

Members also became less concerned with contractual issues and protecting their own rights as a spirit of collaboration and progress permeated their environment. As the positive results of their work were acknowledged publicly, and respect and support of educators grew, members became more willing to voluntarily waive their rights and take on vast new areas of responsibility. Local association leaders found it increasingly difficult to monitor and effectively evaluate the changes taking place within their districts. With more than a hint of uneasiness, they began to nod somewhat approvingly as things whirled around them. They knew that collaboration and cooperation were the very concepts that created much of the positive educational change. They also feared that they might appear to be blockers to progress.

When the merger of the AFT and NEA finally occurred in 2002, the IEA made serious attempts to structure an agreement at the state level that would be acceptable. Extended talks finally broke down in mid-2003 over issues of AFL/CIO affiliation and governance structure. The parties agreed to attempt a unity without merger approach in which they would collaborate and coordinate efforts whenever possible, but would maintain their independence from each other. In a rapidly changing environment, one of the constants seemed to be the nature of the relationship between the IFT and IEA. Their contrasting styles, constituencies and interests simply made for a tenuous relationship punctuated from time to time with episodes of irritation and friction.

As early as 2004, nagging organizational problems emerged. Increasingly, local leaders and field staff members were finding it difficult to maintain strong locals. With strikes all but obsolete and contract enforcement no longer fashionable, the powerful forces of solidarity that had marked previous decades had all but evaporated. Many of the thousands of new members streaming into Illinois schools seemed to lack interest in the association and its activities. The collective IEA response to all of these developments was one of concern as it expressed resolve to work a little harder. A trusted success formula had been created over the years. It needed to be followed more diligently.

A year later, when it was rumored that some locals were experiencing de-certification rumblings, the concern increased, but direct efforts to deal with the issue did not result. The IEA Board at its October meeting of 2005 had discussed how best to deal with the issue. Board consensus was that UniServ staff and local officers needed to deal with the problem locally. Tom Marin, Thomasina recalled, had helped the group conclude that the problem was rather limited relative to the size of the IEA. The board reaffirmed the need to work harder at those things that had made the IEA so successful.

Thomasina closed her eyes as she searched deeply for an understanding of why the association leadership at both the state and local levels had reacted as they had to the young people pouring into the profession. She remembered how they used to shake their heads, and sigh or mutter comments under their breath about "kids these days." They had tended to look at the newcomers as being less than appreciative of all the wonderful advantages that had been secured for them in hard-fought battles over the previous three decades. They seemed so naive and so willing to surrender not only their own rights but also those of others in the workplace.

At best, new members seemed unwilling to become involved in association work, and at worst, openly hostile to the association. As the generation gap widened, it manifested itself through a variety of issues. From salary indexes to seniority matters, members of differing ages found themselves at odds with each other. The IEA and its locals tended to stick with its traditional approaches to issues. In the minds of new members, the IEA and its locals clearly came to be seen as being owned and operated by older members. These newcomers were

generally not particularly concerned about bread and butter issues, but some of the comparisons with more experienced teachers' salaries did bother them. One young man stood at a contract ratification meeting in Thomasina's local and proclaimed that while money wasn't everything, what he saw before him was ridiculous. Thomasina whispered to herself, why had they not taken the time to listen and to think? The image of a school staff room in Moline flashed into her mind's eye. Two veteran members were commiserating about only being allowed by law to shelter \$13,000 of income per year in 403b accounts. A young teacher seated nearby glared at them with disgust in her eyes as she audibly whispered that \$13,000 was almost half of her gross salary. The two veterans turned, looked at her, and shrugged their shoulders. Thomasina often thought about how that episode, witnessed eight years ago, symbolized so much about how older and younger members related to each other in those critical years.

When increasing numbers of members asked that their IPACE contribution be returned, only IEA Government Relations was particularly upset. Association leaders took this as yet one more indicator that young members were not willing to shoulder responsibility. Many IPACE-endorsed candidates were doing well at the polls, but because education was generally well supported, this all seemed to matter less than it would have in the past. Education was no longer a hot political topic. Mike Kent, IEA Director of Government Relations and a gifted speaker, repeatedly warned and cajoled others to action, but even his substantial talents were not effective. The IPACE contribution was reduced to \$15.00 in hopes that members would find it more acceptable. They didn't. Larger and larger numbers of members saw political action as crude strong-arming that was no longer necessary or civilized.

When Chicago reform efforts collapsed in 2006, the General Assembly made sweeping educational mandates for the city schools. The legislation only pertained to Chicago largely for two reasons. One reason was the general consensus around the state that educational reform and progress was fair to excellent outside of Chicago. The other equally important reason was that the IEA bipartisan approach to politics employed over the years helped to significantly head off those very conservative legislators who would have applied these laws much more broadly across the state. All of this transpired with IEA members pretty much detached, feeling neither threatened by these events nor appreciative of the efforts of the IEA Government Relations Department.

By 2006, some locals were experiencing difficulty filling officer slots. These locals were running out of steam as veteran leaders and stalwarts retired and no one moved into their places. In some cases, nominal leaders were elected with an understanding that their responsibilities would be very limited. Frequently, inexperienced leaders assumed office with little or no understanding of the association, its culture or its mission. UniServ staff found it almost impossible to work with local leaders in many areas of the state to even enforce contracts, process grievances or to engage in real bargaining. In some locals, leadership became very cozy with administration and the school board. In most of these

cases, not much attention was paid to the few veterans who complained about the “company union” and the apparent lack of advocacy by the association.

It was as if the very changes for which the organization had longed and toiled became overpowering. These changes took on a life and direction of their own. The IEA finally succeeded in gaining funding and a focus on children, but mysteriously, others had moved into the drivers’ seats of the change vehicles and went racing off in all directions, leaving the IEA standing in their dust somewhat befuddled. For example, corporations like Motorola were spending significant sums in both public and private schools and their influence over school programs and curriculum was rising. Thomasina chuckled to herself as she remembered how they always used to say that they had to be proactive. Given the circumstances, organizational structures, resources and strategies existing at the time, they did not have a prayer of being adequately reactive, much less proactive. As home schooling partnerships, private/public learning compacts, virtual classrooms, and a myriad of other new structures sprung up seemingly overnight, even the task of identifying who was a teacher and who was eligible for membership became problematic.

As quality and accountability became firmly established as central issues in education, differences between older and younger members were more than obvious. Association leadership, predominately populated by more senior members, were somewhat progressive in their attitudes about change, but older rank-and-file members were relatively uncomfortable with and resistant to new quality and accountability demands. Younger teachers were generally more receptive. This created a dilemma of sorts for local leaders. Their most supportive and connected members seemed to be on the wrong side of these important educational issues. The net effect was to stifle decisive actions by association leadership at the very time internal change was of the essence.

By 2008, public confidence in Illinois’ educational system was very high, but the IEA was beginning to really struggle to maintain its membership, programs and political influence. Member salaries had leveled off and were nearly at a standstill. The increase in educational employee salaries over the last few years led Boards of Education and school administrators to conclude the matter resolved as they moved on to other issues. In districts all around the state, salary indexes were being replaced with performance-based arrangements. Many members not only felt less need of protection, but also came to see the association as unable to protect them or to effectively represent their best interests if the need should arise.

Thomasina breathed a sigh, and thought back to how miserably they had failed to see the differences among the young people filling their ranks. They had mistakenly painted them all with one brush. In fact, she concluded that they were much more differentiated in their tastes, viewpoints, attitudes and styles than previous generations. With scores of TV channels, the vast niche offerings of the internet, and in hundreds of other ways, the homogenizing cultural forces of the

20th Century had been fractured. These youngsters were more inner-directed and independent than Thomasina's generation had been. Just because they were not like us, we concluded somehow they were all alike. She mused at the folly of trying to find the set of items that were important to these newcomers. Because they had attempted to reach all of them with one message, they had reached very few of them.

She thought of a number of young teachers she had known who were of a fabric that would have made them organizing pioneers in decades past. Unfortunately, they did not see the IEA nor its local affiliates as the means through which to address their concerns because the structure and function of the IEA was still geared to those bygone battle years. A few notable exceptions existed in locals where talented young leaders had emerged from the IEA Student Program and restructured their locals into effective organizations capable of translating member concerns into actions and programs. A handful of experienced and enlightened local leaders also had made a concerted effort to welcome and mentor new leaders, but the larger organization failed to capitalize on these examples. Thomasina was absolutely certain that at least 10% of the new members over the last decade had been potential association leaders who had not been reached.

Another significant group of these young members came into education with a well-defined sense of what they expected from their profession. In some ways many of these were deferential to authority, but very demanding when their expectations were not met. Thomasina reflected upon how they had looked at this deference with disdain, and their demands as nothing more than the selfish tantrums of spoiled children. Thomasina, a younger baby boomer herself, regretted how profoundly she and her contemporaries had failed to come to grips with the reality that their watch was ending. If only they had heeded Stephen Covey's teaching, to seek first to understand and secondly to be understood, things might have been so different. How much better might they have coped with the last decade if these young people with their new perspectives had been accepted as full partners in creating a new future?

Thomasina's thoughts then returned from a world of paths not taken to the reality of those chosen. They had not listened nor understood. Their actions had not been appropriate. For example, the revamping of the UniServ program to place a greater emphasis on organizing efforts had missed the mark. Most of the techniques and messages employed were the same as those that had been successful in the 1970s. They did not resonate.

In 2010, a disturbing number of locals left the IEA. It seemed that no one event precipitated the exodus. It seemed more that many individuals were concluding that the association was no longer relevant or necessary. Why pay the dues? New independent unions and associations popped up in many areas with a limited purpose and scope, and with very low dues. Frequently, administrators were actively involved in leadership roles.

Thomasina felt the lump grow in her throat as it always did when she thought about the 20% staff reduction she faced next year in 2012 if something extraordinary did not occur. The IEA Representative Assembly's move to cut dues by \$20.00 had not stemmed the tide of membership losses. It had simply meant less dollars from fewer members. The activists at the core of the IEA were embattled and embittered. Thomasina feared that infighting and finger pointing would eventually consume their remaining energies.

Thomasina's headache throbbed at her temples. The utter confusion that existed in the IEA seemed impossible to quell, but she and her team must find a way to do so. After all, a few short weeks ago, as she had campaigned for office, Thomasina had confidently promised to bring the organization back together as Reg Weaver had done many long years before. In that moment, however, even the perch from which she sat to view the former home of the IEA seemed at risk. She wondered, how many IEA members at this point even would know Reg Weaver's name?

She had already taken the first steps of what she hoped would be the beginning of IEA's rebirth. In running for office Thomasina had shared her view of the past with anyone who would listen, and it played very well with a broad cross section of the membership. She chose to view her overwhelming victory as a mandate to act.

She had already convened a task force that represented all constituencies of the IEA. She had given it a charge to look forward, study and offer recommendations on how to reconnect with members, reestablish an effective grass roots political capability, and to create an organizational structure that would bring about a listening and learning organization. She had instructed the group to analyze the key factors and driving forces that would impact the Association in the years to come. She had worked with this group to identify which of those factors were most critical and most uncertain. From these, they had created a few alternative sets of possibilities, which were crafted into simple plot outlines. These stories were written and refined. Thomasina was prepared to share them throughout the organization in an effort to stimulate *strategic conversations* about how to rebuild the IEA.

It was too soon to predict success, but Thomasina felt these scenarios would provide a *wind tunnel* in which to test ideas and options. She smiled as she caught herself thinking of the future in terms of the potential rather than fear. These truly were interesting and challenging times.

### *Implications of Rollin' Along Scenario*

- Listening closely and responding to members' concerns are key
- Need to understand and reconcile differences among members

- Provide clear rationale for membership
- Bargain skillfully for greater flexibility in members' contracts
- Educate members to deal with stress and change

### *Leading Indicators of Rollin' Along Scenario*

*The following future developments could indicate that this scenario is becoming reality:*

- Increase in fair share members
- Decrease in IPACE contributions
- Decrease in arbitration agreements activity
- Whining about IPACE at RA meetings
- Newcomers with ideas and proposals easily dismissed by IEA leadership
- New members being more assertive at RAs—and ignored
- Changes made in contracts to reflect new member concerns
- Widening gap in distribution of members vs. convention delegates
- Polls show high public confidence in schools
- Local difficulties in filling association leadership and participation functions
- Rise in percent of eligible members who choose to retire (controlling for incentives)
- IEA staff put job security high on list of concerns in negotiation with IEA
- Increase in smart-ass write-in votes
- Decrease in candidates seeking IEA endorsement
- Decrease in percent of members who report in post-election polls that IEA endorsements influenced their vote
- Dramatic change in strike activity
- Decrease in attendance at IPACE endorsement meetings
- Decrease in locals asking for IPACE money for local races
- Decrease in requests to UniServ for service

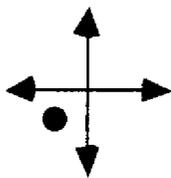
- IEA not invited to major event on education in Illinois—“We forgot”
- Disputes over dues
- UniServ Directors

### *Strategic Options of Rollin' Along*

*To survive and thrive in this scenario IEA might:*

- Develop learning communities to ensure classroom success and help survive speed of change
- Increase leadership development and recruiting efforts
- Create an ongoing training program for local leaders
- Hold focus group interviews among new and young members
- Launch more local history projects to honor the past and embrace the future
- Modify organizational structure to better meet member needs by:
  - Creating partnerships between members, staff and managers at all levels (Saturn)
  - reforming governance structure
  - consolidating locals to create sufficient resources for programs
- Expand the training department to train administrators (Joint Training)
- Create special programs for newer members, such as:
  - mentoring programs
  - newsletter for new members
  - training and how to go through evaluation
  - interpersonal skills for organizers, local leaders and staff
- Make training activities count for re-certification
- Integrate technology into business of the association
- Free up resources for training
- Take risks and trust instincts
- Grow membership in order to increase resources

## Scenario Two: Beat Up



- **Hostile Political Environment**
- **Disconnected Membership**

*At the height of organizational success, the Illinois Education Association is hit with a combination of economic and political reversals and growing public unrest with the course of school renewal. In this declining situation, the IEA agrees to a merger with the Illinois Federation of Teachers and to frontally challenge the political right. Intense polarization of the external and internal political landscape results initially in a divided membership and ultimately in a rupture of the organization that leaves educational employees without an effective voice in Illinois.*

Juanita Hildago, a 28-year-old teacher assistant from Bensenville, became the 100,000<sup>th</sup> member of the Illinois Education Association. Honored at the 145<sup>th</sup> IEA Representative Assembly on March 4, 1999, she said, in brief remarks to the 1,002 assembled delegates, "I am proud to be a member of the IEA. My union cares about kids. My union cares about me." From the cover of the April issue of *The Advocate*, Juanita's picture proclaimed the unparalleled success of the largest school employee organization in the state.

Juanita symbolized that success. For the 15<sup>th</sup> consecutive year Association membership had risen. ESP membership now constituted 15% of the Association and was the fastest growing constituency in the education family. K-12 teachers, higher education staff, students, and retired members all contributed to an IEA committed to growth and diversity.

The 1998-99 school year was Juanita's fifth as a teaching assistant. Two years earlier, she and her husband, Jaime, moved from Chicago where she had been employed by District 200. They made the move when their daughter, Marti, was ready to start school. Juanita was hired by Bensenville District #2 in a transitional 3<sup>rd</sup> grade class. Her work with children with limited English proficiency excited her. She knew how difficult life could be. She wanted to use her skills to make it easier for others. She believed in education.

Juanita was warmly welcomed by her teacher-partner and others in the building. She was invited to join the Association, but declined. Money was tight at home.

That first year at Bensenville was a golden time. Marti flourished in Kindergarten. Juanita loved her kids. As time went on, she determined that next

year she would join the Association. Her colleagues were good people, doing good work, and they deserved her support.

1999 was a good year for IEA too. Membership was up — again. Earlier, *Education Week* cited the Association as a prime example of NEA affiliates employing a bipartisan political strategy to advance public education. Victory in the '98 elections vindicated that strategy.

George Ryan became Governor in January 1999, and IEA was at the center of decision-making. Determined to be the Education Governor, Ryan sat down with the Association after his election and developed an agenda to increase school funding and to renew Illinois schools. At the 1999 Representative Assembly, Ryan committed to working with the Association in a "Grand Partnership" to make Illinois schools "the finest in the nation." Upon leaving the stage, Governor Ryan greeted Juanita and raised her hand in triumph.

In Ryan's first year in office, he delivered on his promises. School funding increased by more than \$500 million. New teacher certification standards were enacted. The Governor replaced several members of the State Board of Education, oversaw the selection of a new State Superintendent, and invited the Association to work with the Board on revising the state academic standards, which would be "a beacon of quality education for all of our students."

Delivering on these promises in the legislature was not easy. The education agenda met with opposition from ultra-conservative Republicans as well as some Democrats who wanted the IEA to know how they felt about bipartisanship. Ryan effectively used his position to thwart the Fitzgerald wing of the party and reached out to pro-education legislators of both parties. The IEA and public education reached a high-water mark in the Fall of 1999.

The exact moment when things began to slip to is difficult to pinpoint. The inability of the G8 nations to deal with the Asian economic crisis could be considered a leading candidate. For more than a year, the Dow bounced between optimism and doubt. The crash of the Indonesian markets and another wave of Japanese bank failures in late 1999 cracked the dike. Investors lost faith in the face the economic tsunami.

In the United States, interest rates rose. Employers tightened the purse. Illinois, always slow to feel the tugs of international economics, produced a budget in Ryan's second year with modest growth for schools. By the winter of 2000, however, it was clear that state revenues were leveling off and those who predicted they would decline would subsequently be proven right. It would be many years before Illinois schools would again see overall growth in their revenues.

Another factor was the Chicago school crisis of 2000. The state's ISAT tests showed that the proclaimed success of the Chicago reforms did not translate into improved student achievement. For weeks, headlines and editorials from the

*Tribune, Sun-Times, Daily Herald, Southtown,* and a myriad of downstate papers decried the failure of public schools.

Mayor Daley, bowing to pressure from the business community, went to Springfield seeking to curtail the power of local school councils and to centralize more school control under his office. A deal was struck between the Governor and the Mayor on the Peotone airport, a new stadium for the Bears in Arlington Heights, and authority for the Mayor to circumvent tenure and certification laws for Chicago teachers.

Announcing that "the dance of the lemons is over," the Mayor ordered an end to the relocation of unsatisfactory employees. A comprehensive testing program for all teachers and administrators was instituted. In the spring of 2001, he announced that 327 teachers and 57 administrators would not be rehired, setting off waves of protest from the Chicago Teachers Union. Daley responded by announcing that Chicago would institute an emergency certification program, filling vacancies with "competent caring people with real world experiences."

The CTU denounced the move, but with no clout, played the only card it had. In private overtures, the CTU requested a merger with the Illinois Education Association.

The IEA rebuffed the move.

The Association had other problems to contend with. Perception of public education was again spiraling downward. The Chicago fiasco painted all schools with a bad brush. Local bargaining was strained as the economy weakened. The 23 strikes in the Fall of 2001 were difficult and led to a call for the repeal of collective bargaining by a group of conservative Republican state senators called "The Righteous Seven." This faction had secretly organized to stem the drift to the middle by the Republican Party. They voted in concert to leverage their influence and raised political funds to finance conservative candidates in the elections of 2002 and beyond.

In addition, the legislative redistricting completed in June 2001 resulted in the loss of two more downstate congressional districts and in a state legislative map guaranteeing continued Republican domination of the Illinois political scene. The elections of 2002 would be a major priority for the Association.

Whatever the trigger point for the descent in the fortunes of education and the IEA, there can be no question that a major event before the fall was the unexpected decision by George Ryan not to run for re-election in 2002. The decision caught everyone by surprise.

Ryan was a popular, if not charismatic leader. He worked well with both sides of the aisle. So expected was his re-election, that no major Democratic candidates had begun any serious exploratory efforts or fund raising for a

gubernatorial campaign. Patrick Quinn, considered the leading Democratic candidate, was viewed by many as a sacrificial lamb. Glen Poshard was looking to test the waters again, buoyed by the narrow margin of his defeat in 1998.

Caught even more off guard were potential Republican candidates. None had contemplated a run, except for "The Righteous Seven." This group had quietly worked with Senator Peter Fitzgerald on a Fitzgerald challenge to Ryan in the 2002 Republican primary. They knew he would have the safety of remaining in the US Senate should the effort fall short. Should he succeed, however, Fitzgerald would grab the reins of power in the state and appoint his successor to the Senate, keeping it safely in conservative hands.

The Election of 2002 was a disaster. Peter Fitzgerald was elected governor in the closest race in Illinois history. Democrat Jesse White, who jumped into the race at the last moment to mobilize his party, closed rapidly in the final weeks but could not overcome his lack of resources, or Fitzgerald's promise to get rid of the property tax. Fitzgerald-backed legislative candidates also won several key victories. In the veto session, Fitzgerald supporters attempted legislation to prohibit labor organizations from collecting PAC monies. After passing the Senate, the bill was killed in the House by a parliamentary move that kept it from being heard.

Governor Fitzgerald, in his first public address, promised a "renaissance of public virtue and private education." He called the legislature into special session in January 2003. Citing decreasing state revenues, declining test scores in the city and stagnant scores elsewhere, he urged passage of a tuition tax credit bill that "would empower parents to do what is best for their children." With the support of conservative Republicans, Minority Leader Madigan and Mayor Daley, the legislation passed by a single vote in each chamber and was immediately signed into law. A bill to repeal tenure rights similar to that approved for Chicago was narrowly defeated.

Energized by his unexpected political good fortune, Fitzgerald used his office as a bully pulpit. He denounced teachers' unions for standing in the way of school children. He excoriated Chicago teachers who failed their competency tests and cited the extraordinary efforts of the CTU "to keep incompetents in the classroom." He promised to raise funds and to vigorously campaign for legislators who would stand up to the tyranny of unions.

In the regular session of the General Assembly, Governor Fitzgerald secured legislation tying re-certification standards to student performance. Even friendly legislators could not withstand growing pressure "to do something about our schools."

The Association was on its heels. In the deteriorating political and economic climate, wolves surrounded the wagons.

ISAT scores released the following year showed a continuing slide in Chicago. As unemployment gripped the city, the social fabric was unraveling. In the rest of Illinois test scores, on average, dropped too. Reading scores were lowest since the advent of state testing.

Over 100 Chicago schools were placed on the Academic Watch List. A rising number of downstate schools joined them.

Contract settlements for the third consecutive year were difficult. Under increasingly hostile conditions, teacher and ESP retirements reached record proportions. Many districts did not re-hire the positions. ESP ranks were thinned as districts tried to balance their waning budgets. For the first time in 17 years, IEA membership declined to 102,000. The Association faced internal budget cuts. Government Relations was on full alert for the next Fitzgerald salvo.

But perhaps the cruelest turn of all came from the U.S Congress, which, faced with a budget crisis of its own, slashed federal funding for special education programs in the fall of 2002, telling states and school districts to ration special education services for only the neediest. Parents of special education students demanded that school boards make up the difference in funding despite tight local budgets, but parents of other students pushed back with equal vehemence. Why should their children's education suffer to pay for kids who cost more than four times as much money to support? Teachers were caught in the middle of this nasty debate, and were bitterly divided on the issue among themselves. In some school districts, Board members focused the debate by pitting teacher pay raises against maintaining support for special education students.

When the IFT appealed again for a merger, the Association agreed to listen. Cooperation between the two unions on the White campaign had softened some of the rancor. Nationally, six NEA state affiliates were now merged. Clamor for a national merger was growing. It was only a matter of time. IEA leaders determined that now, while the CTU was desperate and in disarray, was the time to merge rather than being forced on them under less desirable conditions.

The Representative Assembly approved a merger in March 2003. The Constitutional Convention that followed was dominated by the CTU speaking with a single voice. Disparate Association locals did not come to terms with their differences. With no viable alternative, the new merged organization, Education Illinois, assumed a disappointing life of its own in 2004.

From the beginning, EI was star-crossed. The clash between governance factions and the two staffs resulted in innumerable problems. Focused internally as it was, the organization did not see the backlash to merger that came from locals.

Scores of small downstate locals jumped ship first. Incensed at "being forced to join the AFL-CIO", they withdrew from EI and went independent. Two counties in central and west-central Illinois formed county-cooperatives to pool their resources as independents. Seeing the developments, the Bloomington Education Association and the Normal Unit Five Associations withdrew from the EI, merged their locals, and hired their own UniServ Director. The Rockford Education Association soon followed suit along with the Elgin Teachers Association and Lead 300. They signed a mutual cooperation pact to work together as "independent but cooperative entities." In southern Illinois, a "New Southern 45" was organized. While not wildly successful, 1,100 former Association and Federation members gave it their money and loyalty.

The EI appealed to the national for monetary assistance to stem the financial bloodletting. Even with the help, the EI found it necessary to reduce costs. Eligible staff was forced into early retirements. Less senior professional and associate staff members were rified. EI's ability to contend with outside forces was compromised and rapidly deteriorated.

On August 31, 2004, EI membership stood at 132,000, the largest school employee union in state history. Yet, the merger resulted in more than 35,000 school employees going elsewhere. The bulk of those who left were former Association members. With their departure, the power of the IFT element grew. A focus for the new organization emerged.

Fitzgerald's efforts to shift the party right, President George Bush Jr.'s demolition of the Department of Education, and the emergence of a CTU-dominated leadership within the EI made a bipartisan political strategy untenable. EI set a new course.

They took on the Republican Party. In the elections of 2004, not a single Republican was endorsed by EI. Democrats who would not swear allegiance to the property tax, collective bargaining, and the Scaffolding Act were not supported either. Forty-three of the 82 endorsed candidates were elected that November.

Luck attached itself to the Fitzgerald administration. Unemployment figures announced six weeks before Election Day decreased for the first time in three years. State revenues were projected to rise 5% for the coming fiscal year.

Republican majorities increased in both chambers of the General Assembly. With the polarization between Education Illinois and the Republican Party, the Fitzgerald agenda for 2005 was electrified. The Governor proposed to eliminate fair share provisions (growing numbers of younger educators embraced the idea), to disallow payroll deductions for political action contributions, to outlaw school employee strikes, to extend tax caps statewide, to place certification standards in the hands of local school boards, and to require English-only instruction. In each instance, he succeeded.

Seeing an upturn in the state's fiscal situation, he also secured passage of the School-Business Technology Partnership Act, granting venture capital development funds to corporations building distance learning capacity for public and private schools. Education Illinois opposed the bill.

In a turn of strategy, the Fitzgerald administration did not attempt to eliminate collective bargaining rights for school employees. Political strategists for the Governor concluded that keeping unions occupied with bargaining kept them from concentrating on political action, school reform, and larger social issues of concern to the Right.

In the bitter political environment, education employees were divided. The Professional Educators Organization formed in the aftermath of the IEA/IFT merger. With the 2004 election debacle, it experienced an upshot in membership. Encouraged by early success, PEO added organizing staff, many of whom were former school administrators moonlighting in their early retirement years, and began an aggressive campaign to raid EI locals and to court the former IEA locals that went independent. By the end of the 2004-05 school year, PEO had more than 23,000 members. From many quarters, it received a positive response to its call for "local autonomy," "professionalism not radicalism, cooperation not confrontation" and "cheaper dues."

A study, financed by the right-wing think tank, "New Millennium," found that the average age of PEO membership was 31.4 years, while Education Illinois stood at 42.7. Fitzgerald liked the shape of the future.

More than 200 former Association locals went independent. They were immune to appeals to rejoin the Union Family. Put off by internal EI fights and escalating dues to offset EI's financial reversals, these independent locals were content to stay out of the fray.

Over each of the next two years, EI suffered continuing membership losses. Statewide membership fell to 113,000.

To rally working people and protest mounting legislative losses, Education Illinois called for a statewide strike of all educational employees for October 15, 2005. A crowd generously estimated at 2,300 rallied in Springfield to thunderous speeches from EI and AFL-CIO leaders and State Senator Vince Demuzio. News media estimated that fourteen school districts closed for the day to honor the strike.

Chicago media covered the rally including excerpts of speeches and interviews with local leaders in attendance. Leaders demanded the end of tax caps and the implementation of another Early Retirement Option. Several TV stations provided footage of local community groups that staged counter protests in opposition to the strike. At one of the rallies, the President of the PEO deplored the strike and called EI leaders out of touch with the public.

In the ensuing session, Governor Fitzgerald proposed legislation to break Chicago into 12 independent districts. Over EI opposition, the measure passed handily. All Chicago teacher contracts were nullified. Education Illinois dropped below 100,000 members by August 2006.

Political pundits, analyzing the General Election of 2006, concluded that educators played “no significant role” in deciding the key contests. Opposing candidates claimed to be “education candidates” and bolstered their claim with an endorsement by some education group.

For the first time in years, school felt the pinch of teacher shortages. The toll of staff cuts, reduced teacher training enrollments, increasing retirements, depressed salaries, and the general languor that settled over the profession aggregated to the point that numbers of districts reported difficulty in filling certain vacancies.

A cacophony of educator voices disagreed over critical issues. They disputed how children learn. Supporters of multiple intelligences battled those who favored “skill and drill” instruction. Some hailed “English Only” instruction, others denounced it. Whole language enthusiasts attacked phonics advocates and vice versa. Year-rounders, charter schoolers, and cultural diversity proponents argued endlessly with defenders of the status quo. In the widening tumult, Education Illinois had neither the energy nor the resources to attend to these problems. The lack of consensus confused and angered the public and the General Assembly.

To address the dilemma, Governor Fitzgerald proposed funding for children schooled at home. He called for the creation of a Home School Network to connect home schools so they could share resources and reduce costs to taxpayers. He called for tax breaks for corporations donating technology to private and home schools to facilitate the network. The legislature agreed to the tax breaks. They appropriated \$2 million for Home Schooling pilot projects in DuPage and Lake Counties, a beachhead that grew to more than \$20 million in four years.

Restlessness within the ranks of EI mounted. Complaints about the lack of service were voiced. A staff strike in September of 2007 did not help.

The bi-annual state convention in 2008 was an ugly scene. For the first time, delegates spoke of merger with the PEO. They were shouted down in the ensuing debate. Leadership of the union was challenged, but the Solidarity Caucus squelched ineffectual opposition candidates. Tighter Receivership Guidelines were established to contend with increasingly hostile locals. The strategic plan adopted by the convention declared the number-one organizational priority to be “creating a Democratic majority before the legislative map is redrawn in 2013.”

The hope of a single voice speaking for all education employees was further from reality than ever before. Illinois educators splintered into three camps. Education Illinois continued to be the largest, although it was losing ground every year. The Professional Educators Organization represented more than 28,000 members and was growing. Independent and non-represented school employees numbered more than 60,000.

Educators were divided by more than organization. They were divided by their vision of public education in America.

By 2010, EI membership slipped to 87,000. For the first time since 1999, Juanita Hidalgo was not one of them.

Over the years, Juanita had gone back to school at night and in the summer to earn her degree. She wanted a class of her own. She received a Ryan grant and took a year's leave to complete her degree and to do a residency to meet the certification standards that many suburban schools demanded. Cutbacks reduced the job possibilities in Bensenville. The district no longer offered bilingual instruction. Spanish classes were delivered by satellite directly from Costa Rica through the Tribune Corporation's Foreign Language Broadcast Service.

In the summer of 2010, Juanita received her degree and took a job in Puffer Hefty School District # 69. She did so with mixed emotions. She hated to leave her friends in Bensenville; they had been very supportive of her. She was not excited about the pay in Puffer. With their differentiated salary schedule, she would make barely more than as an assistant in her old school. But she would have a class of her own and she could teach. That was all she ever wanted to do. And she would join the Puffer Independent Teachers, Inc. (PITI). It was not an active organization, but it was the only game in town.

### *Implications of Beat Up Scenario*

- Chicago is critical to IEA; city reforms ultimately affect downstate schools
- Media coverage of Chicago schools colors public perception of all Illinois schools
- Governor Ryan must come up with new strategies
- IEA loses clout in legislature
- Tuition tax credits take money out of public education
- Public school attendance declines
- Teacher dismissals in Chicago

- Those interested in learning teams, etc., must take their concerns elsewhere
- More home schooling
- School boards and administrations bring in non-teaching personnel to do our jobs
- Voluntary exits of teachers from profession—those that stay feel disenfranchised
- Rise of alternatives to IEA—boutique unions
- Merger diverts attention to internal issues
- IEA in survival mode

### *Leading Indicators of Beat Up Scenario*

*The following future developments could indicate that this scenario is becoming reality:*

- Downturn in economy
- Right wing caucus emerges in Illinois legislature
- Right wing running non-moderates in primaries
- Opposition to Ryan in Illinois House
- Illinois Democrats evidence frustration with slow pace of school change
- National trends, e.g. Bush over Gore
- Voter apathy
- Drastic slide in SAT scores
- More schools reconstituted in Chicago
- Parent revolt
- Redistricting in 2001 favors Republicans
- School employee retirement rates and other turnover indicators rise unexpectedly

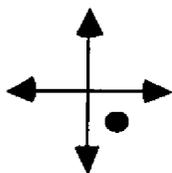
- A rise in the animus surrounding political decision-making in the Association (RA budget debates, strategic planning, etc.)
- Relationships between the Association and representatives of the business community become more strained

### *Strategic Options of Beat Up Scenario*

*To survive and thrive in this scenario, IEA might:*

- Learn from history of other states:
  - Wisconsin
  - Michigan
  - Texas
  - Georgia
  - Washington
  - Missouri
  - Florida
- Strengthen relationships with Senate Republicans
- Listen harder to the membership
- Develop quality education agenda with Ryan administration to change public image
- Make parents partners with us
- Make the business community partners with us
- Open up for discussion of sacred cows:
  - Home schoolers
  - Private schools
  - Tenure
  - Merger
- Define in advance conditions under which you would or would not merge
- Continue to build coalitions
- Work with Ryan to redirect ISBE
- Advocate for an elected state superintendent
- Engage in strategic conversation with our members using scenarios

## Scenario Three: The Young and Restless



- **Hostile Political Environment**
- **Connected Membership**

*This is a story about how the IEA underwent change and renewal in the face of a hostile environment. In response to pressure coming more from the corporate sector than from politicians or school boards, public education became accountable to demands that were easier for younger members to meet. New technology, and massive retirements of older members, transformed the IEA from an organization dominated by seniority to an organization dominated by the young and technologically hip.*

Who knew? How could we have known back in 1998 that the sense of solid support from the citizens of Illinois would turn sour so fast? Or that the rule of seniority would give way to the rule of technology? Otto B. Lesser knew. But in 1998 he was a young nobody. As he recalled those early years, it did not seem possible that the intervening time had gone so fast.

The IEA began the period with positive ratings from its members and a high degree of involvement. The organization's ability to change and adapt allowed it to retain the allegiance of a rapidly changing membership. It also enabled the organization to keep up—at least temporarily—with the rapid pace of change while maintaining the connection with its members it so sorely needed.

The Republicans won the Governor's office back in 1998 despite a closer than expected election. The close election allowed the Democrats to keep control of the House while the Republicans enjoyed a slight increase in their majority in the Senate.

Much of the early success of the IEA in the legislative arena can be attributed to the role the IEA played as a voice for public school reform. Progress in funding reform and school consolidation followed parts of the RISE program that passed in piecemeal stages over fifteen years. The most dramatic changes came in individual school districts through the work of the IEA affiliates. School districts accomplished dramatic change as central bureaucracies were flattened and school sites became the focal point for important educational decisions. Little did the union leadership suspect that these sought after structural changes would lead to their own loss of power.

The reform of public schools put a great emphasis on the school site. Dramatic changes came in individual school districts through the movement toward site-based decision making and shared decision-making. The concept was

to move decisions closer to the employees who must carry them out the while involving all stakeholders at the site in the change process. Decisions followed from a shared decision-making model while incorporating best practices into the teaching-learning environment. The impact was greatly magnified when both federal and state governments began to fund some educational programs through block grants directly to sites, thus bypassing the entrenched bureaucracy. Over time the results were impressive. Networks that the IEA had assisted, such as the Consortium for Educational Change (CEC), played an important supporting role as districts shared their experiences.

The movement toward site-based decision making and shared decision-making did not eliminate the role of the central offices nor did it eliminate the need for some of the contractual protections that had been won over the years of collective bargaining. However, this shift in the functioning of school districts proved to be a huge challenge to the delivery of services for the IEA. The process inevitably created conflict at the site that required interventions of training, facilitation and conflict management. The UniServ staff and local leaders played a role in this process but the organization, struggling to maintain its program, simply did not have the resources to work with every site that needed assistance. The training and organizational interventions had an important impact on sites and members saw this as crucial support from their organization. While the impact of the IEA on local sites was often slight, empowered members had much lower expectations from its state organization. Empowered sites saw problems as their responsibility and not the obligation of the local or state organization.

As a result, employees at the site began to split their allegiance between their union and their school administration. The majority of employees still viewed the union as essential to their well being while some (albeit a minority) sought the compliant role and gave their allegiance to the principal as their key to security and getting what they wanted. Some younger members sought alliances with local businesses, or with consortia set up by corporations like Motorola. Using the net, they found sources of funding, curriculum planning, and course materials. Like professors at research universities, some of these technologically literate new entrants to the teaching profession became entrepreneurs, more adept than their older colleagues at tapping grants and other corporate support. Otto Lesser was a star at this new game.

Under the pressure of increasing calls for accountability coming from the corporate community, bargaining proved to be a daunting task. Employees could count on little public support. Corporate calls for reform, and the public disenchantment with public schools, created pressure on school districts. Employee unions and school districts needed to find ways to settle their differences.

These pressures on both parties contributed to many districts utilizing a form of bargaining known as Interest Based Bargaining. The process had been developed initially from the Harvard Negotiation Project. Many school officials and union leaders believed that the IBB process produced a better agreement for both parties as well as increasing the chances of reaching a satisfactory agreement.

Nevertheless, during the early years of the new century, strikes began to increase slightly from the small numbers recorded in the late nineties. Whenever the delicate balance created by the pressures on both parties was upset, discontent and difficulty in reaching agreement resulted in strikes.

By the year 2002, the elections for the state legislature were conducted under the remapping plan drawn up by the Democrats. The Democrats increased their hold on the House of Representatives and made gains in the Senate, where the Republican majority was barely maintained. The Governor's office stayed Republican until 2006 when a Democrat finally won. The Democrats proved to be almost as difficult to deal with as the Republicans had been. They simply had different issues with the public school unions: *which* employee rights should be trimmed in order to maintain the momentum for reform of public education? One of the changes passed by the legislature allowed for advanced reduction of dues for those who objected to fair share. Many lower-paid employees elected this option as a quick one-third reduction in fees paid to the organization. The IEA suffered a ten percent reduction in revenue from this provision alone.

The loss of revenue could not have come at a worse time. The IEA faced a new challenge in the growth of other organizations that presented themselves as professional organizations as opposed to teacher unions. The threat gained momentum when the Professional Educators of Illinois hired energetic, articulate, young Mr. Lesser, who espoused an organization focused on professional issues and professional development activities. Lesser and his young cohorts wanted only a limited lobbying presence in Springfield. His support would come from the business community, not from politicians.

The IEA and IFT complained bitterly that PEI had little impact on legislation but simply claimed credit for efforts made by the real unions. Mr. Lesser argued that his organization provided only the services that members really wanted and those empowered members did not need an organization to hold their hands. His organization's dues were less than half of those of the teacher unions. The PEI and other such organizations were known by the unions as boutique organizations, but the low cost combined with a limited but focused role of the organization appealed to lower-paid employees and those who viewed those organizations as more professional. Lesser also galvanized support by promising to set aside a portion of PEI dues to create partially subsidized child-care centers for its time-stressed younger membership. By 2004, PEI membership had reached 5,000, and other similar organizations had siphoned off another 3,000 members from the two major unions.

Changes in technology had a substantial impact on the IEA. The ability to communicate broadly and instantaneously was a boon to the internal communications of the organization—especially for younger members who were used to communicating online. However, the ability of external forces to communicate with members created a real challenge. Those who opposed public sector unions could now reach members more effectively than through the old

direct mail efforts. Technology favored a new accountability called for by the corporate sector. Activities of the organization's officials fell under the immediate scrutiny of members by virtue of communications from those who saw themselves as watchdogs of the unions. In this environment, only an organization that lived up to its members' highest aspirations could survive.

With local and state associations focused on school change and reform, interest in a merger at the national level waned. As a result, the merger never happened at the national level. Some half-dozen states merged, but the AFT would not accept a model that was not essentially its own. The NEA moved forward into new unionism with renewed emphasis on service, empowerment and commitment to quality—a direction that played well with younger members and their corporate sponsors. These new approaches now seem to have been perfectly in keeping with the times.

The AFT, on the other hand, continued with a structure built on past notions of leadership. It seemed as though the members existed to support the elected office holder and the resources of the union were for the purpose of getting elected and staying in office. It was self-interest over service. The AFT experienced a slight but steady decline in membership with a growing part of their membership outside of the public schools. The structural model and culture of the AFT simply did not resonate with changes that swept through most organizations that survived this time of rapid change. It was a time for a commitment to service to the customer and empowerment of members—hardly the hallmark of the AFT.

Political hostility to employee rights, school reform and the growth of competing organizations all provided a hostile environment for the aging IEA and the aged within its membership. By 2008 the demographic profile of IEA's membership had shifted dramatically as waves of older members retired and newer, younger members entered the profession. These new members no longer had the same patience with a seniority system that had been taken for granted in earlier decades.

Back when the concept of a career meant something, young teachers accepted low starting salaries on the premise that, in time, they would rise through the ranks and, with the protection of a union with political influence, they would enjoy high salaries and good pensions in their later years. But the whole system of careers, seniority and tenure came to be regarded as anachronistic in a world where not even Japanese "salary men" could count on lifetime employment. From term limits in politics, to calls for re-credentialing in medicine and the law, to rapid turnover and re-education in high technology professions, the new pattern of employment featured "serial careers."

Most young teachers didn't plan on teaching for more than five or ten years, so tenure was not important to them. Rather than have tenure taken from them by hostile politicians, Lesser and the PEI offered to trade away tenure in return for performance-based pay and higher salaries for young stars.

To stem the tide of defections to PEI, the IEA had to act. In the years between 2008 and 2013, the IEA experienced the kind of revolutionary youth movement that some recalled as “the golden years” of 1969-1979 when a young generation replaced what they perceived as an older, entrenched leadership. As in days of yore, the old looked out of touch, and the young spoke with a new voice. And as had happened in the 1970s, when a sleepy professional association was transformed into a muscular union able to bargain for higher salaries and better working conditions, so this new revolution did not simply replace old folks with young Turks in the same old offices. No, the young brought in a new order with new priorities.

Not only was tenure an anachronism. So were textbooks. Technology had finally produced the Dynabook that Alan Kay had foreseen way back in the 1970s—the palm-top, lightweight, wireless unit that could display any text or graphic its user wanted. No more out-of-date history books. No more dog-eared hard copies. And no more isolated classrooms. Communications was a bigger story than “computation.” To an increasing extent, in more courses than just social studies, the “text” was people in communication with one another.

Groupware replaced the classroom for increasing numbers of home schoolers. IEA reached out to home schoolers and their parents by providing curricular aids and standards. IEA-approved programs guaranteed that home schoolers did not risk too much isolation or difficulty on re-entering the face-to-face mainstream of higher education and employment. Of course home schooling was, in some ways, a better-suited education than school for increasing numbers of telecommuters who rarely saw the inside of an office building just as they had rarely seen the inside of a school.

Just as healthcare had managed a massive transition from in-hospital to outpatient ambulatory care, so public education catered to “out-students” through home schooling and flexible schedules. Just as healthcare went from fee-for-service to managed care, so public education went through its own version of “managed education.” In place of the primary care physician who acted as gatekeeper sending outpatients to different specialists, so public educators took a leaf from the book written by special education counselors. The IEP (Individualized Education Plan) was no longer a stigma attached to the learning disabled. Now everyone had their own IEP tailored to increasingly sophisticated diagnoses of their skills and needs.

The revolution in health care was not the only harbinger of equally revolutionary change in education. Just as the airline industry had applied the mathematically sophisticated tools of yield management to its routing plans and reservations systems, so public educators now routed students through increasingly flexible and customized schedules. The school day no longer fell into fixed 45- or 50-minute blocks. Instead a more sophisticated approach to time manage-met optimized individual student needs against available resources, both online and offline, electronically and face-to-face, in groups from one to one hundred.

For teachers the new school day was far less exhausting. The variation in scheduling allowed for in-service training, collaboration, and even relaxation at crucial points in a busy day. But to achieve this new time management, minds had to change. Both school boards, principals, administrators and unions had to agree to junk their preconceptions about the boundaries over which so many past battles about speedup, productivity, and time-management had been fought.

Change, therefore, did not happen overnight. And there was some pain in the form of a voucher system. Under pressure from business interests arguing for “market mechanisms” in the “education industry,” the legislature passed a voucher bill in 2005.

The way the drama played out, nearly everyone had something to learn. Because they were able to get out from under the miles of education regulations on the books in Springfield, the voucher schools were first off the mark at experimenting with new approaches to scheduling, more flexible coming and going of students and teachers, and the extensive use of computing and communications software and hardware as aids to education. We all learned from the voucher schools that flexible scheduling enhanced learning. So far so good.

After a couple of years of experimentation, Otto Lesser and his troops cut a whole new image of the schoolteacher with beepers on their belts, cell phones at their ears, and the latest in displays woven into their high-tech clothing. They were “wired” into their students and each other through wireless communications. Although the entrepreneurial spirit of the Lesser crew never found its way into the ESP ranks of the IEA, the changes in the work place created by them had a significant impact upon the demands placed upon support personnel. Thus, ESPs tended to remain close to the IEA throughout this period, expecting traditional union protections as the environment around them was transformed.

Then, like folks who leave the big firm to start their own businesses, these new teachers discovered the joys of the fourteen-hour day. They spent more time on their own time, yes, but there was an awful lot of it! Their high-tech communications systems put them on very short leashes. They couldn’t get off the job, ever. And the way PEI was set up—as a professional association that had no time for lobbying or collective bargaining or grievances over working conditions—they found they had little recourse. PEI started losing members. They started coming back to IEA where they could get protection of their time, interests, and individual rights. Otto had something to learn: teachers need protection.

Finally IEPs for everyone and flexible scheduling entered the public schools, which had learned about their effectiveness. Otto Lesser and his troops had learned they needed protection. So in 2011, the IEA and PEI merged.

Suddenly the IEA had on its rolls another 9,000 or so young, technologically hip, highly committed teachers—or “educational entrepreneurs,” as some of them preferred to be called. They knew they needed a union, not just a professional association. They wanted political clout, and they were dedicated to

getting it. They didn't have much patience for the older IEA leadership, however, and in no time at all they were taking over many of the workgroups and committees in the IEA power structure.

Connected to the union? You bet! But not to your mother's union. These new, younger members wanted their own union, and they hastened to recast IEA in the image of PEI. They wanted merit pay, and a lot of it. They wanted online services, and they wanted them yesterday.

The IEA leadership of the late twentieth century got its wish: waves of new young members closely connected to the union. But that aging leadership came to honor an aphorism by contemporary artist, Jenny Holzer: "Protect me from what I want." By 2013 the IEA was a thriving union/professional association with thousands of members prepared to (wo)man the cyber-barricades for the sake of public education. But older members weren't getting much respect.

### *Implications of the Young and the Restless Scenario*

- IEA members with high expectations and little involvement
- Further alienation from the public and politicians
- IEA has more to do with less
- Difficult for IEA to be proactive
- Fewer people willing to be IEA leaders at state and local level
- Difficult for centralized union to deal with decentralized school decision-making process

### *Leading Indicators of the Young and the Restless Scenario*

*The following future developments could indicate that this scenario is becoming reality:*

- New teachers look to principals rather than to the Association for support.
- New IEA members not going to local leaders
- Businesses forcing change on school
- Business supports certain political candidates who support their education reform agenda
- Payroll protection efforts begin in Illinois

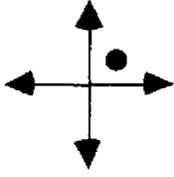
- Diverting public money into private education
- Souring of relationship with Governor Ryan
- Tax caps are tightened
- Property taxes reduced without replacement of state funds

### *Strategic Options of the Young and the Restless Scenario*

*To survive and thrive in this scenario, IEA might:*

- Organize more public support through coalitions
- Become more aggressive in making connection to new teachers (i.e., mentoring programs)
- Engage in more shared decision-making with principals
- Develop coalitions with pro-education businesses
- Business outreach is defined as allies and enemies
- Alternate means to collect member dues—electronic payment
- Organize private schools as members
- Connect through technology
- Be more politically active to protect ourselves
- May need to revisit merger
- Actively organize against any competing organizations
- Increase our resource commitment to student program
- More new leader training
- More emphasis on Covey training and mentoring
- Increase PAC fund
- Show results—higher test scores

## Scenario Four: Nothing Succeeds Like Success



- **Supportive Political Environment**
- **Connected Membership**

*This is a scenario in which the IEA delivers on its promise. With support from political leaders, and the benefit of advances in genetics, brain research, and diagnostics, IEA creates communities of practice that gain the loyalty of their members. After a false start based upon a one-dimensional dependence on standards, the IEA becomes a learning community that helps its members create learning communities that help students enjoy learning in their communities. The resonances induced by this three-layer revolution raise test scores remarkably and help Illinois establish world-class schools.*

You could sense the air of excitement as the 2,200 delegates of the Illinois Education Federation met to conduct their Representative Assembly on March 3, 2013. This year the IEF would be celebrating its 160<sup>th</sup> birthday. Established back in 1853 to promote the formation of public education and teaching in Illinois, the IEF was now an organization representing over 230,000 members. If you were involved in education anywhere—be it in public schools that were flourishing, higher education, private academies, childcare facilities or the new adult learning divisions of American corporations—you were probably a member of the Federation.

As a part of the birthday celebration, Patrick Mogge, the newly elected President of the IEF, planned a tribute for the retired members and staff who were responsible for this phenomenal growth. Pat was a fifteen-year teaching veteran who rose from the ranks of the K-12 division of the Federation. He had been President of the old Student IEA before the turn of the century and had been an activist throughout his teaching career. He was now head of this thriving organization with an annual budget of \$76 million.

Pat was concerned that his newest members didn't really understand or relate to the rapid changes that the organization had adopted to become as strong and successful as it had since the turn of the century. Most of the delegates here today were not really active in the old millennium. Pat knew that understanding the past would help him prepare his leadership for the future, and he was prepared to use this birthday celebration to tell that story.

Since the merger five years ago, the Illinois Education Federation has been in a constant state of change along with every other affiliate of the National Education Confederation. Known as the Illinois Education Association before the merger, the organization became an American success story by the way it had

responded to school change and tied its success to school improvement. Today America is more pleased with its schools than it has ever been, and those positive feelings have been transferred to the IEF. Almost as impressive, IEF members recently gave the organization a 7.6 rating out of ten on an internal opinion poll. These are extraordinary ratings according to Richard Day Research, the polling firm that tracked the IEF for many years. What did leaders in the IEF know and do that made them such a success story when so many other organizations in areas like health care, social services and manufacturing didn't thrive?

According to Mogge, the old IEA made a number of critical decisions in their strategic planning at the turn of the century that positioned them properly to adjust to the changes that would occur. "Our past leaders always kept their eyes on membership development," said Mogge. "They were, therefore, always looking for ways to tie our local affiliates into the institutional changes that were occurring in school districts across the state. The result was a strong emphasis on organizational development."

In the mid-1990s school reformers shifted their strategies and began promoting change by paying more attention to the "output" of public schools rather than to credentials and input. Accountability became the buzzword. Specific standards for every subject area were instituted. Tests were devised to determine whether the standards were met. The State Board of Education pressured every school district to implement the standards and use the results as criteria for personnel decisions. The State Board took control out of the hands of local school boards and curriculum was developed at the state level.

After a short while researchers discovered that the standards strategies weren't working. After spending three years blaming teachers and finding other excuses, they came to the conclusion that the problem was that their strategy was too one-dimensional. Equally as important as the output strategies, school employees had to learn to work more effectively with each other. Standards alone couldn't develop the trust and community between teachers within grade levels. Without high-powered learning communities they couldn't create the dialogue and commitment they needed to use these new learning standards strategies.

At this same time the Chicago school system started to get renewed attention. Paul Vallas, who was Mayor Daley's school CEO, had become a media and business community notable as he attempted for five years to punish the school system into being more effective. In 1999 he announced with great fanfare that he had achieved success and was resigning to take a similar position in Los Angeles. Just like a rubber band, the Chicago school system snapped back to its old behaviors within a year. By the spring session of the legislature in 2001, Republicans and Democrats alike were very frustrated with the Chicago schools. They passed a plan to break up the city into 10 separate school districts and assigned the Illinois State Board of Education to oversee the administration of the districts. Policy makers across the state looked to the governor for a plan for the future to get statewide school improvement back on track.

The Republican Governor, George Ryan, turned to his friends in the old IEA and asked them to help find a solution. Both the Republicans and the Democrats wanted to have a plan in place before the re-election campaign in 2002. After backing Ryan during his campaign in 1998, the IEA spent the first two years of Ryan's term working elbow to elbow with him to improve school funding equity. With bipartisan backing from Clinton and Gore at the national level and Ryan at the state level, they created a plan that reduced elementary class size by adding over 10,000 more teachers across Illinois. "I need a plan and I need it now," said the Governor. Because they were bipartisan, both the Republicans and Democrats trusted the IEA on education issues. They had access to political leaders who listened to their advice.

The IEA created a Task Force from their Center for Educational Innovation to develop multi-school district systems to provide the other needed dimensions to compliment the standards approach. They now had over ten years of experience in networking innovative schools such as their Consortium for Educational Change. These networks had become their research and development laboratories. IEA was also organizing school networks statewide through the Illinois Learning Partnership. They had learned how to develop programs that teachers trusted. They represented and knew how to involve all school employees in school improvement efforts. IEA knew how to work collaboratively with school managers. They had a solid adult learning curriculum. And most importantly, they had verifiable success in improving learning in areas as diverse as the northwest and south suburbs of Chicago. The IEA helped Ryan and worked with both political parties to develop a plan that could be emulated across the state. The legislature and the governor responded with the financial resources. The state's economy was robust at the turn of the century and provided the resources necessary to make change in the massive education system.

The proposal was basically a plan to assist employees at local school building sites to build effective Learning Teams. The IEF staff and school management organization staff collaboratively trained teachers at their work site and with their peers on personal and professional development, and then provided the necessary "outside the system" facilitation as the plans were implemented within the school buildings year after year. The school employees within the building trusted the IEF staff and would take the risks to change because they knew their advocates were on the scene. A localized change curriculum was developed that centered on the organizational issues of change, the personal development necessary to change and the skills necessary to collaborate more effectively with one's peers.

The plans developed more effective Learning Teams that could then embrace the standards strategies and make them work because they had more refined capabilities to work together as collaborative teams. Teachers received credit toward the renewal of their certificates and advancement on the salary schedule for their participation in the learning community curriculum. They became very engaged because the programs were practical, substantive, and enhanced their relationships with their peers. The program helped manage many workplace tensions—including racial and ethnic tensions—which further

contributed to its success. In Chicago, the plan was a natural because it allowed the Chicago Teachers Union to connect with the Local Education Councils that existed in every building, so they excitedly adopted the strategies.

The biggest initial hurdle to developing the Learning Teams was the problem of planning time during the workday, especially at the elementary level. They resolved this problem through some creative legislation that earmarked state funds to expand the school year to provide for paid career development training opportunities for teachers for ten days at the end of each summer before the students arrived. They also restructured the workday, providing significant assistance in enrichment programs where all students were released to other professionals for periods of the day giving some teachers collaboration time.

As the old saw has it, if you want to learn something, try teaching it. And if you want to teach something, you have to learn it. In order to teach its members how to teach their students, the IEF itself became a learning community that helped its members create learning communities in student classrooms. When all three layers of learning locked into mutually reinforcing relationships, the resonances started to sing a song that raised test scores remarkably from 2002 to 2005.

All of the sudden the IEA was besieged with requests from around the state. UniServ Directors were now teaming with management representatives and facilitating the professional development of school employees. The work site changed from the 850 school districts to the 4,500 school buildings in Illinois. In 2002 a significant change occurred when the state organization instituted a new staffing plan. The demands for facilitation and training had become so great that they had to deploy more resources. IEF solved the problem by working with universities and school management. Practicing school employees were released from their districts to participate in specialized doctoral programs on organizational development for schools. The three-year program provided academic training and then practical experience under the direction of a UniServ Director in a set number of school buildings. The UniServ Directors became their mentors and managers. The field staff of the organization jumped from 70 to over 300 in a matter of two years. The organization was pleased because they became the most visible entity helping teachers become more effective and fulfilled. The teachers were pleased and became much more connected to the organization because they saw the direct and personal benefits of being a member.

At the same time that the Learning Team program was growing, exciting developments were occurring in the "New Medicine." The invention of the Genometer in 2004 allowed doctors to quickly analyze the genetic makeup of students at a reasonable price. With the combination of this new genetic knowledge, advances on brain research, and Harvard psychologist Howard Gardner's increasingly sophisticated segmentation of different types of intelligence and learning styles, it became possible to diagnose students and make recommendations that would help maximize the effectiveness of various teaching strategies for each student. Teachers developed Individual Educational Plans (IEPs) for every student. In consultation with technicians and specialists, they

brought all the benefits of modern medicine to the classroom door. Social agencies became networked with schools. This revolutionized teaching in that it helped to overcome some of the social problems that had plagued students and hurt their performance. Excited by the chance to start students off on the right foot with individualized learning plans, the IEF led a successful organizing drive in 2005-6 that brought hundreds of day care centers and private preschools statewide into the fold.

The consequences of these rapid changes put great pressures on the IEF to change and adjust. Collective bargaining contracts evolved to allow much more flexibility at the work site. Negotiations occurred as part of a continuous strategic planning process within a school district. If an employee was disciplined or discharged, the Legal Department of both the IEF and the employer handled the cases far removed from the work of the UniServ Director. Soon the success in the K-12 arena led to an explosion of new organizing opportunities in higher education, private schools and the new corporate adult education training programs. The Federation grew very fast and created semi-autonomous divisions for the general membership categories to provide services and appropriate governance systems.

How the National Education Association and the American Federation of Teachers became merged just five years ago, back in 2008, is another interesting story. At the same time that all of the employment and organizational changes were occurring, there was a great demographic change occurring in the membership of the organizations. The Baby Boomer teachers who were solid “unionists” began to retire in vast numbers. Younger members who they often derisively called the “collaborators” replaced them in leadership positions. The “collaborators” took pay, benefits and protections somewhat for granted and wanted their organization to help them make their work and its results more meaningful to them personally.

During the late 1990s the “unionists” tried to create a strong and controlling national union that preserved leadership positions for the “unionist” leaders. Their rationale was that organizational effectiveness would be enhanced by just uniting and getting larger than everyone else. During the time that trade union results were declining the fastest, they wanted to become the largest and most visible example of the old strategies.

Around the turn of the century, there was a lot of internal turmoil where school change agendas were delayed at the NEA level while two factions fought over the course of the merger. The argument centered around how strong and controlling the national organization would be over the state affiliates and what kind of decision-making process would exist. Finally the “collaborators” prevailed forcing the national leaders to re-conceptualize their entire view of the proper role and structure of the national organization. They developed a set of organizational values that became the centerpiece for a merger agreement. The AFT experienced the same internal changes as the NEA. What emerged was a confederation model in which the national organization’s primary responsibility

was to become a facilitation and communication hub that allowed state affiliates to access national and international resources.

During this same time the national AFL-CIO was disintegrating into a number of independent federations based upon the type of industry. What was a weak federation to begin with broke into five different federations. Organizational affiliation with the AFL-CIO became moot, and the national organization decided to remain independent. Thus the National Education Confederation was born in 2006.

State affiliates were experiencing similar pressures from the variety of educational employees they represented, so they soon adopted a federation model along the lines of the employee groups they represented. Thus, two years later, the merged and semi-united Illinois Education Federation was born, developing basically the same decision-making structure as the national confederation.

As Patrick Mogge finished his speech, he waved to the back of the room toward the section that had been set aside for the retired dignitaries. He gave special recognition to Robert Haisman, who had been president back in the late 1990s and had initiated so many of the changes that they now took for granted. Bob was now 68 and retired from teaching. He savored the applause, waved to the delegates, and beamed a broad grin of satisfaction.

### *Strategic Implications of Nothing Succeeds Like Success Scenario*

- Change of culture and what we are about
  - Public or private?
  - What do we do and how do we do it?
- Will need to grapple with ethical issues related to scientific advances
- How to deal with the “bone-head” principals, administrators
- Can we retool the people we have now to face the challenges of tomorrow?
- Need more buildings for 10,000 new teachers
- Capacity constraints—hiring and re-training to meet demands
- What does IEA have to offer in this discussion?

### *Leading Indicators of Nothing Succeeds Like Success Scenario*

*The following future developments could indicate that this scenario is becoming reality:*

- Building learning teams

- Move from pilot to systemic
- New Senge book

- Funds from the state for learning teams increases
- Echoes of RISE from others in rhetoric
- Become sensitized to new sources for RISE document
- Elements of learning teams negotiated into local contracts
- Emergence of entrepreneurs offering consulting in learning facilitation
- Dilbert strip about gene mapping
- Convicts released from death row because of gene mapping and testing
- Superintendents using collaborative efforts on resumes
- Candidates for IEA office emphasize learning teams
- IEA budget for learning moves up
- Scholarly papers on new theories of learning
- More college courses and research on learning organizations
- Colleges and universities come to IEA for information on how learning teams work
- Growth of learning networks across the state

### *Strategic Options of*

#### *Nothing Succeeds Like Success Scenario*

*To survive and thrive in this scenario, IEA might:*

- Change the description for UniServ field staff to become facilitators instead of grievance filers
- Hire more organizers
- Develop training programs for staff for developing learning teams
- Make development of learning teams a strategic plan
- Make sure Governor has the correct funding plans and suggestions for political appointments

- Change IEA's governance structure to allow private school members and administrators to become members of IEA
- Invite administrators to become part of training programs
- Conduct an organization-wide strategic conversation
- Begin dialogue with people skilled in change management
- Pass legislation dealing with genes
- Insure Board of Education non-obstruction
- Initiate changes in higher ed
- Appoint Science Research Board
- Get certified locals to accept TA's

## Part IV: Strategic Priorities

After considering each of the scenarios in turn, together with their implications, early indicators, and scenario-specific strategic options, the scenario team returned to the present, acknowledged the range of uncertainties represented by all of the scenarios, and sought a “strategy for all seasons”—a short list of strategic thrusts that would be robust across the range of scenarios.

That process fell into two distinct parts. First we looked over the four lists of scenario-specific strategic options in plenary to find items that showed up on several of the lists. These we called “no brainers” in the sense that they should be pursued no matter what scenario transpires.

- Reach out and create coalitions
- Listen harder to membership

These two items are not surprising. In other scenario development efforts in other states, reflection on different scenarios has consistently led to the realization that teachers’ unions and public educators generally run the risk of having built walled fortresses of our schools. Neither parents nor the business community feel that they have sufficient access from the outside in; and teachers often regret the lack of even so much as a telephone to reach from the inside out. So “reaching out and creating coalitions,”— among teachers, parents, businesses, and politicians, appears to be long overdue in many peoples’ eyes.

As for listening harder to the membership, given the focal issue of this entire exercise, namely, “What do our members want and need and what role does IEA have in providing that?” it’s not surprising to see that many members of the scenario team placed a priority on listening harder to the membership.

But how? Our other strategic thrusts are more specific. The following list is ordered to reflect the priorities represented by the votes of the scenario team, and a clustering of closely related items.

## Strategic Thrusts Clustering: Voting Results

The strategic options are grouped under the appropriate strategic thrust cluster heading along with the number of votes each option received in plenary. Cluster-specific comments follow each box:

<b>Cluster 1: “Create Learning Communities”</b>	<b># of votes</b>
Develop learning communities to ensure classroom success and help survive speed of change	21
Develop training programs for staff for developing learning teams	12
Make development of learning teams a strategic plan	10
<b>Total</b>	<b>43</b>

### Comment

The concept of *learning communities* features significantly in *Nothing Succeeds Like Success*, which is clearly the rosiest of the scenarios. But that scenario doesn't just *happen* to IEA. As the header to that scenario has it, “*This is a scenario in which the IEA delivers on its promise.*” How? By becoming a learning community so that it can help its members create learning communities so that they can help their students create learning communities. This strategic priority involves something of a paradigm shift for many teachers: from the primacy of teaching to the primacy of learning; from the importance of the inputs to the importance of the outputs.

<b>Cluster 2: “Use Scenarios to Provoke a Strategic Conversation with the Membership”</b>	<b># of votes</b>
Strategic conversation with our members using scenarios	23
Open up discussion on sacred cows: -Home Schoolers -Private Schools -Tenure -Merger	15
<b>Total</b>	<b>38</b>

### Comment

This cluster speaks to part one of the “no brainers”: *listen harder to the members*. But it says more: engage them in strategic conversation that uses the scenarios to

“think the unthinkable,” as Herman Kahn, the famous futurist, used to say. And surely, if opening up the IEA to home schoolers and private schools borders on heresy, surrendering tenure steps well over the line into the outrageous for many members.

But the scenarios, especially *The Young and the Restless*, raise this heresy out of the realm of the unthinkable and into the realm of what must be thought about quite hard. As several of our interviewees put it early on in the scenario development process: What if IEA ends up having tenure taken away with nothing given in return? Doesn't it make sense to use tenure as a bargaining chip? If tenure has been taken away from workers in virtually every other profession, can it last much longer in education? Why not get something in return for something we're going to have to give up eventually anyway?

These are radical thoughts. But scenarios are designed to provoke radical thinking. And the priority votes of the scenario team and their willingness to use scenarios to think the unthinkable, suggest that now is the time to provoke this strategic conversation with the membership . . . before it is too late.

Cluster 3: "Recruit, Organize, and Train New Members"	# of votes
Special programs for newer members: -mentoring -newsletter for new members -training; how to go through evaluation -interpersonal skills for organizers, local leaders and staff	28
Leadership development and recruiting	3
Hire more organizers	5
<b>Total</b>	<b>36</b>

### Comment

While the general imperative is something of a “no brainer,” the specifics are important: more mentoring, a newsletter, training for personal skills and the ordeal of evaluations. These specifics call for attention. They can be the substance of what keeps new (and old) members more closely connected to the IEA.

Both interviews and discussion among members of the scenario team revealed that many new members feel that they've been cast adrift once they enter their first classroom. Many (not all) lack the guiding hand of a more experienced teacher to help them through their early years.

Are there incentives that IEA could offer older teachers to reach out to younger teachers? Are there programs in mentoring that IEA could create? The existing student program appears to be successful . . . for those who take part. But how many take part?

This cluster is, again, not particularly surprising. It looks pretty obvious. But knowing what to do isn't the same as doing it. This cluster calls less for dazzling insight and creativity than for good old-fashioned (and mid-western) virtues like perseverance, will power, constancy, and energy—just doing it!

<p align="center"><b>Cluster 4: "Modify Organizational Structure"</b></p>	<p align="center"><b># of votes</b></p>
<p>Modify organizational structure to better meet member needs: -partnerships between members, staff and managers at all levels (Saturn) -reform governance structure -consolidate locals to create sufficient resources for programs</p>	<p align="center"><b>32</b></p>
<p align="center"><b>Total</b></p>	<p align="center"><b>32</b></p>

**Comment**

This single strategic option scored higher than any other option on the long list of all of the strategic options, and provoked a fair amount of discussion. Part of the intent is captured by the wording of another strategic option that was eliminated from the voting on grounds of redundancy: "Reach happy medium between 'debating society' and 'streamlined decision and control'."

Like the federal government, with its system of checks and balances, the NEA and its affiliates are perceived by many as having been designed for inefficiency, as if to ensure that that governance is best that governs least. The AFT and its affiliates are more streamlined. Al Shanker was famous for steering the ship. But many of AFT's members are, for that very reason, less connected to a union that is less democratic in its structure and in its culture. The California Teachers Association, the largest of the NEA affiliates, has been described by one of its members as "painfully democratic." Where is the "happy medium" between painful democracy and agile autocracy?

By giving so many votes to this single option, the scenario team clearly believes that organizational structure is an issue deserving further attention—perhaps further strategic conversation among the membership. But nothing in our deliberations pointed a clear path to a resolution of this issue.

<b>Cluster 5: "Reach out to private schools"</b>	<b># of votes</b>
Change IEA's governance structure to allow private school Members and administrators to be members of IEA	<b>27</b>
<b>Total</b>	<b>27</b>

### **Comment**

While the words 'governance structure' appear in this option, it would be wrong to cluster this idea together with the previous option. Here the intent is much more specific than what would be addressed in a general constitutional convention. Here the point is to co-opt the potential threat of those who would eat away at public education's market share by privatization. Rather than regarding private schools as the enemy, reach out and organize them. After all, to the extent that solidarity is a large part of what unionism is all about, then the bigger the better. More members means more clout.

*The following strategic options received some priority votes, but not enough, either singly or in clusters, to make it over the threshold to become strategic thrusts:*

<b>Strategic Options Not Clustered</b>	<b># of votes</b>
Change the description for UniServ field staff To become facilitators instead of grievance filers	15
Integrate technology into business of the association	14
Work with Ryan to redirect ISBE	10
Expand training department to train Administrators (Joint Training)	9
Develop quality education agenda with Ryan administration to change public image	8
Make sure governor has the correct funding plans and suggestions for political appointments	7
Organize private schools as members	7
Learn from history of other states: -Wisconsin -Michigan -Texas -Georgia -Washington -Missouri -Florida	5
Better benchmarks for organizational health (more than just sheer membership)	4
Define conditions under which you would not merge, or would merge	4
Dialogue with people skilled in change management	4
Initiate changes in higher ed and teacher ed	2
Pass legislation on who can use info on genes	2
Take risks and trust instincts	2
Need to grow in order to increase resources	1

## Conversation Highlights from the Strategic Thrusts Exercise

- There seems to be a disconnect between our members and our representatives; need more listening
- Keep the nature of this project in mind
- What it will depend on is how we train people
- Same structure we had in the 70s and we almost went under
- This provides a good opportunity for IEA to develop a strategic conversation
- IFT is actually less connected than IEA; need to be careful about what we change with IEA
- Summer Leadership Academy (SLA) is an example: voted down even though it may have been good enough; didn't have the chance to analyze
- Board members in their regions need to be kept in the loop on more decisions
- We haven't become comfortable with the Board making decisions for the members
- In the Change 2000 committee, there is a strong belief that the organization has to change
- We want the school districts to change but not the IEA itself
- If we want "Nothing Succeeds Like Success" scenario, IEA will have to change

## Further Thoughts

After reviewing the scenarios and developing lists of implications, early indicators and strategic options, the scenario team took a moment to register “second thoughts” on any issues that had escaped our attention and still needed further consideration. Two issues surfaced. One issue, early childhood education, elicited a brief discussion, and shared recognition that there might well be a significant opportunity for IEA to get more involved in early childhood education.

The other issue, special education, stimulated a much longer discussion. Not one member of the scenario team was prepared to argue against special expenditures for special education. But as the conversation progressed, there was a growing recognition that the rapidly growing budgets for special education may amount to a time bomb that will go off at some point in the future. Given that 70-75% of tax-payers in most districts have no children in public schools, what will they think when they discover how much of their taxes are paying for the education of a small percentage of children who are less likely than other children to gain employment and contribute their part to the economy and tax-base of Illinois?

We learned that in one district where the school buses carry 13,000 students, 36% of the transportation budget goes to 4% of the students classified as special ed. In New York, 25% of the education budget goes to 11% of students designated as special ed. California devotes \$3 billion of the 40 billion dollars on public education to special ed. on top of the billions of federal dollars for special ed. In New Mexico, while the budget for regular education increased 8% over a recent fifteen-year period, the budget for special ed. rose 340%.

No one doubts that special allocations should be made for special ed. students. But how much will eventually be regarded as too much? Is there a debate over *eligibility* in our future, a debate presaged by the controversial measures taken to ration health care in Oregon where forward looking policymakers decided to make a list of different procedures and designate those above a certain line as covered by a universal mandate for access for all, and those below the line as “elective” and not covered by public dollars?

As important as the possibility of a public outcry or tax-payer revolt hitting IEA from the outside is the internal debate among teachers who are aware, day in day out, of the opportunity costs of special ed. Where resources are limited, what goes to special education cannot go to mainstream programs. Further, are classroom teachers getting the training they need to cope with the inclusion of special ed. students in their classrooms?

The special ed. time bomb could explode at any time over the next ten years. There are suggestions in several of the scenarios of ways that it might play out, positively or negatively. But the attention already given to this issue by the scenario team on the last day of its deliberations suggests that still more attention be given by the IEA to the factors and forces affecting the future of special education.

## Appendix I: Critical Issues, Key Factors and Environmental Forces

*From the brainstorming of all key factors and environmental forces, the following issues were determined to be critical for all four scenarios and merited further attention:*

- Merger of IEA/NEA with IFT/AFT
- Standards movement for outcome accountability
- Role of UniServ staff
- Role of condition of Chicago schools in setting tone of statewide policy discussion on education
- Vouchers movement to allow parents to use public money for private education
- Economic conditions in US and Illinois
- Split identity of IEA: union vs. professional association
- Technological change
- Quality of education
- Structure of IEA: centralized vs. decentralized? Will the local system change?
- Certification and re-certification of teachers
- Will younger members make a **career** of teaching?
- New (older) members from other professions
- Impact of young members/generational change

*All key factors and environmental forces brainstormed were:*

- who are our members?
- where are they in their professional life?
- are they having difficulties?
- lack of information about rights (younger members)
- concern about job security
- demographics: more female than in the past, 1/5 of members in the 20s, average new teacher is 38 years old
- perception—IEA distant from new members
- Principals are more important meeting needs of new members
- issues of quality will be more important—do we own this?
- law changes—fund of information for new teachers

- decentralization of decision-making—down to the level of the classroom
- large group of support personnel (non teacher issues)
- association perceived as not helpful to new members (even greater with ESPs)
- traditional means to solve problems too narrow
- they need help with instructional problem; interpersonal relationships
- need basic information (IEA as a clearinghouse)
- is the student of 1998 different from students of 1968?
- recruitment—how to organize for new members
- cultural divide within the state (suburbs, downstate)
- Ethnic demographic—differences within the state
- expanded membership outside education (ala AFT)
- public education into social service biz, non traditional realms (e.g.. parenting role)
- new knowledge required—e.g. medical
- traditional services still predominate—dichotomy with new services (what members want might be different from what they need)
- younger members still reflect/want traditional values
- issues driving new members career choices
- change is constant, improvement policies can't keep up
- perception by new ESPs members—2nd class citizens
- teaching no longer a career
- where people teach (private, public, corporate)
- leadership and “rank-and-file” may be at different points
- home schooling
- accountability
- standards setting
- service model deals only “weak caribou”
- where is UniServ time spent?
- where is leadership's time spent?
- leverage of UniServ people within organization
- service delivery definitions are limited/not fully articulated
- tensions between permanent vs. ad hoc systems
- empowerment of members to help themselves
- need presence within buildings—where action is, deliver service there
- association protecting members—IEA as a Viking warrior vs. promoting moral authority of teachers
- top-down approach to strategy
- not connect to where action is—either state or building level
- size of locals—resource allocation
- sense of fulfillment vs. hard work
- diversity in UniServ jobs/nature of work
- responsibility for quality of colleagues
- disaffection of members to 3<sup>rd</sup> association threat
- “boutique” association rising
- parental perception about public education
- public perception about public education
- political climate
- health of the economy

- state regulation
- relationship gap between preparatory institutions (K-12) and reality in the field
- teacher education programs vary in quality
- broker role of IEA (close the gap between state-of-the-art education technology and local needs)
- gap between research on best practices and reality (may be a place for IEA)
- dissemination of research
- effectiveness of NEA—in support and assistance
- focus of NEA
- funding power of NEA
- financial health of IEA
- choice of communication media and use of technology
- resistance to new tech/access and training to use tech
- legislative changes—anti-union legislation
- demoralized teachers—bad rap from outside
- managing and communicating member's expectations
- anti-intellectual movement
- getting money different than education
- role of political action (partisan vs. non-partisan)
- anti-politician but very political in practice/views
- inability to mobilize people
- members in higher combined income range
- business community expectations
- gap between teachers' perception and business and "community" needs
- perception that education is not doing the job (community wants more for the dollar they give)
- suspicion of business
- more teacher for their money perception
- dealing with increased parent involvement
- physical plants
- unclear role of education
- cultural wars within nation/hard to have conversation
- teachers no longer seen as experts
- teachers don't feel qualified
- no high profile advocates (no Michael Jordan of Education)
- differences among teachers experience and training
- 24-hour work because of technology—blurring of lines
- negative perceptions of union
- professional development needs
- dealing with diversity in schools—ethnic & economic
- ethical & moral role of teachers
- future of democracy depend on educated people
- Y2K problem
- knowledge = power: schools as ultimate source of value
- decline/disappearance of public education
- rise of "have-nots"
- dumbing down of jobs
- cognitive science developments (brain and genetic research)

- ability to play/compete within private schools—open up
- training vs. education in private/corporate schools—narrow vs. broad thinking
- technology—geography no long matters; live anywhere; death of suburbs
- certification of Chicago
- teachers know the system has to change
- \$ in education market
- HMO-ing of education
- Globalization of American corporations—European, Asian in the future?
- understand value-added in information leading to knowledge
- realignment of political parties
- shrinking the middle class
- child protection issues
- health care