



2020 – 2021 Local Strategic Plan

Local Affiliate Name: Teachers Association of Anne Arundel County



WHY STATEMENT

MSEA empowers members to make a positive difference in their professional lives in order to elevate the quality of public education for all students.

STRATEGIC PRIORITIES

Building Strong Locals

Building strong locals is an ongoing process, with the goals of ensuring that members are informed, engaged, and empowered. Locals must have, and be able to execute, plans to organize, bargain for, grow, and represent its membership successfully.

Culture of Organizing

A culture of organizing leads to deliberate processes and outreach to continually engage members, develop strong relationships, and effectively reflect and mobilize membership.

Leading the Profession

Educators lead the profession by proactively driving and improving policy and professional practice at the local, state, and federal levels.

SECTION 1:

LOCAL INFORMATION

“Empowered Educators, Successful Students, Connected Communities”

TAAAC supports, organizes, and empowers members to improve their professional lives in order to provide, protect, and promote quality public education for every student.

- **President of Association: [Russell Leone](#)**
- **Officers: [Kate Snyder, Vice President; Tamara Thumbtzen, Secretary/Treasurer](#)**
- **Committee Chairs: [Bylaws: Leona Puglia; Credentials: Robin Murray; Community Involvement: vacancy; Early Career Educators: Hayley Miller; Finance: Tamara Thumbtzen; Government Relations: vacancy; IPD: vacancy; Membership Organizing: Chris Lerch; Minority Affairs: Kaye Witting; Nominating: Nancy Davidson; Sick Leave Advisory: Mike Svec; Special Education: Nicole Disney-Bates](#)**
- **Building Reps: Please attach a roster of Reps.**

SUBMISSION DEADLINE: October 31, 2020 (or before)

*Submit via email to grants@mseanea.org
Attention: Cathy Perry*

Please only submit via EMAIL.

Note: Emailed copies must have electronic signatures included.

Thank you!

SECTION 2:
LOCAL SELF-ASSESSMENT &
STRATEGIC PLAN

MSEA Local Self-Assessment & Strategic Plan Instructions

MSEA believes that strong locals are the heartbeat of the association. The attached tool is provided by MSEA to help you accomplish the following:

- 1. Self-assess your local's strength in ten key areas in order to reflect on what is working in your local and what to do differently moving forward – at the end deciding to either a) ADOPT best practices, b) ADAPT that which is promising but needs modification, or c) ABANDON that which is not working.*
- 2. Using your self-assessment, build a strong plan for the upcoming year in the same ten key areas.*

Who:

- Local Governance and UniServ Directors should complete the assessment and strategic plan together.

What:

- The tool is broken into ten key areas:
 - A) Association Program and Structure
 - B) Leadership Development
 - C) Membership Recruitment/Internal Organizing/Member Engagement
 - D) Public Relations/Communications
 - E) Negotiations
 - F) Government Relations & Political Action
 - G) Professional Issues
 - H) Fiscal Accountability
 - I) Community Engagement
 - J) Representation
- Each key area includes a self-assessment section immediately followed by a strategic plan section.
- For the Self-Assessment sections:
 - Read the key area's description to understand the context of the information.
 - Use the guiding questions to begin a dialog about your local's effectiveness in the given area.
 - Use the rubric provided in the table (ranging from 1-Beginning to 4-Accomplished) to rate your local's performance in each subset area.
- For the Strategic Plan sections:

- Using your analysis from the self-assessment section of each key area, establish goals for the upcoming school year. There are some organizational goals included in the strategic plan for your convenience to reference as you plan.
 - Your self-assessment should also shape your development of activities and programs. As you evaluate your performance in each section, craft your activities and programs to move your local association towards the standards in the accomplished column from the self-assessments.
- Once completed, on the last page, use your rubric ratings to prioritize the ten areas for your local's work in the coming year.

Why:

This tool is designed to encourage reflection, self-assessment, and the setting of targeted areas of growth—a cycle of strategic doing. MSEA will use the rubrics to develop a comprehensive statewide picture of locals' priorities for growth and help us assess whether we have adequate supports and resources in place to help locals reach their goals. We want to be able to help all locals reach their goals effectively. It's important that you are honest and reflective in filling out these pages so that MSEA resources can be directed in the most efficient way possible.

A - Association Program and Structure

Association Program and Structure focuses on the local association’s short-term and long-term viability. In other words, has the local established both short-term and long-term goals and are the goals evaluated based on their effectiveness? The committee structure is key to effective structure and planning.

Guiding Questions for Discussion

1. Does the local have a clear vision and mission? **Yes**
2. Does the local have short- and long-term goals? **Yes**
3. Does the local evaluate the effectiveness of the association program? **Yes**
4. Does the local membership understand the governance structure at the local and state levels? **Yes and No. It is an ongoing education.**
5. Does the local communicate programs and progress to the membership? **Yes**
6. Do committees meet regularly and receive training? **Yes**
7. Are the roles and responsibilities for committee chairs clearly spelled out and understood? **Yes**
8. Does the local abide by its Constitution and Bylaws? **Yes**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • A vision and mission exists, and the Board reviews these annually. • Board annually creates or revisits long-term goals; understands the implications of the organization’s strategy for own actions and tactics. Some goals are pursued, while others are only on paper. The local has a goal for raising PAC funds. • Officers understand the roles of their respective positions, attend monthly RAs, and regularly scheduled meetings. • There is no committee structure outside of the Executive Board. 	<ul style="list-style-type: none"> • Local uses the purpose, culture and history of the organization, as well as educational/union trends, to influence the direction of their work. • Regularly (at least 2x/year) reflects on long-term goals in relation to membership motivations; adjusts to align with member and association resources. • Officers participate in state and national activities, committees, PD, etc. • Board sets short- or long-term goals for the association. • Some specific Board members are solely responsible for things such as political action or membership. 	<ul style="list-style-type: none"> • Board empowers others and promotes a culture that appeals to the different motivations of members while recognizing the contributions of all. • Educates and engages members and others on association strategies and tactics to advance organizational long-term goals and priorities. • Goals are set for the local, based on the local action plan and state initiatives, identifying and recruiting emerging leaders. Board members provide input into the goals for the local. • Local has a few committees established but most are served on by the same small group of members with infrequent meetings. • Each committee has money set aside from the local budget as needed. 	<ul style="list-style-type: none"> • Local implements strategies that move people to act and uses the mission, vision, and core values to drive their work and culture. • Creates value for members through clear and compelling long-term goals and priorities. Members drive the strategies and goals for the association. • Board regularly and effectively engages members for the purposes of communication, feedback, and involvement in local, state, and national activities and initiatives, engaging members to accomplish goals, mentoring new leaders. • Has multiple established and active committees, with new and diverse membership, that meet regularly; committees receive at least annual training on how to conduct their work; each has their own budget; committees give regular monthly report at AR meetings and communicates to all members.

OUR PLACEMENT ON THE RUBRIC: 3.5

A - Association Program and Structure

REFLECTION/RATIONALE/NOTES:

TAAAC has a clear vision, mission, core values, and short and long term goals. These goals are developed by the board annually at their retreat and are reviewed regularly to make modifications (with a new vision to do so bimonthly) and adjustments that move the association forward. The leadership as a whole has an understanding of the local governance structure as well as an understanding of state structures of governance. General membership has varying degrees of understanding of local, state, and national governance structure. TAAAC communicates regularly via email, Facebook, the TAAAC Action Report (newsletter), Action Network and website. The communication is more consistent with members making regular contributions to Facebook and through weekly updates from the president. In the past, apathy was a challenge with communication, but our membership has come to expect and look for the weekly updates. On average, open rate on emails has been 26-30%, and during the COVID pandemic has risen as high as 51%. Committees generally meet monthly or as needed. The chairs have a separate training in the beginning of each school year to acclimate and/or review committee processes, roles, and responsibilities. Each committee chair or designee reports out to the Representative Assembly on a monthly basis. TAAAC engages members in ongoing political action at the local and state level. Meaningful engagement is a challenge, but we have been able to engage more members in the past year. Engagement in committees remains a priority as we restructure or repurpose some of our most important committees in the work to move the association forward.

A - Association Program and Structure

Action Planning Form

GOALS: Engage Building Reps in the Association; Active Committee Structure; Maintain positive communication with members through various modalities; Engage members in Political Action

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Regular Representative Assembly Meetings (RA)	Association Reps	Provide overview of activities, actions, priorities of the association, and encourage consistent engagement	Monthly Sept to June	President, Executive Director, UniServ, BOD	Part of Representative Assembly Budget	<p>Provide up-to-date information, resources and support to reps for them to share back in their buildings.</p> <p>Engage Building Reps through Concerns Committee breakouts</p> <p>Credentials Committee keeps attendance records.</p> <p>RA will balance virtual and in-person with goal of increased participation</p> <p>Follow-up to RA with a recorded summary to all members</p>

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Regular 10 minute meetings at RA <i>(survey indicates high effectiveness of this practice.)</i>	Association Reps	Model 10 minute meeting; Provide clear accurate information in a small group	Monthly Sept to June	TAAAC Board of Directors Members with support from President and UniServ	Part of Representative Assembly Budget for refreshments	This activity will increase reps' knowledge of union activities from their contract to committees to relationship to local, state, and national, and how they can replicate that back in their building. Survey of reps will be conducted to measure the success of regular 10-minute meetings at RA. Survey will be conducted in May/June.
Regularly Scheduled Committee Mtgs.	Membership	Fulfill BOD charges and to move the association forward	Ongoing	President; BOD Liaisons; UniServ; Executive Director; Committee Chairs	Part of Committee Budget Module	Committees execute and evaluate various activities that align with our mission. Hold periodic virtual meets Regular review of the committee charges
Lobby BOE members, County Executive, County Council Members	Appointed and Elected Leaders	Fulfill BOD charges	Ongoing Legislative Session	President; Executive Director; BOD; Member lobbyists; Staff Liaison	Part of Government Relations Budget	In addition to lobbying there is also a Legislative Breakfast. Goal this year to increase member attendance. Members are invited and engage in table talks with Legislators around local and state issues. Explore ways to virtually connect with representatives.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Lobby state legislators	Elected Leaders	Educate politicians on Teaching and Learning Issues.	Ongoing Legislative Session	President; Executive Director; BOD; Member lobbyists; Staff Liaison	Part of Government Relations Budget	Lobby state legislators around state and local issues in teams of members who are well equipped to share their stories. Recruit members in the districts of reps to attend meetings.
Ongoing Recruitment	Membership	Fulfill BOD charges	Ongoing	President; Executive Director; BOD; Membership committee; Staff Liaison	Part of Membership/ Organizing Budget	Member Engagement Form Active recruitment at events and trainings Mid-year review w/ new hires
Regular Communication outlined in Communication Section	Membership	Educate members on Teaching and Learning Issues.	Ongoing	President; Executive Director; BOD; Member lobbyists; Staff Liaison	Part of Communications budget module	Various measurements reviewed to assess communication engagement.

B – Leadership Development

Each local needs to develop its leaders from within. This involves active recruitment at all levels and also involves providing adequate training opportunities so that new leaders can become comfortable in their roles. In addition, leaders are encouraged to attend state and nationally sponsored activities (MSEA Summer Leadership Conference, NEA Representative Assembly, etc.) and the local should provide the financial means for leaders to attend the various functions.

Guiding Questions for Discussion

1. Does the local seek to identify new leaders? **Yes**
2. Does the local recruit, develop and train leaders? **Yes**
3. Is the leadership team in the local diverse and representative of the membership? **Not enough**
4. Do the local's ARs understand what they are supposed to do at the building level? **Yes, but ongoing training is necessary**
5. Does the local have an AR Council that meets at least monthly? **Yes**
6. Does the local utilize one-on-ones, surveys, focus groups, needs assessments, etc. to identify issues? **Some**
7. Does the local send representatives to the MSEA Summer Leadership Conference? **Yes**
8. Does the local make association training available to all members and encourage attendance? **Yes**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Local executive board members double as ARs; no real training; ARs refer members directly to UDs; ARs' primary role is one-way communication with the members at their work site. • Has no discernable leadership program; has no local leadership training program; knows of no members who aspire to leadership positions within or beyond the local. 	<ul style="list-style-type: none"> • Has AR at most sites; one training is provided at the beginning of the year; ARs' primary responsibility is to recruit new members at the start of each year. • Recognizes need to identify new leadership; seeks UniServ assistance for leadership training; informs members of possible leadership positions in MSEA and NEA. • Leaders identify their own leadership strengths and weaknesses and works to improve them. 	<ul style="list-style-type: none"> • Every site has an AR or a contact person; training at least each semester; ARs communicating at least monthly with membership through email and building meetings; ARs participate in targeted membership recruitment; ARs understand and actively fulfill their basic responsibilities. • Actively recruits and trains emerging leaders through the local, state and national leadership development programs. • Builds a diverse group of leaders to take on greater roles and responsibilities in the association. • Leaders are continuously developed and challenged to grow through existing structures. 	<ul style="list-style-type: none"> • Diverse executive board that is proportional to age, gender, race, culture, grade levels, etc. of membership. • Active rep or group of reps at almost every worksite; ARs are in constant communication with members and potential members; ARs are organizers who advocate for the Association; ARs are well trained in employee rights and problem solving. • ARs regularly conduct one-on-ones to surface new leaders, issues and interests within their work site. • Systematically recruits, develops, and trains new leaders; sends multiple members to all possible leadership trainings; assists local leaders to seek positions in state and national groups. • Develops succession strategies that ensure a smooth transition in leadership that sustains the association's vision over time. • Local leadership training is developed and led by members, with UniServ assistance.

OUR PLACEMENT ON THE RUBRIC: 3

B – Leadership Development

REFLECTION/RATIONALE/NOTES: While TAAAC has 64% of buildings covered by identified reps, we continue to work towards the goal of having a building representative at every work site. The UniServ Directors, Executive Director, and President schedule school visits during the entire school year in order to building relationships. Follow up building visits occur throughout the year. We are seeking ways to incorporate virtual building visits. Through these building visits, we can identify potential leaders and encourage participation through one on one conversations. The team looks to recruit diverse members to pursue leadership roles in the association. Building Reps are supported monthly at Representative Assembly meetings by Board of Director liaisons to their particular high school feeder group. Additionally, there is an annual Fall Rep Retreat to provide more in-depth training for building reps on their roles and responsibilities. Surveys and needs assessments are part of an ongoing initiative to identify needs of members. TAAAC recruits up to 10 members to participate in the MSEA Summer Leadership Conference and follows up to engage those members in leadership activities. Additional leadership offerings from MSEA and NEA are advertised for members and they are encouraged to take advantage of these opportunities. Local leadership development is a targeted area that continues to be developed.

B – Leadership Development

In addition to your leadership development goals and plans, be sure to include plans for identifying a building representative in all of your buildings.

Action Planning Form

GOALS: By January 31, 2021 have a building representative identified for at least 90 percent of the worksites
(See attached for Building Rep Chart)

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Board of Directors Recruitment	Building Reps and other members	Identify leaders to move up in organization	Ongoing	President, BOD members, Staff	Minimal	Spend time building relationships, training, and nurturing new leaders into leadership roles. Review once per quarter
MSEA Summer Leadership Conference	TAAAC members Building Reps. BOD	Training for current and future leaders	Summer	President, Staff, BOD, reps	Approx. \$2,500	Feedback from scholarship recipients on value of training. TAAAC offers 10 scholarships for people to attend Measure level of participation in other union activities.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Association Rep. Training	Building Reps.	Help Reps. build influence and power within building	Fall	Staff Committee Liaison, President, BOD, staff	Approx. \$15,000. Grants submitted	<p>Provide information and training for building reps to effectively engage members at building sites.</p> <p>Offer a virtual training session in addition to in-person option</p> <p>Feedback and attendance from members who attend</p> <p>Make follow-up contact with participants</p>
RA Meetings	Building Reps	Develop and inspire current leaders	Second Wed. of each month	President, Executive Director, BOD, staff	Part of Representative Assembly Budget	<p>Provide mini-session on Building Rep responsibility</p> <p>Attendance and feedback during 10 minute meetings with BOD. Returns of sign-in sheets from building reps.</p>
MSEA Trainings	All TAAAC members	Develop and train current/future leaders	Ongoing	President, Staff Committee Liaison, BOD, Governance	Leadership Training Budget Module	<p>Attendance and feedback on evaluations.</p> <p>Use TAAAC-paid training for commitment to a workgroup/committee</p>
TAAAC Board Retreat	Officers, Board of Directors	Develop and Train current and new board members	June	Staff Committee Liaison, President, Executive Director, Staff, MSEA	Aprox. \$8,000 Grants Submitted	<p>Finalize program plan based on prior committee review of program plan.</p> <p>Create and modify long range strategic plans for the following school year.</p>

C – Membership Recruitment/Internal Organizing/Member Engagement

Recruiting and maintaining membership is a key to building an effective local. Identifying new employees and inviting them to join is paramount as well as approaching non-members on an annual basis to encourage them to join. Effective locals have a continuing membership program.

Guiding Questions for Discussion

1. Does the local have a Membership Organizing Committee? **Yes**
2. Does the local train Association Reps on best practices for engaging the members at their schools regularly? **Yes**
3. Does the local regularly engage newly discovered building leaders in association activities? **Yes**
4. Does the local identify new employees, agency fee payers, and potential members for association membership and create a plan to follow-up with them? **Yes**
5. Does the local commit funds to membership recruitment & engagement? **Yes**
6. Does the local have an on-going buddy system to orient new members? **No**
7. Does the local encourage new members to become actively involved in the Association? **Yes**
8. Do local leaders visit targeted schools to talk one-on-one with members, fair share payers, and potential members? **Yes**
9. Does the local have a planned schedule for distribution of local, state, and national materials? **Yes**
10. Does the local provide opportunities for members to meet together and socialize? **Yes**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Receives membership forms/materials and distributes them without personal contact. • Has no membership organizing committee. • Has no particular membership plan. • Holds no regular events for membership. • Has no trained leadership network to move the work of the association at the school level. 	<ul style="list-style-type: none"> • ARs distribute membership forms/materials personally and asks other members to help them. • Leaders, in conjunction with UD, power map the local. • Develops a minimal membership recruitment & engagement plan in cooperation with the UniServ Director. • Designs a leadership network that incorporates governance and AR's in moving communications and accomplishing the work of the local. 	<ul style="list-style-type: none"> • Local uses power map results to identify school & new leader targets. • ARs establish a membership team to make a personal contact with individuals and to solicit membership; feedback is sought and recorded and shared with the local's membership organizing committee. Plan has specific activities for members and new hires during first semester of school; feedback from ARs are examined by the local's membership committee; schools with low membership are targeted. • Utilizes established leadership network to move the work of the association. 	<ul style="list-style-type: none"> • Membership teams personally recruit targeted individuals; after feedback is shared with local membership organizing committee, leaders visit schools and work sites. • Has ongoing, yearlong plan that includes specific activities for members, potential members, and new hires; specific data is used to examine progress. • Regularly educates and trains members of AND assesses and modifies the structure and implementation of leadership network • Studies members and potential member concerns and needs; has several events for new hires, continuing members and potential members; personal contact is done before and after events; feedback examined for future events.

C – Membership Recruitment/Internal Organizing/Member Engagement

OUR PLACEMENT ON THE RUBRIC: 3

REFLECTION/RATIONALE/NOTES:

- TAAAC has a Membership Organizing Committee composed of both active and retired members. This committee is being restructured through an organizing plan that will build its base.
- TAAAC has negotiated language making them an integral part of every New Teacher Processing.
- TAAAC staff makes it a priority to identify new building leaders and engage them in Association activities.
- TAAAC staff identifies and meets with virtually every new employee, signing up approximately 87% of potential unit members for membership.
- New hires who choose to opt out of membership are contacted to encourage them to sign up for membership.
- Throughout the year non-members are encouraged to become members through personal contact, letters, and incentives.
- TAAAC commits over \$30,000 each year for membership recruitment and engagement.
- Start of year activities include New Teacher Processing and New Teacher Orientation. TAAAC has forged a cooperative partnership with Anne Arundel County Public Schools to make NTP and NTO extremely productive for recruitment and encouragement to engage in Association activities.
- TAAAC officers and staff visit schools to talk one-on-one with members and potential members.
- TAAAC distributes of local, state, and national materials at the beginning and throughout the year.

C – Membership Recruitment/Internal Organizing/Member Engagement

In addition to your membership recruitment/organizing/membership engagement goals and plans, be sure to include plans for the recruitment of 90% of all new hires:

Action Planning Form

GOALS: By the end of the membership year (August 31, 2021): Recruit at least 91% of new certificated hires.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
New Teacher Processing	All new unit 1 hires for the year	To sign up new teachers for membership Identify and engage new members	Throughout the year except April and May	TAAAC Staff and leadership	\$2,500	Sign up over 91% of new hires for membership Maintaining/increasing high levels of membership. Track the percentage of new employees who become members of TAAAC.
New Teacher Orientation	All new hires	Member contact; Member sign-up Re-introduce ourselves to new employees over the three day period	August	President, Uniserv Staff, BOD, Membership Committee	\$8,000	Engage potential members in the conversations about the value of membership. See approx. 600 new hires for 2 nd time; Serve lunch one day; Giveaways; Member contact; Track down missing membership forms Hold a virtual welcome/info session as a supplement

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Fall Mailing	Non-members	To encourage joining the union	Sept/Oct	Executive Director	\$500	Evaluate by number/percent of membership applications
Fall/Winter Membership Campaign	Non-members	To encourage joining the union	Nov-Feb	Staff Committee Liaison, Committee	\$2,000	Evaluate by number/percent of membership applications
Association Representative Gift	All ARs	To thank ARs for all their work	May	Staff Committee Liaison, Committee	\$5,000	Success if gift is useful to ARs and promotes our brand
Association Representative Awards Dinner	All ARs	To thank ARs for all their work	May	Staff Committee Liaison, Committee	\$5,000	Dinner plus specific awards for membership percentages, membership increases, RA attendance
Spring Early Enrollment Program	Non-members	To encourage joining the union	Mar-May	Staff Committee Liaison, Committee	\$1,000	Evaluate by number/percent of membership applications
RA Raffle	ALL ARs	To encourage attendance at RA meetings	Sept-June	Staff Committee Liaison, Committee	\$500	Evaluate by RA attendance
Member Appreciation Social	Members	To engage members through networking To encourage future involvement in committees and Union activities	TBD	Special Events Committee, SE Staff Committee Liaison,	\$8,715	Evaluate by attendance, sign-up for committees, PAC sign-ups, other engagement activities. Money raised for TAAAC Foundation.

D – Public Relations/Communications

Developing an effective local does not stop with recruiting new members. Effective communication with the membership must be done on a regular basis. Training opportunities should be utilized by members of the Communications Committee to ensure that information reaches members in a timely and effective manner. In order for this to occur, adequate funds for communication should be budgeted on an annual basis. Finally, communication also does not stop at the school/work site door. As advocates for public education, locals should conduct an ongoing public relations program in order to promote the local and education as a whole.

Guiding Questions for Discussion

1. Does the local have a Communications/PR Committee? **No**
2. Has an internal communications network for the local been established? **YES**
3. Does the local maintain a website and/or social media sites? **YES,**
4. Does the local produce at least a monthly print or digital newsletter? **YES**
5. Does the local effectively promote association activities to members? **YES**
6. Does the local’s budget contain specific funds for communications/public relations activities? **YES**
7. Does the local monitor media coverage? **YES**
8. Does the local speak with area media contacts on education issues? **YES**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • No messages in or out. • Uses 1-2 of the following: webpage, email, newsletters, social media, one-on-one relational meetings. • Mass communication – everyone gets everything. • No relationships with the press or only reactive relationships. 	<ul style="list-style-type: none"> • Messages go out, but not received. • Uses 3-4 of the following: webpage, email, newsletters, social media, one-on-one relational meetings. • Understands how to differentiate communication, but not implementing it. • Has relationships with the press; proactively pitches stories. • President is media trained by MSEA. 	<ul style="list-style-type: none"> • Process exists for two-way strategic communication with membership, including face-to-face conversations. • Develops and implements strategic and integrated engagement plans that utilize a variety of media, technology and social networks. • Tailors communications to appear to different audiences; adjusts the purpose, substances and style. • President and additional members are trained and active as spokespeople for the organization. • A press engagement strategy exists. • Evaluates communication strategy 	<ul style="list-style-type: none"> • Develops and implements plans with consistent, persuasive, and purposeful messages that consider the unique needs of different constituencies. • Evaluates and adjusts communications plans for maximum effectiveness. • Implements a differentiated communication strategy that rallies a diverse set of stakeholders. • Press engagement strategy is long-term and multi-layers, and can influence agendas and actions. • Evaluates communication strategy & adjusts accordingly

OUR PLACEMENT ON THE RUBRIC: 3

D – Public Relations/Communications

REFLECTION/RATIONALE/NOTES: The President and Executive Director have an internal communications network for staff, board of directors, and reps. The President communicates directly with membership through a weekly update via an every member email. The staff, board of directors, and reps also have their own communication networks. They are used for a myriad of budget hearings, elections and local/state/national information distribution. The TAAAC website (www.taaaconline.org) was redesigned to better serve members that will include enhanced features. TAAAC maintains a twitter handle @taaactweets. TAAAC maintains a public Facebook page with over 2,000 likes on the page to communicate information to members as well as the public. TAAAC has created a closed Facebook page where members can post, discuss, and clarify relevant and timely information on a daily basis. TAAAC produces a monthly print newsletter (The TAAAC Action Report) that is distributed to members via building reps. Association happenings, activities, and contract information and updates are shared within the newsletter as well as social media and email outlets as appropriate. Media coverage is monitored through local newspapers and MSEA newsfeed. The President speaks about educational issues with media and local community groups as appropriate. Members are encouraged to tell their real time stories of how particular issues affect them.

D – Public Relations/Communications

In addition to your other goals and plans, be sure to include plans for the following Goal:

By the end of the membership year (August 31, 2021):

- Email addresses: Obtain personal (i.e., non-school) email addresses for at least 75 percent of our members.

Action Planning Form

GOALS: By the end of the membership year (August 31, 2021): TAAAC will obtain personal (i.e., non-school) email addresses for at least 80 percent of our members. TAAAC will effectively utilize multiple forms of communication to inform/engage members and public about education issues.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Facebook/Twitter/YouTube/Instagram (cross-posted)	TAAAC Members; public	Communication	Ongoing	President, PR Committee	\$100-\$300	Increase viewership on website, likes on Facebook, followers on Twitter by 20 percent Closed Facebook page is successful if members are actively posting and engaging in conversation.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Newsletter (TAAAC Action Report)	TAAAC Members	Communicate more effectively with TAAAC Members	Monthly	President, Staff, BOD, Members	\$6,150	Update and monitor electronic/social media communications with membership *Provide email link to PDF every month to members. Explore member sign up for continued print version. Each school to continue to receive 10 copies of a print version.
Home Email gathering	TAAAC members	Direct communication with members	Ongoing	President, Executive Director, staff	Minimal	TAAAC has a very high percentage of home emails and continues to gather them.
Local press communication	Community	Positive communication with community	Ongoing	President, Executive Director	Minimal	TAAAC continues to foster positive communication with local press. Explore a standing column in the Capital Gazette
Video Presidential Message	TAAAC membership/ Community	Consistent message to promote positive aspects of TAAAC	Ongoing	President	Communications module – email/Facebook/social media	Videos to become a widely seen branding for TAAAC. About 5 videos were produced in the previous year and received favorable feedback. Videos were targeted to building reps and members.

E – Negotiations

Members often view the primary role of the association to negotiate the contract. To an extent, this is true, since the outcome of negotiations is a tangible collective bargaining agreement that impacts every member of the bargaining unit. Therefore, effective Locals needs to have a systematic approach to negotiations. Adequate training and preparation cannot be overstated. Preparation for future bargaining should begin as soon as the most recent contract is ratified. District budgets should be analyzed annually. Members should be surveyed for input into the collective bargaining.

Guiding Questions for Discussion

1. Does the local survey members for bargaining interests? **YES**
2. Does the local use MSEA Bargaining Goals to develop proposals? **YES**
3. Does the local establish short- and long-term salary goals? **YES**
4. Does the local provide ongoing training in negotiations and contract maintenance? **YES**
5. Does the local analyze the district budget to develop proposals and make comparisons to other settlements? **YES**
6. Does the local maintain notes for each bargaining session? **YES**
7. Does the local participate in MSEA's Coordinated Bargaining Council? **YES**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Only one-way communication from bargaining team to members occurs. • Leadership obtains copy of goals and shares with bargaining team. • Bargaining and contract maintenance teams (grievance committee) have neither trained in a long time nor utilized theory to drive decisions about salary schedules. • Leadership and bargaining team is educated on salary schedule theory and develops compensation goals. • Leadership creates an internal organizing committee to share written communications around bargaining. 	<ul style="list-style-type: none"> • Local sends out electronic bargaining survey to members and does little or no communication back out to members regarding the results. • Bargaining team engages in discussion with UniServ Director for deeper understanding of goals. • Bargaining and contract maintenance teams do some training, and have a basic understanding of salary schedule theory. • Leadership formally adopts compensation goals. • Leadership develops an internal organizer for each building. • External community organizing committee plans and carries out 	<ul style="list-style-type: none"> • Electronic survey distribution coincides with building meetings to promote participation in the survey and then shares results. • Goals are incorporated into proposals. • Bargaining and contract maintenance teams do joint training and have a good understanding of salary schedule theory. • Membership is educated on salary schedule theory and adopts goals. • Internal organizer shares strategic information with members in their building through ten minute meetings or one on one conversations. • External organizing committee engages parents and organizations in one on one conversations about educational issues and hosts community events to create the 	<ul style="list-style-type: none"> • Local surveys members via electronic survey, building meetings, and one-on-ones then shares out results and how the survey results were used to draft proposals. • Goals are incorporated into proposals and shared with membership. • Bargaining and contract maintenance teams do joint trainings for veteran and new members and communicate regularly; salary schedule theory drives salary schedule decisions. • Membership establishes a compensation policy that guides local decision-making. • Members engage by taking strategic action in support of the bargaining process. • Local is seen as a leader in the community among parents and organizations; the

<ul style="list-style-type: none"> • Local establishes a standing external organizing committee that plans community events. • Local has a very limited understanding of the district budget and financial condition of the district or relies solely on MSEA staff for an understanding. • Local team members' roles are somewhat defined and one member takes notes during sessions. • Local does not follow the Bylaws for contract ratification, the process may be out-of-date or has no defined process in the bylaws. • Local sends a representative to regional CBC meeting. 	<p>community events during bargaining.</p> <ul style="list-style-type: none"> • Local has an understanding of the district budget and financials, however does not use it to develop salary proposals. • Local assigned two team members to take notes; notes are reviewed and become part of the local's records. • Local sometimes follows the Bylaws for contract ratification. • Local representative participates in regional CBC and shares information learned with local bargaining team. 	<p>association's visibility in the community year round.</p> <ul style="list-style-type: none"> • Local analyzes the budget and financials to develop salary proposals. • Local has a plan to archive minutes of bargaining sessions; and notes are used to inform issues during grievance representation or follow up bargaining. • Local has reviewed and updated the Bylaws for contract ratification and follows the process. • Local shares resources and proposals with counterparts in CBC. Works to engage other organized groups in the school district for coordination. 	<p>community seeks its opinion on educational issues.</p> <ul style="list-style-type: none"> • Local team works with UniServ Director to analyze the district budget and financial information to develop salary and other financial proposals to create support with members. • Bargaining team review notes from prior negotiations before developing new proposals in future contract negotiations. • Local has updated Bylaws for contract ratification, notifies members of the process in writing and in person, and organizes for high participation in the ratification vote. • Local communicates regularly with counterparts in CBC to develop and implement strategy, assess progress and coordinate proposals and settlements.
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OUR PLACEMENT ON THE RUBRIC: 4

E – Negotiations

REFLECTION/RATIONALE/NOTES: TAAAC employs survey to determine local priorities. The members have identified their priorities around salary. MSEA bargaining goals are incorporated into proposals as is appropriate. TAAAC has short and long term goals around salary issues. The short term goal is the continuation of regular steps and COLA's. The long term goal is to have all Unit 1 members have their step match their experience credit. The bargaining team meets during negotiation sessions and caucus. The caucus time provides opportunities for professional development on bargaining issues and gives members time to review various parts of the contract that may need updating. The chief negotiator provides opportunities for members of the bargaining team to see the district budget and develop proposals around the budget. We often compare our contract and budget to other Urban Locals and get information from them as needed. During bargaining sessions notes are taken and reviewed at the next regularly scheduled meeting. TAAAC is a participating member of MSEA's Urban Bargaining Council where TAAAC collaborates and shares strategies around bargaining. We also try various suggestions offered by other Urban locals from information gained in those meetings.

E – Negotiations

Action Planning Form

GOALS: Secure competitive salaries, benefits and other working conditions for Unit I employees; Restore additional lost salaries caused by frozen experience steps; Complete FY22 negotiations.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Negotiate FY22 Agreement	TAAAC membership	Improve economic and professional lives of members	September through May	Executive Director Bargaining Team	\$3,000	Success would be a ratified agreement that includes some economic gain for members and improves the AACPS competitive position for recruiting.
Negotiations Committee	TAAAC membership	Increase input from membership on negotiations issues	September through May	Chief Negotiator, President	0	Engagement and guidance for the Negotiations Team to hear from members The Negotiations Committee is comprised of appointed (by President) and elected members
Town Halls and Bargaining Survey	TAAAC Leadership and members	Determine priorities for negotiations based on member input	September	Chief Negotiator	0	Member input is crucial to setting bargaining priorities. Hold Town Hall ahead of survey to help formulate questions

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
						Our goal is to have an equal or greater amount to half of membership respond to the survey.
Communicate Progress	Members	Keep members current on progress of topics under discussion during negotiating sessions	September until a settlement is reached	Executive Director	0	Publish "At the Table" updates to distribute electronically to members. Questions asked "Click counts" on emails Ideas offered
Monitor County and Board of Education budget.		Keep team, leadership, and members current on revenue availability	Ongoing December through June	Executive Director, President	0	Amount and value of information at the bargaining table and before a mediator
Maintain historical data and analyze county revenue and expense projections	TAAAC Negotiating Team, Leadership and members	Security of a third party assessing the quality and veracity of County projections	Ongoing September through March	Executive Director with consultant of their choice	\$3,600	Amount and value of information at the during discussions with County elected officials
Education of membership of the value of Open Negotiations and Multi-year contracts	TAAAC members, community	To build support for future negotiations to be open	Ongoing	Chief Negotiator, President, Board of Directors		Members' education of what open negotiations looks like, what are benefits & challenges, and steps needed to implement

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Use 10-meetings and one-on-ones with members to identify bargaining priorities	Members	Accurately assess priorities	August through October	Staff (school visits) and ARs	0	Used to gather feedback on member concerns.
Use 10-meetings to educate members on salary scale theory. (i.e. margins between steps, steps vs COLA's)	Members	Make members more aware of what and how they are compensated	On going	Staff (school visits) and AR's	0	
Provide professional assistance to members	TAAAC Membership	Provide real value to membership by supplying professional advocates as needed	Ongoing	MSEA UniServs assigned to the local	Virtually all fall to MSEA	Evaluation is anecdotal, indicated by member comments, complaints (or lack thereof).

F – Government Relations & Political Action

The collective voice of MSEA represents, arguably, the most influential voting group in Maryland. Effective locals recognize the potential impact MSEA can have the local, state, and national levels. Advocating for public education is not without cost, however. As a result, locals must develop and maintain an ongoing program to encourage members to participate as both organized people and organized money.

Guiding Questions for Discussion

1. Does the local communicate with members regarding current state and national legislative matters? **Yes**
2. Does the local inform members about their role in the political process? **Yes**
3. Does the local participate in lobbying activities in Annapolis and at home? **Yes**
4. Does the local run an annual PAC drive? **Yes**
5. Does the local communicate recommended candidates to the membership? **Yes**
6. Does the local participate in and provide workers for all recommended races? **Yes**
7. Does the local communicate the links between political action and educational policy-making to members? **Yes**
8. Does the local recruit potential school board members who are advocates for public education? **Yes**
9. Does the local regularly attend school board meetings? **Yes**
10. Is political action part of the local's long-range plan? **Yes**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> Local participates in elections at the local level when the opportunity arises. Fewer than 5% of members contribute to the PAC. Has minimal interest or awareness of the legislative action programs of MSEA/NEA; is opposed to involvement in GR priorities. 	<ul style="list-style-type: none"> Endorses candidates at the local level through a transparent process; participates in MSEA/NEA political campaigns. More than 10% of members contribute to the PAC. Has members who are becoming aware of legislature and political action through information provided by the Association. Local educates membership for awareness of MSEA/NEA legislative program issues and positions. Members understand the PAC. 	<ul style="list-style-type: none"> A member-led GR committee develops candidate interview questions and interviews potential candidates for endorsement. The local works with MSEA/NEA on political campaigns and devises their own, local strategies for implementation. PAC fund exists and an annual PAC drive is held by the Local. At least 15% of the membership actively donates to PAC. Members participate in the Local's legislative lobby program. Leadership attends school board meetings; has a plan to report on major issues to ARs and all members; asks for member feedback. 	<ul style="list-style-type: none"> Identifies and recruits potential candidates for local, state and national races. Member-driven GR committee endorses and supports campaigns through PAC funds and member organizing. Local engages with community to organize around pro-public education candidates. Members participate in election day activities to support candidate campaigns. Over 25% of the membership actively donates to the PAC via payroll deduction. Members participation in the local's legislative and political action programs and are aware of office-holders' positions on educational issues. Local has a functioning lobby team comprised of rank and file members with the ability to generate member involvement, prepares talking points, and encourages membership to present at meetings.

OUR PLACEMENT ON THE RUBRIC: 3.5

F – Government Relations & Political Action

REFLECTION/RATIONALE/NOTES:

- TAAAC communicates with members regarding current state and national legislative matters and informs members regarding their role in the political process.
- TAAAC participates in lobbying activities in Annapolis and at home. Members attend lobbying sessions every Monday night in Annapolis during the legislative session. Specific appointments are made with state legislators during the lobby session. Other appointments are made with the County Council and County Executive.
- TAAAC runs an annual PAC drive. Reps are tasked with sharing PAC information.
- TAAAC utilizes MSEA staff to produce materials and multimedia to educate members on PAC and how important it is for members to donate on payroll deduction.
- TAAAC uses printed and electronic means to communicate recommended candidates to the membership.
- TAAAC works to recruit county executive and county council candidates who are staunch advocates for public education and who are willing to fund the education budget to a level that meets our requirements.
- TAAAC works to recruit house of delegate and senate candidates who are staunch advocates for public education.
- TAAAC works to recruit potential school board members who are advocates for public education and has representation on the Anne Arundel County School Board Appointing Commission.
- TAAAC engages members in the endorsement process to elect education friendly candidates.
- TAAAC participates in and provides workers for recommended races whenever possible.
- TAAAC communicates the links between political action and educational policy-making on a regular basis.
- The TAAAC President and Executive Director regularly attend School board meetings. Members of the TAAAC Board of Directors and the general membership are encouraged to attend specific meetings during the school year.
- TAAAC members attend all school board, county executive, and county council budget hearings.
- TAAAC GO TEAM is engaged in local and state races through phone banking, canvasses and poll work on election day.
- Political action is always part of TAAAC's short and long-range plans.

F – Government Relations & Political Action

In addition to your other goals and plans, be sure to include plans for PAC fundraising between November 30, 2020 and November 30, 2021:

Action Planning Form

GOALS: Between November 30, 2020 and November 30, 2021: TAAAC will build and strengthen relationships with legislators at both county and state levels; TAAAC will increase influence in political decision-making on county and state levels; To elect pro-public education candidates; To increase payroll deduction PAC contributions by 5%.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
GR Committee Meetings	Interested members	Train members to lobby and participate in political activities	Sept – May	GR Committee Chair; President; Staff Liaison	\$3,500	Looking to increase number of contacts with legislators and increase member participation in lobbying and political activities

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Legislative Breakfast	GR Committee ARs Interested Members	Meet and greet state legislators before 2021 session begins	January	Staff Committee Liaison; President; GR Committee	\$2,500	Increase in number of legislators and members participating. Foster relationships between members, political leaders, and school board members
Legislative Lobbying	State Delegates and Senators	Lobby legislators during Educate politicians on Teaching and Learning Issues.	Jan - April	GR Committee; President; Executive Director; Staff Committee liaison	\$2,000	Inform and educate legislators to make a positive impact on legislation Lobby state legislators around state and local issues in teams of members who are well equipped to share their stories. Recruit members in the districts of reps to attend meetings.
Lobby BOE members, County Executive, County Council Members	Elected Leaders	Educate politicians on Teaching and Learning Issues. Provide direct teacher voice on BoE issues to BoE members	Ongoing Legislative Session	President; Executive Director; BOD; Member lobbyists; Staff Liaison	Part of Government Relations Budget	In addition to lobbying there is also a Legislative Breakfast. Goal this year to increase member attendance. Members are invited and engage in table talks with Legislators around local and state issues. Explore ways to virtually connect with representatives.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
PAC Drive	Members	To increase percentage of membership contributing to PAC through payroll deduction	July – Dec	President; Executive Director; Board of Directors; Staff; AR's	GR Budget Module	The ability to help fund campaigns of pro-education candidates is the number one goal.
GO Teams	Members Community members Candidates	To organize members around political action	During Election Cycle 2020	Go Team members, Officers, Executive Director, Board of Directors, Staff, AR's, MSEA HQ Staff	GR Budget Module	GO Team will be an integral sub-group of the GR committee structure. Success will be measured by member turnout and engagement in political action.

G – Professional Issues

Strong locals advocate for quality for all school professions, and promote the association’s role in advancing education transformation, school environments, and student learning. We build capacity for continual improvement and learning and show educational leadership. Strong locals understand their role in student learning and leading our professions, and advocate for policies and strategies that positively impact those roles by analyzing and applying research, policies, and trends to their advocacy work.

Guiding Questions for Discussion

1. Does the local utilize professional cohorts to analyze educational & professional trends? **Yes**
2. Does the local drive collaborative decision-making on key professional issues? **We are at the table.**
3. Does the local research educational & professional trends to determine their advocacy priorities? **Yes**
4. Does the local take an active role in promoting the integrity of the professions? **Yes**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Local governance understands the value of continuous learning and improvement in our professions. • Local governance understands the historic, current, and emerging role that the association plays in our professions. • Local governance understands the policies and strategies that impact our professions and student learning and effectively communicates this with the membership. • Local governance understands that research, policies, and trends impact public education and communicates this to the membership. 	<ul style="list-style-type: none"> • Local governance communicates professional development opportunities to the membership. • Local governance provides PD to membership in order to educate them on importance of the role of the association in student learning and leading our professions. • Local governance and other association leaders forge alliances and agreements that positively impact our professions and student learning. • Local governance provides forums and/or PD on research, policies and trends that impact public education. 	<ul style="list-style-type: none"> • Local governance advocates for meaningful development inside our professions by identifying emerging leaders and energizing members and our diverse set of educational stakeholders. • Local governance and other association leaders identify and promote own members’ credentials and expertise, ensuring association leadership of our professions. • Association leaders and members actively participate in focus groups and other forums to lend insight, voice and action to local and state decision making regarding issues that impact our professions. • Local governance collaborates with our diverse group of stakeholders to conduct, evaluate and communicate education research and practices. 	<ul style="list-style-type: none"> • Local governance and leaders build a culture of professionalism that illustrates the association’s commitment to continuous learning—i.e. professional cohorts assist governance in training members to further their professions. • Local governance along with other association leaders help drive collaborative decision making and policy on our key professional issues. • Local governance and other association leaders help to lead the professions by anticipating challenges and putting in place proactive strategies. • Locals drive effective policy content based on deep understanding of research.

OUR PLACEMENT ON THE RUBRIC: 3

G – Professional Issues

REFLECTION/RATIONALE/NOTES:

Local Governance and members participate in monthly meetings with the Central Office personal (Deputy Superintendent for Academic and Strategic Initiatives; Assistant Superintendent for Advanced Studies; Assistant Superintendent for Curriculum and Instruction; Assistant Superintendent for School Performance) around teaching and learning issues. We discuss issues around curriculum and instruction and make recommendations to the Central Office personal for improvements. Local Governance is regularly part of various state level meetings around Teacher/Principal Evaluation, as well as local meetings around the reauthorization of ESSA. Special Education, High School, Middle School, and Elementary Concerns Committees meeting monthly to provide comments, issues, solutions, and strategies to help other members deal with various issues around Curriculum and Instruction. Instructional Professional Development (IPD) committee plans and oversees trainings around various teaching and learning issues, including special education. Every committee contributes to the program plan and creates their own action plan to include speakers, PD, surveys, etc. The President is fostering partnerships with Board of Education departments around professional and educational issues in which we have a common goal.

G – Professional Issues

Action Planning Form

GOALS: Engage members around professional issues through various forums. Encourage and nurture emerging leaders through professional issues that are meaningful to them.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
TAAAC/ASI Advisory	Central Office Personal	Provide feedback to CO about curriculum & instruction issues	Monthly	President; Deputy Superintendent for Academic and Strategic Initiatives.	Cost Covered by BOE; \$25 per Hour per member	Continual evaluation of activities occurs monthly at the end of each session. There are two sessions per month. One for Secondary and one for Elementary.
High, Middle, Elementary School Concerns	Members at various Levels	Share best practices, concerns, problems, solutions. Provide timely information	Monthly	President; Committee Chairs; Committee Members; BOD Liaisons; Staff Liaisons	Covered in Budget Module for Committees	Concerns Committees meet monthly at the Representative Assembly to bring to light issues that affect them daily around curriculum and instruction.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Special Education and IPD Committees	Members at various Levels	Share best practices, concerns, problems, solutions. Provide timely information	Monthly	President; Committee Chairs; Committee Members; BOD Liaisons; Staff Liaisons	Covered in Budget Module for Committees	Special Ed Task Force plans at least 2 forums a year to address special education issues. IPD will create up to 3 events for members.
Early Career Educator group	Teachers within their first 5 years of the teaching profession	Support for our new educators	Ongoing	President; Executive Director, ECE leaders	\$3,000	Socials and networking opportunities lead by ECE members Mini-trainings embedded at the request of topics by ECE members
Survey members as to needs for PD	Members	Share best practices, concerns, problems, solutions. Provide timely information	As needed	IPD Committee, staff liaison	\$200	Create PD using surveys completed and include speakers on topics of interest to membership. Per a member survey, overnight trainings are not effective or desired.
Book Clubs	Members	Foster networking and discussion around relevant educational issues	Periodic as member interest allows	Board of Directors, staff	Covered in Budget module for Member-ship	Book selections to be determined by suggestions from members, Board of Directors, or Executive Director Sessions to be scheduled according to the groups' determination

H – Fiscal Accountability & Business Management

Effective financial management helps to accomplish the goals of the association. Managing budget development, promoting financial integrity of the association, and utilizing data to analyze trends and inform decision-making are all key components of this work.

Guiding Questions for Discussion

1. Does the local create and adopt a budget each year, in accordance with the process in its Constitution and Bylaws? **YES**
2. Does the local regularly communicate internal budget information to the membership? **YES**
3. Does the local undergo a yearly financial audit? **YES**
4. Are the goals of the local reflected in the budget’s financial priorities? **YES**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Understands business, planning, and budgeting process. • Understands the fiduciary requirements and demonstrates integrity in financial transactions. • Understands the importance of recognizing data and implementing into budget. 	<ul style="list-style-type: none"> • Understands the importance of fiscal responsibility. • Ensures all officers and board members are trained on their fiduciary responsibilities. • Accomplishes the goals of the association by strengthening its fiscal health. • Recognizes implications of union and educational trends on decision-making. 	<ul style="list-style-type: none"> • Ensures business policies reflect financial best practices. • Has financial records and financial practices professionally audited at least every other year. • Increases association resources and infrastructure to accomplish strategic objectives. • Builds support for strategic objectives through membership awareness. 	<ul style="list-style-type: none"> • Uses strategic planning and the development of outcome based goals to create budgets and increase investments. • Uses results from professional audit to inform and modify future bookkeeping and financial practices. Makes a good faith effort to correct any negative findings from the professional audit. • Increases budget sustainability. • Utilizes business trends and data analysis to make decisions that maximize goals, plans, and strategies for growth.

OUR PLACEMENT ON THE RUBRIC: 4

H – Fiscal Accountability & Business Management

REFLECTION/RATIONALE/NOTES: TAAAC budget and finance committee creates a budget yearly based on input from committees, Board of Directors, and needs for the particular year ahead. Monthly budget statements are included in rep materials at Representative Assembly Meetings. Reps are encouraged to share these documents with members in buildings in 10 minute meetings and posting on TAAAC bulletin board in the building. TAAAC has a yearly audit completed by Linton, Schafer, Warfield, and Garrett, P.A. The audit is presented to the Board of Directors for review. Recommendations are adopted as needed by the BOD to continue TAAAC's history of good financial accounting. The goals of the association are incorporated into the budget modules and reviewed by the budget and finance committee.

H – Fiscal Accountability & Business Management

Use this section to set internal operations goals (e.g., set a realistic balanced budget, purchase and begin using QuickBooks to better manage Local finances, upgrade the photocopy machine, etc.)

Action Planning Form

GOALS: Adopt a budget that covers expenses and increases reserves; Maintain reserves to cover 2 years of operating expense

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Annual Budget Adoption	Representative Assembly (the final budget authority)	Planning and prioritizing the use of available revenue	February through May	Financial Manager Executive Director Secretary-Treasurer	\$0	Adopt and implement a budget that meets expenses and leaves a surplus to build reserves Annual audit is one indicator of success. Complete the year in the black.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Maintain reserve fund to update and replace technology	RA	Keep Current Repair or replace worn and torn equipment	February's initial drafting of proposed budget	Financial Manager Executive Director Secretary-Treasurer	Varied annual contribution to reserve fund	Ability to replace equipment as appropriate without impact on operating budget
Annual 3 rd Party Audit	BOD	Assure propriety in management of dues and other revenue sources	December & January	Financial Manger Contracted Auditor	\$11,000	Clean audit report indicating that the resources were spent for the purposes budgeted.
Distribute budget modules to committees	Committee chairs and staff liaisons	Create and justify projected costs for each module	January/February	Financial Manager Secretary-Treasurer	\$0	Action by Finance Committee
Annual Finance Committee Meeting	BOD	Propose budget to the RA	February	Financial Manager Secretary-Treasurer	\$0	BOD Approval
Maintain competent associate staff to support local President, Executive Director, and UniServ staff	TAAAC Leadership and members	Keep services, documents and products at a high quality and cost efficient level	Ongoing	Executive Director TAAAC BOD	\$552,655	Staff is evaluated annually. Anecdotal information is also recognized by local governance, professional staff, and visitors.

I – Community Engagement

A strong local will build meaningful community partnerships in order to engage the community around issues supporting student learning and to act as a collective, compelling advocate for the organization’s goals. Locals engage in community service activities and mobilize to strengthen external relationships.

Guiding Questions for Discussion

1. Does the local seek and maintain strategic relationships with community organizations identified in a community power mapping exercise? **In the beginning stages**
2. Does the local conduct regular community service activities? **YES**
3. Does the local communicate with parent and other groups about educational policy and school climate? **Occasionally**
4. Does the local convene community stakeholders when discussing student learning? **Occasionally**
5. Does the local participate in the creation and implementation of a collaborative organizing & mobilization plan with community groups? **YES**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Has no community engagement for advocacy activities. • Has no partnerships with community organizations. • Has no community engagement around student learning issues. • Has no student, family, or community service activities. 	<ul style="list-style-type: none"> • Connects association messages with various audiences with diverse points of view. • Power maps the community. Uses that information to identify community organizations to engage. Engages different and diverse organizations in the community to identify common issues. • Researches advocacy issues to better understand content and share key messages with community. • Does one event per year that benefits students. No publicity involving the event. 	<ul style="list-style-type: none"> • Builds coalitions by forging relationships with audiences. • Collaborates with different and diverse community organizations, and educates them on key issues. • Creates and implements an advocacy engagement plan that supports student learning and leading the professions. • Schedules and publicizes a few events a year. Success of events are communicated to memberships, administration, and school board. 	<ul style="list-style-type: none"> • Unites disparate audiences around a common message to work cohesively and move a common agenda. • Transforms relationship with the community organizations to harness the power of collective action. • Organizes a collaborative mobilization plan around shared interests of union, educational communities, and legislative bodies. • Has a community service committee that schedules and participates in multiple service events a year; solicits members, non-members, and community leader participation.

OUR PLACEMENT ON THE RUBRIC: 2

I – Community Engagement

REFLECTION/RATIONALE/NOTES: TAAAC participates in community activities that help our students. TAAAC partners with the TAAAC Foundation for Educational Excellence to provide hats, coats, gloves, glasses for students in need, as well as scholarships for graduating seniors. The community involvement committee heads up a backpack program that fills 50 backpacks for needy students in collaboration with the Anne Arundel County Department of Social Services. We also collect donations for Serving People Across Neighborhoods (SPAN) to help community families in need. We meet monthly with the Anne Arundel County Council of PTA's. The Vice-President serves as liaison to that group. Regular contact is made with various outside groups including the Annapolis and Anne Arundel County Chamber of Commerce, COPE (Coalition of Political Education), ACT!, and more. When the need arises community stakeholder groups are convened to discuss topics. We have teachers in our leadership as part of the Annapolis Education Commission and the Committee of community stakeholders within a 4-mile radius of Maryland Live who determine how a portion of gaming proceeds are spent within that 4-mile radius which include extra funds for schools within the boundary.

I – Community Engagement

Action Planning Form

GOALS: Build strategic long-term, sustainable relationships with the local community (PTA’s, PTO’s, and other educational and community groups; Expand upon current community service activities; Build upon existing programs that communicate with parent and community groups about education policy and school climate; Educate and inform the local community on our initiatives; Continue to use social media to assist in achieving our goals.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Student Backpack Program (Through the TAAAC Foundation for Educational Excellence)	Students in need	Engage Members	Summer	Staff Committee Liaison, Community Outreach Committee	\$1600	Engage members, provide charitable service to the community, and build quality relationships with community groups.
Mills King Excellence in Education Human Relations Awards Ceremony	Members	Engage Members	Winter	Staff Committee Liaison, Minority Affairs/Human Relations Committee	\$4,000	Engage members, promote positive human relations within the educational community, and build quality relationships with community groups

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Membership in local Chamber of Commerce affiliates	Members	Engage Local Community	Ongoing	Executive Director, President	\$665	Engage members and build quality relationships with community groups to harness the power of collective action.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Maintain our Community Involvement Committee	Members; community members	Engage Community and put positive light on TAAAC in the community	Ongoing	President, Staff Committee Liaison, Committee Chair, Committee members	\$14,000	Engage members and build quality relationships with community groups through positive public relations and programs designed to support the community.
Engage local community and civic association by attending their meetings	Community groups; Members	Engage parents and community members in favor of partnerships with teachers in AACPS	Ongoing	President, BOD, Staff	0	Engage members and build quality relationships with community groups through positive public relations and programs designed to support the community, and to organize a collaborative mobilization plan around shared interests of union, educational communities, and legislative bodies. Attend community events and attendees report to the RA. Invite local community groups to our RA to talk about their work.
Maintain our Community Outreach Committee	Members; community members	Engage Community and put positive light on TAAAC in the community	Ongoing	President, Staff Committee Liaison, Committee Chair, Committee members	\$14,000	Engage members and build quality relationships with community groups through positive public relations and programs designed to support the community.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Participate on the Anne Arundel County Council of PTA's PTA Founder's Day Event	Parents/ Teachers	Link between teachers and parents	Ongoing	Vice-President	\$50 Founder's Day Tickets	Educate members on various topics PTA is focusing on and build coalitions of parents and teachers around issues. Engage members and build quality relationships with community groups. Regular report to the RA.
Participate in PTA/PTO at every school	Parents/ Community	Link between Teachers and Parents	School Year	Building Reps	Minimal	Engage members and build quality relationships with community groups through positive public relations and programs designed to support the community, and to organize a collaborative mobilization plan around shared interests of union, educational communities, and legislative bodies.
Serving People Across Neighborhoods (SPAN) food/supplies donations	Community members	To support families in our communities in need	Monthly	President; building reps	0	Monthly donations collected at the Representative Assembly are delivered to SPAN to distribute to families in need.

J – Representation

1. Does the local have a Grievance Committee to deal with contract violations? **NO**

1 Beginning	2 Developing	3 Proficient	4 Accomplished
<ul style="list-style-type: none"> • Contract maintenance teams (grievance committee) have neither trained in a long time nor utilized theory to drive decisions about salary schedules. • Local does not have a grievance committee; members are aware of the grievance procedures in the NA; ARs report contract violations to the UniServ directors. • Local has a minimal internal grievance policy. 	<ul style="list-style-type: none"> • Contract maintenance team does some training. • Local has a grievance committee; yet the UniServ directors are consulted prior to any action; local provides training at rep meetings; rep reports concerns at monthly rep meetings. • Local actively works to resolve grievances at every step of the grievance process. ARs are versed in the process and can advise and connect members with the grievance committee. 	<ul style="list-style-type: none"> • Bargaining and contract maintenance teams do joint training. • Local has a functioning grievance committee with a chair who works with UniServ directors to address lower level building concerns; ARs identify member advocates for follow up training. • Local has a grievance policy that includes the decision-making process around representation, binding arbitration, etc., and includes information about the process in association publications. 	<ul style="list-style-type: none"> • Bargaining and contract maintenance teams do joint trainings for veteran and new members and communicate regularly. • Local has a grievance committee and chair and a grievance rep in each site as part of the team of ARs at each site; a grievance rep at each site is responsible for moving grievances at the informal level; local consults with UniServ Director before reducing a grievance to writing. • Members see the value of the grievance process as the method for settling disagreements and knows how the internal process for engaging the grievance committee works.

OUR PLACEMENT ON THE RUBRIC: 2.5

J - Representation

REFLECTION/RATIONALE/NOTES: The closest thing TAAAC has to grievance committee is the Board of Directors who make determinations whether a grievance goes to arbitration. All other lower level activities are handled by UniServ Staff. TAAAC uses the Representative Assembly, Rep Retreats, Board Retreats, and other methods to provide information about representation and what should/could be handled by a rep and what should/can be handled by UniServ Staff. Contract timelines around grievances are short and don't allow for last minute meetings being called to address grievances that pop up. Most issues are first handled for the member by talking to the rep who generally will determine if the issue is for the appropriate supervisor or should go to the UniServ Staff.

J- Representation

Action Planning Form

GOALS: Work to inform BOD, reps, and members about their contract and their roles and responsibilities as outlined in the contract; Maintain a grievance policy that includes the decision making process around representation, binding arbitration, etc., and includes information about the process in TAAAC publications; Promote and provide trainings around negotiations, contract administration and the grievance process; Provide member representation that includes grievance processing.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
What is the planned tactic/event/activity/program?	Who is the target?	Why?	Time of year?	Who are the main people responsible to lead this piece?	Cost involved	What are you looking to accomplish? How are you going to evaluate the success?
Regular 10 minute meetings at RA	Association Reps	Model 10 minute meeting; Provide clear accurate information in a small group about grievance procedures	Monthly Sept to June	TAAAC Board of Directors Members with support from President and UniServ	Part of Rep Council Budget for refreshments	This activity will increase reps' knowledge of union activities from their contract to committees to relationship to local, state, and National.

Activity/Program	Target Audience	Purpose	Timeline	Person(s) Responsible	Budget	Comments/Evaluation/Outcome
Regular 10 minute meetings at building sites	Members	Hold 10 minute meeting; Provide clear accurate information to members	Monthly Sept to June	TAAAC building reps	minimal	Sign in sheet to keep track of attendance.
The TAAAC Board of Directors shall continue to act as the Grievance Committee	Members	Engage Board of Directors in grievance process	Ongoing	TAAAC Executive Director, TAAAC President, BOD, UniServ Directors	None	The TAAAC BOD facilitates the grievance process around arbitration
Promote grievance trainings through MSEA and TAAAC sponsored opportunities	Members	Educate Members on process	Various times throughout the year	TAAAC Executive Director, TAAAC President, UniServ Directors	\$5000	Grievance training opportunities include MSEA Summer Leadership Conference, TAAAC BOD Retreat, TAAAC Building Representative Retreat

Priorities Worksheet

Based on your local reflection, rank the list to the left in order of priority. Your priorities should then be reflected in your local strategic plan for the coming year:

Letter	Category	Rubric Rating
A	Association Program and Structure	3
B	Leadership Development	3
C	Membership Recruitment/Internal Organizing/ Member Engagement	3
D	Public Relations/Communications	3
E	Negotiations	4
F	Government Relations & Political Action	3.5
G	Professional Issues	3
H	Fiscal Accountability & Business Management	4
I	Community Engagement	2
J	Representation	2.5

#1 – I – Community Engagement

#2 – J – Representation

#3 – D – Public Relations/Communications

#4 – C – Membership Recruitment/Internal Organizing/Member Engagement

#5 – G – Professional Issues

#6 – B – Leadership Development

#7 – A – Association Program and Structure

#8 – B – Government Relations & Political Action

#9 – E - Negotiations

#10 – Fiscal Accountability & Business Management



Submitted by: Russell Leone, President

Date: October 31, 2020