

# 2021-2022 AEA COMMITTEE AND TASK FORCE REPORTS

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## Audit Committee

**Members:** Angela Philpot (chair), Patrick Castro, Audrey Cunneely, Carmen Peters, Amanda Shepard, Amber Gould, Marisol Garcia. **Staff Liaison:** Margaret Sleeper

### Charges

1. Carry out the responsibilities assigned to the Audit Committee as defined in the AEA Board of Directors' Policies and Procedures Audit Committee Policy, Section II. B.4 page 43.
  - a. Duties and Responsibilities In the fulfillment of its obligation to monitor, question, inform, improve and advise, and as those responsible for the fairness, thoroughness and accuracy of financial information, the Audit Committee will:
  - b. Report to the Finance and Revenue Committee at least annually;
  - c. Review and understand financial statements;
  - d. Be responsible for the recommendation to the appropriate body of the appointment, compensation and presentation of the work of any public accounting firm performing audit services;
  - e. Review any audit problems or difficulties, and recommend to the appropriate body resolution of disagreements between the independent auditor and management;
  - f. Review the Management Letter provided by the independent auditor;
  - g. Establish procedures for the receipt, retention and treatment of complaints received regarding internal controls and auditing;
  - h. Request to engage independent counsel, independent financial experts or other advisors, as determined necessary to carry out its duties;
  - i. Participate in training necessary to fulfill these duties; and,
  - j. Meets with the auditors at least annually.

### Report

The Audit Committee met with our external auditor, Henry & Horne, after completion of the annual audit. The Committee was given a basic financial overview of the auditing process. The overview included discussions regarding areas of focus for the current year and testing of internal controls. The Committee reviewed the audited financial statement and associated footnotes as well as the Management Letter which details any problems incurred in the audit process or recommendations as how to improve the weakness or deficiency in internal controls. No problems or internal control weaknesses were found.

### Recommendations

The Audit Committee made a recommendation to the AEA Board of Directors for the accounting firm of Henry & Horne to conduct the next audit of our organization.

## Compliance Review Committee

**Committee Members:** Steve Adams (Chair), Lorelei Andersen, Estevan Carreon, Julie Cozad, Jennifer Dwosh, Carlos Robinson (Co-Chair), William Rhodes, Petra Schmid-Riggins **Staff Liaison:** Nicole Adams

### Charges

1. Carry out the responsibilities assigned to the Compliance Review Committee as outlined in Article II, Section 8 of the AEA Bylaws.
2. Monitor and recommend adjustments to AEA Election Districts for the election of AEA state and regional delegates to the NEA Representative Assembly to ensure compliance with NEA's governance documents.

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## Report

The Compliance Review Committee met several times to monitor membership representation figures for both the NEA Representative Assembly election districts and the AEA Board of Directors Governance Regions. Based upon the January 15, 2021 membership figures, the AEA now has 16,728 active members. The average number of members per regional director is 984. The AEA has 13 regions with 17 regional directors. There are 25 members on the AEA Board of Directors, which include 3 state officers, 1 NEA State Director, 1 Retired Director, and 3 Education Support Professional At-large Directors.

The NEA requires that all voting members of the AEA Board of Directors comply with the principle of one person-one vote. The AEA Board of Directors uses a weighted vote which complies with the principle of one person-one vote. Each Regional Director has a vote equal to the percentage of deviation from the average number of members for that region. Directors elected at-large have a weighted vote of 100.

## Recommendations

The Compliance Review Committee recommends no change to AEA governance regions or local association assignments within the AEA Board of Directors governance regions.

## Elections Committee

Committee Members: Shaun Creighton (Co-Chair), Kelly Trujillo (Co-Chair), Anita Bowland, Betsy Brian, Jeanne Erickson, Cathy Gomez, Kinora Hernandez, Joan McCoy, Lizzie Menefee, Marshall Militano, and Judy Moy Staff Liaison: Nicole Adams

### Charges

1. Carry out the responsibilities assigned to the Elections Committee as defined in the AEA Election Policy and AEA Delegate Assembly Standing Rules.
2. Create and submit policy recommendations for AEA elections to ensure consistency, transparency and trust; including but not limited to rules and procedures related to campaigning during AEA virtual events and the potential impacts of the use of social media.

### Report

The Elections Committee met in October, February, and April to carry out the committee charges. In October, the committee edited the NEA-RA nomination form and the AEA Board of Director nomination form to reflect 2022 dates and open positions, as well as set the 2021-2022 association election timeline. Committee members were reminded that they must remain neutral in all governance elections and discussed examples of actions that help maintain neutrality.

At the October meeting, initial discussions were also held related to the Committee's second charge (specifically related to policy recommendations for AEA elections). In January, the Committee worked collaboratively online to flesh out recommendations based on those initial discussions, and in February, the Committee met virtually to finalize and vote on the recommendations, which were sent on to President Thomas for further action.

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The Elections Committee met later in February to certify the NEA-RA Statewide, Regional and Retired nominations and conduct a lottery for candidate placement on the ballot. At a separate February meeting, Co-Chairs Creighton and Trujillo worked with Staff Liaison Adams to produce a video training presentation for local election chairs.

The Elections Committee will meet in April to certify the 2022 NEA-RA elections, certify the elected delegates to the 2022 Delegate Assembly, and begin planning for the election to be held at the 2022 Delegate Assembly.

The Committee has and will continue to carry out its responsibilities as assigned in the AEA Constitution, AEA Bylaws, AEA Board Policy, and the Standing Rules of the Delegate Assembly.

### **Recommendations**

Amend AEA Standing Rules and AEA Board Policy to better clarify campaign guidelines as they relate to virtual assemblies.

Clarify AEA election procedures/guidelines that may impact decisions at the local level (e.g., the March 1 deadline to declare candidacy for an AEA office position may influence locals' candidate recommendation process).

Clarify acceptable methods of submitting AEA nomination forms (e.g., fillable PDF or Word documents, sending required information in an email, paper forms sent via mail, etc.).

### **Educators of Color Leadership Task Force**

**Task Force Members:** Anthony Lovio (co-chair), Christy Sainz (co-chair), Neadra White, Teresa Arvizu, Juliana Horwin, Tina Quinonez, Carlos Morillon Varela. **Staff Liaison:** Liz Leivas

#### **Charges**

1. Review and modify the current 3-year plan to implement the Educators of Color Engagement Plan's priority strategies to meet NEA Bylaw 3.1(g) and achieve true equity in AEA elected leaders and diversity in local leadership.
2. Use existing data to assess the current implementation of outreach to association educators of color, as stated in the Arizona Education Association plan for minority engagement. Present a report to the AEA Board of Directors of successes, gaps in attainment of, and potential actionable items mid-plan as a means to reach goals by 2022.
3. Create a list of strategies and tactics a local association can use to ensure that educators of color are empowered to take on leadership roles within their union.
4. Create strategies to create a database of stories from educators of color of reasons they have chosen to join the profession.

#### **Report**

The Educators of Color Task Force met, reviewed and discussed how current and newly proposed programs promote ethnic minority engagement throughout the Arizona Education Association. Examples of those programs are as follows; Latino Outreach Cadre, Leaders Academy, Summer Institute, National Minority Leadership Conference, Delegate Assembly, Representative Assembly. The task force also recognizes that there

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are funds to assist members of color and can be provided by the state, local or Ethnic Minority Caucus. To better understand why members of colors signed up for their local association the task force used Hustle, a mass texting app to contact all AEA members who identify as a minority. Of the 9,102 identified members of color 6,555 had numbers that were textable and 95 responded with their story.

### Recommendations

Continue to promote all Leadership opportunities through the AEA Insider and AEA Advocate inviting members of color to become part of their Local Leadership structures by becoming a site representative or joining their executive board. Strategies suggested are sending email invitations, publications highlighting members of color, and having 1 on 1 conversations.

Below are the stories we felt are powerful. Please use these stories in the Advocate to highlight members of Color or when a quote is needed to increase the visibility of members of color.

-Unions fight for those who cannot. Provide the support and protection needed from large agencies, negative personnel, rules, and conditions that are dangerous to the workers. Fight for the pays that due, for the levels of work being done. They fight for our right to have time for our families ourselves health and well being . -Dawn Cerven

-Arizona's ranking in Education is at the bottom of the country. It is my hope that in the Union I find a place of support, collaboration, and collective work in order to protect teachers and what we know works for students. -Patricia De la Rosa-Acosta

-I wanted a group that would help protect me in my job, especially in terms of working conditions. My last job did not have a union and I was overworked, far underpaid, and constantly worried I would be fired for being part of the LGBTQ+ community. -Kalista Creighton Ahouse

-Based on a co-workers recommendation, and my fear of unfair practices, I thought I would definitely need help and someone on my side at some point, I have sought the advice of the union representative already and they have helped me with advice. Sometimes you don't know when you will need the advice but when you do, you are 1000% glad you had the option to lean on that knowledge. -Olga Smirnoff

-My father was a big union man even though he did not belong to one and because of that, he encouraged us to always join our unions. He said unions make sure are rights are protected in the workplace and not taken advantage of by power-hungry bosses and supervisors. -Flor Lopez

-Because I want to know my voice is heard when it comes to my students -Savannah Cantu

-I believe there is strength in numbers. I believe all children deserve to have a quality public education. These are the reasons I decided to join AEA because I believe when we work together we can provide all students with the quality education they deserve. - Jessica Hanson

-The simplest answer I can give boils down to two main points: the first is that my family has always been active in the union, and the second is that I strongly believe in AEA's

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core foundation. Throughout my life, my dad (along with other family members) was an active AEA member, so I got a first-hand look at the union from an early age. I even remember attending several NEA conferences as a guest. Over the years, I grew to support and advocate for public education and workers' rights, even taking part in the RedforEd protests a few years back. So for me, it was a no-brainer to join the union as soon as I became eligible, and I hope to continue working with AEA when I finally become a teacher myself. -Jane Carreon

-My father was a union leader as a career firefighter and captain. I read Firefighter Quarterly enough to know there was power in numbers. They have a collective voice at the state and national level influencing legislation that in turn impacts their careers. I knew unions were a good thing for that and so much more. As a new teacher, it was apparent the Glendale Union EA had power and influence. I wanted to be a part of that. -Rudy Aguilar

-Both my wife and our Dad's were Copper Miners and worked many years for Phelps Dodge in the Copper mines of AZ. We saw how the Union took care of our families during difficult times such as the Strike years. Both my wife & I have been in Education for a combined 78 years and understand the importance of belonging to a Union to help us, our families, schools & students to represent us as needed! A strong Union is vital for Public Education! -Francisco Denogean

-Historically education has been inequitable for all students. While educating students, we have come a long way, we still operate in a system that does not provide a level playing field for students and teachers. Without proper funding in education students, staff, and families suffer. All students cannot access educational opportunities in the same way. Students of various races, ethnicities, religion, identities, financial status, and/or abilities do not have access to resources as the general population. Without proper funding and specialized programs, students ultimately suffer, thus increasing educator burnout. Educational burnout means the face of education is changing whether we want it to or not. Burdened, understaffed, and underpaid educators will ultimately leave the jobs they love. I cannot advocate properly for students as a singular voice and expect systemic change. However, as a collective unit, we have a better chance at providing education a fighting chance.-Dahana Zamora

-Estoy en el Sindicato por qué han sido muchos años de abuso solo por el hecho de ser de otra raza. El sindicato nos protege por igual. También porque ellos son más sensibles a los vulnerables, que muchas veces son las personas de otras culturas. Thanks for translating my experience  -Kenya Marquez

-As an educator, it is important for me to be part of an organization of professional teachers in education for credible information and education updates, security, and sense of protection for abuse and unreasonable dismissal. It is also important for me to be a member of an association such this for consultation and reliable advice since I am a foreign teacher teaching in the US. I am thankful to be part of AEA and MEA. Thank you.-Jude Basiga

-I believe being part of the union is the best way to get our voices heard by our legislators, as well as the best way to protect ourselves from being taken advantage of and taken for granted.-Meredith Roach

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-I joined the union because I wanted my voice to be heard, and I wanted to have some leadership opportunities to grow the profession. Having the union get my back on work conditions, and the security of having insurance is very comforting as well. -Jessie McKinley

-I chose to join my union because I felt lost in the district as a teacher. I didn't know where to go for information, who to talk to about any issues, concerns, questions, and ideas that affected myself and other teachers. I was also drawn to learn how our union leaders advocate in a way that makes a difference. It is not easy to advocate or even know when to advocate as a new teacher, or even a seasoned teacher, unless given the opportunity to learn to. This is what my union did for me and continues to do for me. Advocacy, bargaining, and leadership training has built my, knowledge, confidence, utility of resources, and focus enough to contribute to conversations that matter and make change and growth happen for our teachers, rather than just living through the changes that roll our way, with no real input. My union coached and guided me to how to gain a seat at the decision making tables. My union has made my career, less of an, "I just work here," position to an, "let's make things better," position, to where I now feel like I am part of the process district-wide, state-wide, and nationally in my teacher role. - Sara Mendoza

### **Government Relations & Legislative Action Task Force**

**Task Force Members:** Michael McGowan (co-chair), Katie Nash (co-chair), Rachael Eggebeen, Storm Gerlock, Cassandra Lockard, Luci Messing, Nathaniel Ratey, Mario Ruiz, Carrie Wolfe. **Staff Liaison:** Ellie Perez Pawlowski and Brenden Foland

#### **Charges**

1. Review and make recommendations to the AEA Board of Directors regarding the content and prioritization of the AEA Legislative Agenda.
2. Collect member input on legislative priorities and utilize that information in developing the AEA Legislative Agenda.
3. Review recommendations for changes in the AEA Legislative Platform. Present recommended amendments to the AEA Board of Directors and then to the Delegate Assembly for approval.

#### **Report**

The task force developed a legislative survey based off of hot topics facing educators which was sent to all members. Survey results were utilized to shape the Legislative Agenda and make revisions to the agenda. The board approved the changes to the Legislative Agenda. Additionally the task force held two listening tour sessions to gather feedback for the Legislative Platform. The task force also sent out a Google form with questions regarding topics on the Legislative Platform for feedback from members who could not attend the listening sessions. Results were then used to propose amendments to the Legislative Platform. During Research and Policy day, the task force worked on the structure of the listening tour sessions and questions for the listening tour.

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## Recommendations

Due to staff changes, COVID and the emergency of needing to override the AEL, we were unable to effectively implement the recommendations from last regarding the NBI-2019-05. Therefore, this year, the Government Relations and Legislative Action Task Force recommends that AEA host an educational seminar related to the NBI with examples of ALEC, Chamber of Commerce, and other related group bills being proposed at the Capitol. The task force also recommends that AEA put together informational materials about different threat groups with resources that can be accessed by members. As part of these informational materials, the task force also recommends AEA work with other partners to build a coalition against these attack groups, build awareness on good businesses not affiliated with ALEC, and list of businesses and services not supported by ALEC or the Chamber of Commerce that members can reference and support.

## Racial and Social Justice in Education Task Force

**Task Force Members:** Vanessa Jimenez (Co-Chair), Margaret Chaney (Co-Chair), Janice Dwosh, Sarah Mendoza, Linda Somo, Christina Bustos, Sunny Jundt.

**Staff Liaison:** Art Mendoza

### Charges

1. Identify and outline the professional development opportunities to support the work of combating institutional racism in our education system for local and statewide use.
2. Create initial interests & outcomes of the yearly convening to support and engage members around issues confronting BIPOC and LGBTQIA+ Students.
3. Review AEA guiding documents to ensure the appropriate use of language is adopted and racial & social justice in schools is acknowledged.

### Report

**Charge 1: Identify and outline the professional development opportunities to support the work of combating institutional racism in our education system for local and statewide use.**

In order to understand Institutional Racism, we must first agree on the definition: we would suggest the following for PD use:

*The ways in which the structures, systems, policies and procedures of institutions in the US are founded upon and then promote, reproduce and perpetuate advantages for white people and the oppression of Black, indigenous and People of Color (BIPOC).*

*The ways in which institutions legislate and structure reality to advantage white people and oppress BIPOC. The ways in which institutions –Housing, Government, Education, Media, Business, HealthCare, Criminal Justice, Employment, Labor, Politics, Church – perpetuate racism.<sup>1</sup>*

While educators currently must take a course in the history of American Public Schools and many may cite the history of segregation within public education, there is a deficit in discussions regarding the early history of our own government's refusal to bring Black and Brown students into the school system itself. As far back as 1647, Public Schools were created not for the purpose of equality but rather to ensure that white Puritan children would be able to read their Bibles. By 1779, Thomas Jefferson suggested a two-tiered education system to separate the "learned" from the "laborers". It should be noted that in this two-tiered system, it was already assumed that only one group would be able to participate in civic duties. As the nation grew, more territories and states included laws refusing education to Native, African & Mexican, and Asian Pacific Islander Americans while guaranteeing that White children would receive some level of education to further elevate and separate them from the "others". The intention of

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creating an unfair advantage becomes further evident by the 1830's when states begin to create laws forbidding the children of slaves from receiving any education at all. \*<sub>2</sub>

The United States declares its ability to maintain a democracy so long as it is allowed to simultaneously practice capitalism. Early capitalism required a large labor force in order to bring about the enormous profits and the promise of a better life for each generation of owners within the system, owners of the factories or owners of slaves. The need for a larger, cheaper labor force and the competition if created, led to several insurrections and finally a civil war against unbearable, inhumane conditions. One lesson learned after the Civil War was that the more BIPOC people understood about their own oppression, the more they demanded to be treated better, which in turn led to outlawing the very act of learning anything that might help bring about more freedom and demands for equal treatment under the law.

Unionization empowers the worker while creating a docile workforce through public education furthered stereotypes and biases within segregated schools. Perhaps even worse was the elimination of culture and traditions within those cultures in an attempt to "Americanize" and minoritize BIPOC heredity. Spanish speakers were forbidden to speak their own language in school, Native Americans are kidnapped from their homes and forced into obedience through Indian Boarding Schools while official "Killing the Indian to save the man". As all these laws and policies took shape, they further separated any promise for equality. Segregation lawsuits recognized the intentionality of these policies and yet they persisted for years with one of the longest suits in history occurring here in Tucson. Public schools with predominantly black or brown students are routinely negatively portrayed in the media and in the halls of government to reduce or even refuse funding. Less funding has created a deficit in public school preparation for standardized testing – testing that has become less and less relevant to black and brown students and educators over the decades.

A further consequence of institutionalizing racist policies was the clear imbalance in how discipline, curriculums and expectations were handled based on the color of a student's skin. Study after study has shown discipline issues on campuses have led to more Black & Brown suspensions & expulsions. Fear of school shootings, gangs and drugs have led to the perceived need for law enforcement on campus. As fears have grown, teachers have gone so far as to contact law enforcement for elementary student discipline issues. The reason for the reaction is clear when reviewing the data regarding the number of arrests for students of color and their grade level. What does having a police presence on campus do to the daily social- emotional wellbeing of Black students? Safety does not automatically equal success particularly when the "saviors" perceive the students as the aggressors. Law enforcement does not receive the same training to work with students that social workers, counselors or teachers receive. In addition, there is also a change in the perceived role of law enforcement on campuses. The further militarization of police forces have led to more severe reactions to students and enabled the school to prison pipeline to grow and evolve every year. The rules for prisoner expectations and the expectations of student behavior in the nation's "worst" public schools become oddly reminiscent of the need for a docile workforce.

Even more apparent, is the intentionality behind voter suppression laws being passed by the same legislators who deny funding to public schools. There are police officers on campus because there are not enough other alternatives yet there is a real need to explore some of those options.

### **Recommendations**

We should continue to research as a whole; various resources to help others understand the impact of institutionalized racism and its inequities. Professional Development on implementing alternative discipline programs, the impact of including SRO's on predominantly BIPOC school campuses and understanding community building is paramount to reversing the role or implied role of law enforcement and bad decision making by students on campuses. Police should not be seen solely as a threat and part of discipline. If campuses are to become safe havens, every adult on the campus should be seen as a person who will keep a child or young adult safe. Advocating for Teen Courts, mentor programs, trauma workshops & general restorative practice and the funding to implement these programs throughout a district could have tremendous impact on the lives of both students and educators.



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Continued failure to implement alternative programs within an ENTIRE district, places the burden on the classroom teacher rather than the system itself.

Educators should be able to work with students on current racial issues without fear of having teacher's academic freedoms taken away or disciplined by admin/parental threats. Recognizing that parents see the world through their own framework, outside issues may be seen as a threat to their norms. There are two fronts that a Professional Development workshop could attack: the intersectionality between the history of discrimination of BIPOC & LGBTQIA+ populations and the anti-union fervor and violence that has ripped across this country. Professional Development opportunities that review this history along with how to recognize their own deficit mindset of student test scores may allow teachers the ammunition they need to design better standardized tests with a growth mindset.

Articles on academic freedom should be part of every local agreement throughout the state of Arizona. Locals could begin to work with School Boards and the Arizona Libraries Association on the use of Book Boards to analyze or examine complaints from the communities to combat the complete banning of books. AEA could further encourage locals to utilize NEA Honesty in Education training with resources. Finally, a statewide policy could come in the form of an NBI or Resolution at the Delegate Assembly in May, 2022.

<sup>2</sup> <https://www.raceforward.org/research/reports/historical-timeline-public-education-us>

<sup>1</sup> NEA Leadership Summit –Talking Race Breakout session 2021

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

<sup>3</sup> <https://ocrdata.ed.gov/dataanalysis/tools/detailgraphsanddatareport>

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

## **Charge 2: Create initial interests & outcomes of the yearly convening to support and engage members around issues confronting BIPOC and LGBTQIA+ Students**

### **REPORT:**

Not acknowledging a student's identity can lead to depression, and further trauma, - the child no longer is thriving because they are busy fighting the system that denies their acceptance. We have seen the impact of this when BIPOC students identify dolls that look like them as dirty or ugly, stupid or dull. Self expectations and motivations fall to substandard levels and can even create situations where students self harm or put themselves in dangerous situations because they have little self worth.

LGBTQIA+ students who are denied acceptance of who they are or denied the ability to self identify stop participating and start failing. Students should be allowed to change their screen names and pronouns as they identify themselves in web conferencing applications and similar situations. AEA & NEA Conference participants are already encouraged to rename themselves and to bring that autonomy into their classrooms. Doing less is not accepting or acknowledging our students and further denies them the ability to tell others how they see themselves and their purpose in this world. LGBTQIA+ students are facing attacks today at the legislative level where some of our elected leadership are attempting to change society and the acceptance of non-binary students by making it illegal for them to enjoy competing in sports or even to get the healthcare they need. This is a heinous attack on children, parenting and will have dire consequences, further traumatizing people in genuine need of acceptance. It is reminiscent of Jim Crow laws which attempted to prevent any push for activism or equality under the law. It may be possible for change to take place as we are allowed to hire and retain more specialists within the schools in the form of school psychologists, social workers, and counselors. Our communities have been fractured & traumatized, and there is a need to recognize what is good for the whole of the child over our individualized beliefs or frameworks.

### **Recommendation**

There are currently multiple Micro-credential titles on BIPOC/LGBTQIA+ issues. Workshops and Webinars being offered do not speak directly to the inequities within the school system and it has become apparent that NEA has created new tiles to keep up with the demand. Explaining why it is important to recognize internal bias before we explain what it is may aid how others receive or self-

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reflect on this issue. Less defensiveness may result in better implementation as well as less resistance within a district.

As more webinars are created the appropriate level of marketing will also be necessary to ensure member saturation. There is further need to explore resolutions to support proactive school boards to collaborate with locals to explore and support events with a bigger LGBTQIA+ presence or engagement.

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

**Charge 3: Review AEA guiding documents to ensure the appropriate use of language is adopted and racial & social justice in schools is acknowledged.**

### Report

This Committee determined that each committee member would review the AEA Constitution & bylaws and review the language of each to ensure our current language matches our Social Justice non-binary goals. Further, while some locals have a land acknowledgment for their local meetings, many may not or know where or how to create one and should receive guidance or suggestions on creating a land acknowledgment.

### Recommendations

The AEA Constitution and Bylaws appear to lack the pronouns “they, them & their” when referring to officer elections and member duties. Including this pronoun would bring consistency to the overall intent of including of non-binary members and officers and their duties or rights. A resolution will be sent to the Resolutions Committee to bring about this language for the Delegate Assembly meeting in May 2022. It is also recommended that AEA through the Resolutions Committee strongly recommend and encourage locals to implement native land acknowledgment statements at all formal meetings and events.

### FINAL Recommendations for Resolutions Committee:

Three resolutions will be brought before the Resolutions Committee to bring our ideas into fruition:

- a. Be it resolved that locals seek training for members using NEA’s Honesty in Education resources.
- b. Be it resolved that all pronouns regarding the duties of officers within the AEA Constitution and Bylaws be updated from He/she, His/Him/Her/Hers to They, Theirs and Them.
- c. Be it resolved that all AEA strongly recommend and encourages locals to implement native land acknowledgment statements at all formal meetings and events.

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### **Honesty in Education from NEA**

*Provided by J. Dwosh*

*Racial Equity and Soc. Justice Chairperson AEA-Retired*

#### **Resources:**

*Feel free to share the resources with your colleagues and across your networks.*

#### **Honesty In Education**

NEA School Me Podcast E70: Know Your Rights Teach the Truth-Alice O'Brien

<https://www.nea.org/professional-excellence/student-engagement/school-me-podcasts>

NEA Teach the Truth : Know Your Rights

<https://www.nea.org/resource-library/teach-truth-know-your-rights-faq>

NEA EdJustice

<https://neaedjustice.org/>

NEA EdJustice - Honesty In Education

<https://neaedjustice.org/honesty-in-education/>

Race Equity Tool

<https://www.racialequitytools.org/>

Learning for Justice

<https://www.learningforjustice.org>

Teaching People's History: The Howard Zinn Project

<https://www.zinnedproject.org/>

#Resist Syllabus: Cultural Histories of Resistance in the U.S.

<https://ushistoryscene.com/article/resist-syllabus-cultural-histories-of-resistance/>

Social Justice Books for Teaching for Change

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<https://bookshop.org/shop/SocialJusticeBooks>

*What You Should Know About State Measures Restricting Certain Instruction on Racism and Sexism*

[https://neaedjustice.org/wp-content/uploads/2021/08/2021.8.18-KYR\\_post.pdf](https://neaedjustice.org/wp-content/uploads/2021/08/2021.8.18-KYR_post.pdf)

## **Critical Race Theory**

*Critical Race Theory is a Lens*

<https://www.cnn.com/2021/05/27/us/critical-race-theory-lens-history-crt/index.html>

<https://nea.certificationbank.com/NEA/CandidatePortal/CategoryDetail.aspx?Stack=SUMMER>

*What Critical Race Theory Is-and What It Isn't*

<https://www.yesmagazine.org/social-justice/2021/07/07/critical-race-theory-what-is-it>

*What critical race theory is and isn't*

<https://www.cnn.com/2020/10/01/us/critical-race-theory-explainer-trnd/index.html>

*Talking About the Attacks on Critical Race Theory*

<https://www.opportunityagenda.org/explore/resources-publications/talking-about-critical-race-theory>

*What Is Critical Race Theory*

[https://www.youtube.com/watch?v=\\_N7fk1eN4E](https://www.youtube.com/watch?v=_N7fk1eN4E)

**If your local or state Association is interested in providing a presentation on Honesty in Education to its' membership, please have them contact Pam Rios [prios@nea.org](mailto:prios@nea.org) or Aaron Dorsey [adorsey@nea.org](mailto:adorsey@nea.org).**

## **ESP Membership Task Force**

**Task Force Members:** Audrey Cunneely, Jennifer Tracy, AJ Nido (co-chair), Anastasia Jimenez (co-chair). **Staff Liaison:** Rony Assali

**CHARGE1:** Investigate and report on alternative methodologies for determining ESP dues, with recommendations by 2022.

### **Report**

The ESP TF is actively collecting research and data from NEA to review and compare dues collection procedures, structures, and averages across NEA State Affiliates. This work is ongoing and should continue to happen. There are many data sets to include such as budget impact on dues changes, reasons for ESPs leaving, ESP membership trends, and studying various ESP rate tiers and their feasibility on a state-wide basis.

### **Recommendation**

No recommendations will come this year as the budget still will start getting presented to the board in early February.

**CHARGE 2:** Develop conference and training outcomes for a successful AEA ESP Conference and monitor the conference to achieve those outcomes.

### **Report**

Due to several variables including the planning time necessary to implement a conference, the unknown COVID procedures and protocol, and the calendar, the TF deems that a stand-alone AEA conference is not feasible for the Spring of 2022. The committee will meet to discuss training topics and the method to include ESP specific items in Summer Institute.

### **Recommendation**

The recommendation is to implement ESP training (either as a stand-alone track or embedded in a variety of ESP focused sessions) during Summer Institute.

**CHARGE 3:** Create a document or training on best practices for how leaders of wall to wall local associations can better empower ESP members in order to support their priority issues.

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## **Report**

The TF determined that this type of training is important to elevate ESPs within Wall-to-Wall locals.

## **Recommendation**

The recommendation is to include this training (and supporting resources associated with it) in the Summer Institute ESP training options.

## **Finance and Revenue Committee**

**Committee Members:** Patrick Castro, Kelley Fisher, Ken Freed, Marisol Garcia, Amber Gould, Bert Te Velde, Angela Philpot (chair), AJ Nido, Nancy Putman. **Staff Liaison:** Margaret Sleeper

## **Charges**

1. Monitor the AEA budget development process. Review income and expenses and recommend adjustments based on actual revenue and Association needs and priorities.
2. Monitor and provide oversight to the AEA Audit Committee.

## **Report**

The Finance and Revenue Committee met and reviewed the income and expenses of our organization. We discussed the AEA Strategic Plan and ensured our budget was in line with our objectives. We vetted different budgets and discussed the positive and negative aspects of each one before their presentation to the AEA Board of Directors.

## **Recommendations**

The Finance and Revenue Committee will continue to review the Strategic Plan and Verify our budget is in line with the priorities of our organization.

## **Instruction and Professional Development Task Force**

**Task Force Members:** Denise Albright (co-chair), Michelle Cappriotti, Estaban Flemons (co-chair), Melissa Girmscheid, Dorothy Green, Anastasia Jimenez, Jeff Lang, Christopher Kloth, Lisa Millerd, Corina Ontiveros, Michele Theisz. **Staff Liaison:** Nell Pederson

## **Charges**

1. Assess and review AEA/NEA's current professional development offerings and what additional offerings we should be providing to members.
2. As needed, provide feedback, input, and guidance on state-level rulemaking, changes to standards, policy, and high-stakes testing.
3. Compile the latest research of proven teaching and learning strategies that have supported academic success during the COVID-19 pandemic. The final report should in a format that can be shared with members.

## **Report**

The task force members met virtually this fall and winter to review the charges. We provided time during the first meeting for review of microcredentials on the [www.aeapd.works](http://www.aeapd.works) page. This charge was like last year's charge, so our taskforce had a familiarity with the stacks being offered on the webpage. Those offerings could always be expanded, but the taskforce found the content to be satisfactory, as well as robust. The conversation shifted more towards what we can do as a union to encourage use of these professional learning opportunities in ways that strengthen our profession. While

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the members of the taskforce are clearly aware of what is offered, the average member is less likely to know about microcredentials. Some locals, such as Phoenix CTA, have had success in utilizing microcredentials as an alternative pathway for evaluations. We also discussed the possibilities of using microcredentials to receive college credit and for salary advancement. Upon thorough review of charge one, the taskforce found that the real question was how we can, as a union, encourage participation in these member-led learning opportunities, and how can we leverage our offerings to benefit and grow the union. The taskforce believes that member-led professional learning is important. In a time when the demands on educators are ever increasing, this is a way to allow our professionals the autonomy for self-directed learning at their own pace vis-à-vis the top-down model of professional development that many employers still latch on to.

The taskforce reviewed the second charge and determined a need for the union to continue providing training on submitting requests to speak at the legislature, as well as how to track and comment on bills.

To address the last charge, the taskforce researched, discussed, and reviewed learning strategies that have worked during the COVID-19 pandemic. These strategies were compiled into a reference guide for our members and can be found here: <https://tinyurl.com/IPDreferenceguide> .

### **Recommendations**

The IPD Task Force recommends that the AEA Board work with locals to increase awareness of professional learning opportunities through union membership. Locals need more awareness of these opportunities, as well encouragement from the board to bring these opportunities to membership at the local level. The new QTL Learn and Lead Ambassador program is aimed at doing this and should be nurtured by AEA because it is our belief that this can be an effective tool for the union to grow membership and provide professional learning opportunities to more educators and educator support personnel.

Furthermore, we recommend that the board, at the state level, advocate for more teacher-led opportunities. For instance, we as a union can and should advocate for teacher-led professional development. Our members have a better understanding than the employer when it comes to what learning they need. With microcredentials we control our learning, and with this comes greater flexibility to when and where the learning occurs. It should be a union priority for every local to utilize AEA Microcredentials for strengthening the profession.

There are two practical ways we believe locals can immediately adopt professional learning opportunities. These were referred to as tracks in the 2021 IPD Task Force Report. We recommend that the board continues to promote these two tracks. The first is organizing around bargaining so that the union local and employer can agree to count microcredentials towards salary advancement. The second is for either individuals or PLCs to utilize our professional learning opportunities to better pedagogical practice and school community.

Our taskforce recommends the roll out at the local level to consider these components:

- 1) The local leader schedules a meeting with their Organizational Consultant.
- 2) The local leader should include the QTL Learn and Lead Ambassador in planning.
- 3) Identify two or more members to assist the QTL Ambassador in leading guided walkthroughs of our union microcredentials.

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4) The local should have the QTL Ambassador collaborate with the bargaining team to develop proposals and strategies that encourage district-wide adoption of the union's microcredentials, as well as for the purpose of salary advancement.

5) Additional information and resources regarding the union's microcredentials can be found here: <https://cgps.nea.org/micro-credentials/how-it-works/> .

Encourage local officers to complete their annual report in its entirety, which includes identifying a QTL lead from within their local. These QTL leads can also be QTL Learn and Lead Ambassadors. Encourage local officers to have agenda time for QTL report-outs.

### Member Benefits Task Force

**Task Force Members:** Josh Atkins, Suzan Austin, Dana Busenbark, Anna Cicero, Melanie Cobos (chair), Cheryl Heath, Garrett Mehok, Tori Moreland, Karla Palafox. **Staff Liaison:** Sheenae Shannon

#### Charges

1. Review contracts with current vendors and make recommendations to the AEA Board of Directors as needed.
2. Identify and train Member Benefits (MB) Carousel Champions.

#### Report

The task force met on Saturday, October 30, 2021 and discussed the following: The first task force charge is met. At this time, no new recommendations are needed. The second charge requires upcoming AEA events, such as Delegate Assembly and Summer Institute, to be in person. With the knowledge that the 2020 virtual member benefit carousel was not as successful in a virtual environment.

The Task Force:

Agreed to meet at another date in early March once the AEA Board has made a decision regarding the format (In-Person or Virtual) of the 2022 AEA Delegate Assembly and Summer Institute. Currently scheduling a date to reconvene in March.

Will meet with Antonio Galinda with NEAMB and Lisa Almeida with California Casualty to plan out and discuss future member benefit carousel events and training sessions:

- Delegate Assembly,
- Summer Institute, and
- New Teacher Events

Discuss the identification and training of Member Benefits (MB) Carousel Champions.

#### Recommendations

The task force recommends the following:

1. Provide opportunities for Member Benefits to promote the NEA MB program at the 2022 Delegate Assembly.
2. Direct regions A, B, C, & D to identify an ambassador to work with NEA Member Benefits.
3. Provide at least two Member Benefits training sessions for local associations at the 2022 AEA Summer Institute.
4. Schedule an annual training of NEA Member Benefits program to AEA staff

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## Resolutions Committee

**Committee Members:** Frances Banales, Kelly Berg, Gretchen Clifton (co-chair), Jennifer Chastain, Jennifer Pooler, Dan Ireland, Megan McCave (co-chair), Heather Schmitt. **Staff Liasion:** Jarrett Haskovec

### Charges

1. Assist AEA members who are considering amendments to the AEA Constitution, Bylaws, Resolutions, and Delegate Assembly Standing Rules.
2. Assist AEA members drafting new business items at the Delegate Assembly.
3. *Revisit the newly passed AEA Resolutions to determine if statements require additional updating as it relates to conducting business during a crisis, such as a pandemic, and how such crises create shortages, inequities, loss of benefits, and require an emphasis on improved safety and communication.*

### Report

1. Gretchen Clifton, the Resolutions Committee Co-Chair, asked committee members to review the AEA Constitution, Bylaws, Resolutions, Standing Rules and New Business documents to prepare for the AEA Delegate Assembly.
2. Jarrett Haskovec informed members that he will need assistance at the Delegate Assembly fielding amendment and new item requests.
3. The committee then worked on Charge #3.

***The following amendments to the resolutions were proposed. Added language is in caps and highlighted.***

#### Section A

13. Student and Staff **HEALTH AND** Well-Being

The AEA believes that a comprehensive approach to student and education employee safety is paramount to a quality education. This should include physical, social, and emotional safety, **IN ADDITION TO SAFE SITE AND BUILDING FACILITIES.** Appropriate agencies must use their authority to ensure such conditions.

**THE AEA BELIEVES THAT MEASURES SHALL BE TAKEN TO PRESERVE STUDENT AND EDUCATION EMPLOYEE SAFETY, AND THAT ANY SUCH MEASURES SHOULD BE ROOTED IN RESEARCH-BASED STRATEGY AND SCIENCE.**

#### Section B

36. Benefits

The AEA believes that school districts must provide and pay for benefits including, but not limited to, the following:

- a. appropriate sick leave with unlimited accumulation;
- b. comprehensive health, life, long-term disability, dental, and vision insurance including dependent and domestic partner coverage; (08)

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c. leaves (PUBLIC SAFETY, personal, association, sabbatical, parental, leaves of absence) in which case AEA encourages local school districts to provide job security and job assignment; and

d. employee assistance programs. (05)

## Section E

### 7. Federal and State Funding Shares

The AEA, in accord with the National Education Association, believes that the federal share of the cost of public education should be at least one-third. Educational funding should be budgeted separately in recognition of its high priority in the federal budget.

IN ADDITION, THERE SHOULD BE PUBLIC TRANSPARENCY WITH RESPECT TO THE USE OF ALL FEDERAL FUNDS. (02)

*The following NEW resolution was proposed.*

## Section A

### **11. Robust Recruitment and Retention of Quality Educators**

a) The AEA acknowledges that fully staffed schools are required for student physical, emotional, and academic success and safety. In order to keep schools fully staffed, districts should create and maintain robust recruitment and retention programs for qualified professionals in all areas, with special attention to hard-to-fill positions.

b) The AEA acknowledges that in a time of crisis, it is even more difficult to keep schools fully staffed. Therefore, priority should be given to providing and maintaining supports and incentives that keep quality professionals in schools.

c) The AEA advocates for shared financial responsibility of recruitment and retention programs among all appropriate government and district stakeholders in order to ensure fully staffed schools.

### **11. 12. Auxiliary School Employees**

#### **Recommendations**

Gretchen Clifton and Megan McCave, the Resolutions Committee Co-Chairs and committee members will assist AEA members at the Delegate Assembly with the AEA Constitution, Bylaws, Resolutions, Standing Rules and New Business Items.

Gretchen and Megan will present the proposed resolution amendments at the AEA Delegate Assembly.

## **Bargaining and Working Conditions Task Force**

**Task Force Members:** Jay Barbuto, June Blaine, Frank Hunter, April Coleman, Jason Freed, Kerri Glover, Emily Godlove, Daniel McCloy, Antonio Mitchell, Victoria Schroeder (co-chair), Susan Seep (co-chair). **Staff Liaison:** Greg McQuade



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## Charges

1. Execute best strategies to organize local associations' negotiated agreements, memoranda of understanding, and Prop 301 plans and make them digitally accessible to leaders throughout the state.
2. Review the use of coordinated bargaining strategies during regional conversations that contributed to greater local success in bargaining.
3. Propose strategies to support our local associations' ability to impact the use of ESSER and ARPA funds within their district.

## Report

The Bargaining and Working Conditions Task Force met on October 30, 2021; December 11, 2021; and January 6, 2021, to discuss and execute the charges.

## Recommendations

### Charge #1

- Finalized Bargaining Info at a Glance with recommendations to link additional information as an Appendix as well as a request to update graphic design. Document was sent to all bargaining chairs, presidents, and staff in mid-January
- Consider adding language and/or link to policy vault to make it more accessible.
- Discussed breaking bargaining survey into smaller chunks, as well as the request for AEA staff to ask locals for specific good language for policy vault.
- Compile 1-pager for locals to highlight timely bargaining goals, ideas, or inspiration.
  - Consider including level of input (e.g., stakeholder meetings) as a negotiating goal.
  - Include reminder for locals to message the local's role in developing the win.
  - **Goal -- Have 1-pager out to locals in mid-February.**
- Focus on making information out to presidents and bargaining chairs ingestible and manageable in brief periods of time. Consider asks for highlights rather than full documents.
- Provide local presidents/bargaining chairs a list (1-pager), at the beginning of the year (like, in the summer) of ways we want them to engage with the bargaining resources folder per year.
- Send out requests for local bargaining team input at the beginning of the year. Possibly create a few (Jul/Aug, Dec/Jan, May) much shorter surveys during the year.
  - Create somewhat of a Table of Contents for the year with short blurbs for Presidents and bargaining chairs to review and link to longer advisory or language
  - Highlights of bargaining in a report may be enticing rather than a full settlement report. Chunk it
  - Promoting Policy Vault and accessibility

### Charge #2:

- Consider a virtual idea board where local presidents or bargaining chairs can post questions and/or solutions to them. (JamBoard is a Google-compatible app and so might be able to be housed in the same Google Drive.)
- Possible organic groupings of locals -- geography, shared interest, local size, political climate of local school community. There is a possibility locals would be grouped in more

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than one way, depending on particular issues -- and those groupings could change over time. Contact list with how association grouped themselves (somewhat of a ranking); categories based on variety of demographics and bargaining position in district

- Giving time at places like Bargaining Conference, some monthly regional leaders meetings, Summer Institute, etc., to discuss bargaining goals and coordination. We would need a reporting mechanism that goes back to this group to help make connections. Focus on providing time and space to do the things we're asking members and local associations to do.
- Consider re-surveying locals regarding their interest in participating in a coordinating bargaining team.

## Charge #3:

- Accelerated communication pieces on ESSER and ARPA.
  - What's allowed and not allowed?
  - What are other locals/districts doing?
  - We will need to quickly collect information from locals, then quickly report out what local successes have been.
    - Note: ESSER funds will be part of Cash Analysis Reports this year.
    - First survey sent in November focusing on:
      - What did "meaningful conversations" with stakeholders look like in your district? (Check boxes + "Other.")
      - How did your district commit to spending ESSER dollars? (Check boxes + "Other.")
    - How do we help locals where districts already decided on spending without meaningful input from associations? (Is this a way to start to build regional bargaining teams with a common interest and/or with a common background/climate?)
    - Build Timeline for process and input since priorities may change yearly. Association town hall meetings to engage members and community members

## Membership and Organizing Task Force

**Task Force Members:** Sarah Bennett, Keri Blaker, Sandra Cobos, Michele De La Rosa John, Kelly Fisher (co-chair), Amber Gould, Becky Williams (co-chair), Nicole Wolff, Reina York. **Staff Liaison:** Leah Koistinen

## Charges

1. Create a shareable database of supportive organizing tools for locals to organize around safe schools.
2. Create and support an ongoing database of local EA successful organizing strategies and wins that are focused on safe and healthy schools.

## Report

The committee created a Safe Schools Now survey that was shared with local presidents. The survey contained the following questions:

Contact Information

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Was your local association able to negotiate around any of the AEA Safe Schools Now Priorities?

If yes, can you please identify which of the priorities you were able to organize around and/or negotiate for in your district?

Can you please share, in as much detail as possible how you organized, what you negotiated for and what the outcome of this was?

Are there any tools/tips you feel would help other locals when organizing or negotiating around these issues?

The initial survey yielded responses from thirteen locals.

5 (38.5%) locals reported success in negotiating around the AEA Safe Schools Now Priorities. Reporting locals seemed to be able to organize around some, but not all the priorities. A few mentioned that as the pandemic continued, it actually became more difficult to get wins around these priorities.

Organizing strategies mentioned included:

Meeting with district administration either as union leadership or as union representation on district health and safety related committees was a key strategy for several locals.

Locals conducted "Ask Your Union" virtual events and conducted surveys to gather questions/concerns/and data from members to use in conversations with the district.

Negotiating and organizing around Education Support Professional health and safety issues.

It was suggested in the survey that presidents could take time during the Wednesday night leadership calls to discuss organizing tactics around the AEA Safe School Priorities (preferably in breakout rooms).

The committee discussed ways to gather information and tools in an on-going manner.

It was decided that a continuation of the initial survey and conversations during the Wednesday night leadership calls would help with this process.

This would also help keep the priorities in the spotlight.

### **Recommendation**

The AEA President continue to provide time and space for local presidents to discuss additional strategies around the AEA Safe School Priorities during the Wednesday leadership call.

Have local leaders meet in breakout rooms and report out to add strategies to those collected in the survey.

Create a document to share the organizing tools discussed as well as any organizing tool kits already created by the AEA and make it accessible to locals on the AEA website.

An on-going database, starting with the strategies and tools listed above, be included on the AEA website. The list will include a survey link for locals to add to the list as organizing wins occur. The list will be updated as local leaders share wins during the Wednesday night leadership calls and other meetings where union leadership is able to discuss organizing opportunities. As locals continue to organize around additional topics not related to health and safety, this database could evolve to include those tools and wins as well.

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## **Rural Schools Task Force**

**Task Force Members:** Carolyn James, Brita Kimble, David Lipski, Nicole Parker (co-chair), David Rice (co-chair), Jason Teauge, Margie Tsoie. **Staff Liaison:** Leah Koistinen

### **Charges**

1. Current impacts and needs of rural schools and connected communities
2. Examine New Vision for Arizona Schools 2.0
3. Communication tool for rural local associations and statewide leaders

### **Report**

The Rural Schools Task Force met and discussed the current impacts and needs of rural schools and connected communities before examining the New Vision for Arizona Schools 2.0 and discussing a communication tool for rural local associations and statewide leaders.

### **Recommendation**

The task force recommends that AEA assemble a quarterly Rural Schools meeting for leadership of rural locals to collaborate and discuss needs and supports that are unique to rural schools and their connected communities. In addition, the task force recommends that AEA form a Facebook group for leadership of rural local associations to connect, collaborate, and support each other as well as to communicate with statewide leaders. This will provide rural local leaders with the opportunity to communicate and collaborate on the specific issues that rural areas face when time permits and as needs arise.

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