

## District Self-Assessment Tool

For modification of collective bargaining agreements to achieve flexible conditions for school turnaround

The **District Self-Assessment Tool** is designed to support districts, unions and Lead Partners, when analyzing their existing collective bargaining agreement (CBA) with the intention of making **targeted modifications to support the implementation of dramatic reform** in the district’s lowest-performing schools. By outlining objectives and suggested modifications for specific contract elements related to the key condition areas of **People, Program, Time and Money**, the tool can apply to either **district-wide changes** to a CBA or an Article or provision creating a **carve-out zone of flexible conditions for turnaround schools** within a CBA or as an MOU. Should a carve-out zone be established, each school is expected to create an **Election to Work Agreement (EWA)** that determines the working conditions at the school and overrides work rules in the district-wide collective bargaining agreement. See the *Other* category on page 4 for more details on the content of a EWA.

Every district’s contract differs and the contract elements included in this self-assessment should not be considered exhaustive of all CBA provisions that may limit successful implementation of turnaround. A district’s CBA should be carefully analyzed for other provisions that must be modified to support flexibility at the school level in the areas of People, Program, Time and Money for persistently low-achieving schools.

The “Sample Language from Existing CBAs” tool serves as a complement to this District Self-Assessment and offers examples of model language for each contract element to consider when modifying your district’s contract.

Contract Elements	Objective	Modified CBA should include provisions for the following:	Existing Contract Language	Recommended Contract Language
<b>People</b>				
Site-based personnel decisions	<ul style="list-style-type: none"> <li>Allow principals to base staffing decisions on teacher quality and the needs of the school</li> </ul>	<ul style="list-style-type: none"> <li>Default to seniority only when all other measures of quality and fit are equal</li> <li>Assess state tenure law and add meaning to the process at district level</li> </ul>	Click here to insert existing contract language.	Click here to insert recommended contract language.
School assignment	<ul style="list-style-type: none"> <li>Teachers in carve-out zone schools remain union members but consent to conditions of EWA with the option of leaving after two years</li> </ul>	<ul style="list-style-type: none"> <li>All staff must reapply for positions in the first turnaround year</li> <li>Allow staff to voluntarily transfer out</li> <li>All teachers retain status as union members and under state/district retirement</li> </ul>	Enter text.	Enter text.

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		system		
Teacher Evaluation	<ul style="list-style-type: none"> <li>Absent a robust state evaluation system, adhere to a district-wide system which rates teacher performance, institutionalizes plan and support for improvement, and details exit strategy given a lack of improvement</li> </ul>	<ul style="list-style-type: none"> <li>Differentiated rating system of at least 4 categories (e.g. Highly effective, Effective, Basic, Ineffective)</li> <li>Base in part on student growth measure (VAM)</li> <li>Specify steps for improvement and support system</li> <li>Principal, and/or principal designee (i.e., Lead Partner), should have final say over teacher decisions</li> </ul>	Enter text.	Enter text.
<b>Program</b>				
Site-based program decisions	<ul style="list-style-type: none"> <li>Principal discretion over general management such as master schedule and teacher assignment</li> <li>Site-based decision making over curriculum and instruction</li> </ul>	<ul style="list-style-type: none"> <li>Grant flexibility for the principal to determine master schedule and teaching assignments</li> <li>Grant maximum curricular and instructional flexibility</li> </ul>	Enter text.	Enter text.
Professional Development	<ul style="list-style-type: none"> <li>Establish minimum PD time but should be planned and scheduled at school level</li> </ul>	<ul style="list-style-type: none"> <li>Allow for agreed-upon amendments to make timing changes to allow planning time for highest-quality PD</li> <li>Align with school's strategic plan</li> </ul>	Enter text.	Enter text.
Work Rules	<ul style="list-style-type: none"> <li>Create a professional</li> </ul>	<ul style="list-style-type: none"> <li>Allow work rule decisions to</li> </ul>	Enter text.	Enter text.

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	work day of instructional and non-instructional time suited to needs of the school	<ul style="list-style-type: none"> <li>be made at the discretion of school leadership to meet school needs</li> <li>Outline work rules in EWA</li> <li>Work rules must not be subject to grievance procedure</li> </ul>		
<b>Time</b>				
Expanded School Day/Year	<ul style="list-style-type: none"> <li>More time, well used is necessary to dramatically improve student performance in a turnaround environment</li> </ul>	<ul style="list-style-type: none"> <li>Allow length of school day and school year to be determined by school leadership</li> <li>Additional instructional time: minimum 1 hour daily</li> <li>Compensate staff for additional time by stipend vs. per diem rate based on salary schedule</li> <li>Address annual changes to school calendar by a date certain</li> </ul>	Enter text.	Enter text.
Use of Time	<ul style="list-style-type: none"> <li>Turnaround school environment may require modified use of instructional and non-instructional time</li> </ul>	<ul style="list-style-type: none"> <li>Allow school leadership to determine use of time</li> </ul>	Enter text.	Enter text.
<b>Money</b>				
Compensation	<ul style="list-style-type: none"> <li>Allow for differentiated compensation strategy that rewards</li> </ul>	<ul style="list-style-type: none"> <li>Reconsider salary schedule and rewards based solely on years of experience, advanced degrees</li> </ul>	Enter text.	Enter text.

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	performance based on students' academic growth			
School-level budgeting	<ul style="list-style-type: none"> <li>Allow school leadership or school-based team to make budget decisions to meet school's needs</li> </ul>	<ul style="list-style-type: none"> <li>Allocate lump sums to schools</li> <li>Contract should specify school leadership discretion over budgetary decisions in carve-out zone schools</li> </ul>	Enter text.	Enter text.
Incentives	<ul style="list-style-type: none"> <li>Provide incentives to help attract and retain effective teachers, especially in hard to staff areas, and motivate high attendance and student achievement gains</li> </ul>	<ul style="list-style-type: none"> <li>Consider allowing non-certified teachers in STEM</li> <li>Performance bonuses to teachers/schools</li> <li>Incentives for hard-to-staff locations</li> <li>Incentives for high attendance</li> </ul>	Enter text.	Enter text.
<b>Other</b>				
Grievances	<ul style="list-style-type: none"> <li>Minimize time and resources spent resolving grievances</li> </ul>	<ul style="list-style-type: none"> <li>Create internal dispute resolution process with specific timeline, stages and expectations of involved parties</li> <li>Clearly define what is subject to grievance</li> <li>If applicable, end system of binding arbitration</li> </ul>	Enter text.	Enter text.
Third party involvement	<ul style="list-style-type: none"> <li>Allow third party (ex. Lead Partner, charter management</li> </ul>	<ul style="list-style-type: none"> <li>Include language that allows for third party management for carve-out zone schools</li> </ul>		

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Election to Work Agreement	<p>organization) school management</p> <ul style="list-style-type: none"> <li>Allow flexibility in contract to determine working conditions at school level</li> <li>Teachers elect to work based on site contract</li> </ul>	<ul style="list-style-type: none"> <li>Must address the following:               <ul style="list-style-type: none"> <li>-- Create Advisory Board at school level, composed of up to 25% faculty membership</li> <li>-- Length of school day/year</li> <li>--Time required beyond instructional day</li> <li>--Any additional time required during school vacations</li> <li>--Duties or obligations beyond requirements of CBA (incl. Parent meetings, tutoring, office hours)</li> <li>--Any compensation system unique to school</li> <li>--2 year minimum commitment to school</li> </ul> </li> </ul>		
Process for on-going collaboration	<ul style="list-style-type: none"> <li>Enable option to further amend or otherwise modify contract outside of bargaining schedule</li> </ul>	<ul style="list-style-type: none"> <li>Outline expectations of partnership, methods for on-going communication and parameters of "living contract"</li> </ul>	Enter text.	Enter text.