

## **North Bay Workers' Rights Board**

### **Hearing and Investigation on Salary Negotiations and Working Conditions for the Petaluma Federation of Teachers in Petaluma City Schools**

December 11, 2014 • Women's Club Building • Petaluma, California



The North Bay Workers' Rights Board is a community-based project of North Bay Jobs with Justice

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Hearing on contract negotiations and working conditions for teachers in the Petaluma City Schools District

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## **Members of the Hearing Panel**

Jeanette Ben Farhat  
Political Science Instructor, Santa Rosa Junior College

Lisa Maldonado  
Executive Director, North Bay Labor Council

Matt Myres, Chair  
Retired Teacher and Principal, K -12 Education

Rev. Ramón Pons  
Parochial Vicar, St. Vincent de Paul Catholic Church, Petaluma

Rev. Raymond Decker  
Executive Committee, Catholic Scholars for Worker Justice

## **Testimony**

The Workers' Rights Board Panel heard testimony from the following Petaluma City Schools' teachers and union representatives:

Kim Sharp, PFT President  
Sandra Larsen, PFT Lead Negotiator  
Krista O'Connor, Petaluma High School Teacher  
Elizabeth Churilla, Penngrove Elementary Teacher  
Emily Gordon, California Federation of Teachers

The Panel heard testimony from the following parents of Petaluma City Schools:

Jackie Lebihan, Parent  
Jen Newman, Parent

The Panel heard testimony from the following Petaluma City Schools' students:

Corinna Leonardi, Student  
Jeanette Jin, Student

## Report and Recommendations:

### Background

The North Bay Workers' Rights Board (NBWRB) is a community-based board chosen from leaders and professionals of faith, labor and community organizations of the North Bay. The North Bay Workers' Rights Board is affiliated with North Bay Jobs with Justice, a labor-community coalition comprised of 17 unions and community-based organizations. The North Bay Workers' Rights Board is a public forum where workers can bring concerns about violations of workers' rights in the workplace.

In July of 2014, contract negotiations between Petaluma Federation of Teachers (PFT) and the administration of the Petaluma City Schools came to a halt. Teachers have been unable to resolve issues related to their relationship with the superintendent. An impasse was declared and soon contract negotiations will resume with a mediator at the table. Due to this serious impasse between the teachers and the administration of the Petaluma City Schools, the NBWRB agreed to review concerns from the Petaluma Federation of Teachers regarding its difficulty in negotiating a contract with the Petaluma City Schools. This report represents the consensus of the NBWRB based on written testimony, an interview with the superintendent, an interview with a former union president, and a NBWRB hearing held on December 11, 2014, of teachers, parents, students and interested community members. The teachers' concerns initially included:

- Teachers represented by the Petaluma Federation of Teachers have not received a cost-of-living adjustment for the last 7 years, since 2007. Moreover, the teachers also agreed to take a number of furlough days in order to help the District meet its budget shortfall. In the 2014 negotiations, teachers had requested a 4 percent cost-of-living raise and the District offered a 2.5 percent raise.
- Due to a deteriorating relationship with the superintendent, who was acting as the lead negotiator for the District, the teachers requested that the District allow other District teachers, not on the negotiation team, to observe the negotiations. Although the observation of negotiations by other District teachers has been allowed in the past, the District refused to permit other District teachers to observe the negotiations. As a result of the decision not to allow teacher observers, negotiations were halted.
- Teachers expressed multiple concerns about how the District was being managed. Professional development initiatives are not well planned and teachers were not included in the planning of those initiatives. An online grading system had been implemented without careful planning and training was not provided for the teachers.



*Teachers are our greatest assets. They are the people who are influencing our future, molding our future on the most grassroots level. We need to support our teachers. I strongly advise this advisory board to make the strongest recommendation for supporting our teachers, to getting them to have a salary increase, to getting them to actually have a contract. I mean how can they not have job security when they are teaching our future?*

---Jeanette Jin, student,  
Casa Grand High School



## Summary of Issues Raised at the Hearing

### HISTORY AND BACKGROUND OF NEGOTIATIONS

The teachers of the Petaluma City Schools have not received a raise in seven years. In 2007, the teachers agreed to forego salary increases and to take furlough days to enable the school district to meet its budget shortfall. As a result, the salaries of the teachers were cut. Sandra Larsen, teacher and lead negotiator for the Petaluma Federation of Teachers, testified about the impact that these cuts have had on the teachers' salaries compared to those of other districts and compared to the compensation package of the superintendent:

*Our biggest issue is the lack of correct budget information... One session in May, we were given three different budgets. How can you negotiate with someone who cannot or will not give you correct budget information?...I can tell you that this District continually overestimates spending and underestimates income by the tune of 2 million dollars every year....The District does have the money to give us the 4-percent raise that is on the table right now.*

---Sandra Larsen, teacher and  
PFT lead negotiator:

*Looking at maximum salaries, we see that Petaluma dropped to 16<sup>th</sup>. We rank 14<sup>th</sup> in Sonoma County for average teacher salary. There are 11 other districts in the county that have higher contributions to their health benefits. The superintendent is the 3<sup>rd</sup> highest paid superintendent in the county. If you adjust for health and welfare costs, he is number 2. The average teacher salary in the county Petaluma is 14<sup>th</sup> and the superintendent is 2<sup>nd</sup>. Salary does not include the perks that this Board chose to put in the superintendent's contract. He gets \$200 a month car allowance, \$200 gas allowance, \$100 in additional life insurance, \$300 a month in community activities outside his job. That is all on top of his salary. I want to point out that this contract was negotiated while our members were taking cuts and children were losing instructional days. If Mr. Bolman serves for 5 years, both he and his wife will get health insurance until he is 65 paid for by Petaluma City Schools.*

In July of 2014 and as a result of the increasing negativity of the negotiations, the Petaluma Federation of Teachers' negotiations team requested that other District teachers be able to observe the negotiations. This request to allow observers was denied by the District's negotiators. Consequently, negotiations ceased and both sides were unable to find a solution to the standoff. Sandra Larsen explains:

*We have not met since July 7<sup>th</sup>. District negotiators are not allowing our members to quietly observe the process. This is a new demand by the District as observers have always been allowed. Our stance is transparency and this is a good thing. We would love to have everyone observe how taxpayer money is being used. If the District is uncomfortable with that, then we can just keep it with our members. Sadly our superintendent is not comfortable being in a room with his employees.*

Several articles and editorials had appeared in the local newspapers about the standoff between the teachers and the District. Krista O'Connor, a teacher at Petaluma High School, responded to an editorial about the teachers' request to observe the negotiations:



*An Argus Courier editorial a few weeks ago offered two erroneous theories about the observers. One is that we wanted to put pressure on the District's team. The other, that we don't trust our own negotiating team. I was present at the meeting in July, and can say that we were invited there by our team to observe a process we have been allowed to see in the past and to support our team. We were given very clear instructions that we needed to be completely silent when the District's team was in the room, and we were. At the outset, we had asked that the meeting be moved to the larger boardroom, to allow us to simply be present to watch the session that day as a quiet and respectful audience. This request was denied; so several members waited in a much smaller room for about three hours while Mr. Bolman and his team refused to meet and continued to try to find legal precedent to get rid of us. Had Mr. Bolman sensibly agreed to let us remain, many members likely would have watched for a short time, and then been on their way, satisfied that the process was going forward.*

Teacher Krista O'Connor also spoke about the teachers' response to criticisms from local newspapers:

*Recent letters and editorials in our local paper suggest that the hard-working teachers of Petaluma should be "reasonable." This reflects an attitude that has taken hold in many communities across the country. Bashing education and teachers' unions, and labor unions at large, is popular in a system that seeks to keep the status quo in place and does not wish to see laborers share the fruits of corporate profit. Claims that the teachers should be "reasonable" do not take into consideration both sides of a complicated issue. On the surface, the public is being told that we cannot move forward because the Union wants to allow its members to observe negotiation sessions. What is less understood is that in denying this request, the District's negotiating team is seeking to change the conditions of bargaining from what has been allowed in the past. The fundamental issue is not about the observers. What started as an effort to invite teachers on summer break to observe the process, as we have on other occasions, has become a point on which Mr. Bolman cannot move past in order to save some kind of face.*

## NEGOTIATING A FAIR SALARY

Sandra Larsen, lead negotiator for PFT, shared her perspective on the difficulty in negotiating a salary increase. The teachers had difficulty getting clear information on the budget, and there seemed to be misperceptions about the motivations and intentions of the teachers:

*Before we began negotiations this year our team really took the time to study budgets not provided by the District. We had to*



*I would like to see the current board members listen to their teachers when they have decisions to make that directly involve us and our students, to respect us as professionals who know our schools and students and what they need, and to agree to a reasonable and fair contract that recognizes that we have done everything we can to create quality education in our Petaluma schools.*

---Krista O'Connor, teacher,  
Petaluma High School



*Overall, Petaluma City Schools can afford to do better by its teachers. Teachers in this district have taken furlough days and foregone raises during the recession. With an improved state economic picture and a healthy reserve at the local level it is time for the District to negotiate in good faith with its employees. Petaluma can and should provide a fair raise to its teachers, allowing them to support their families and provide the best quality education possible for their students.*

---Carrie Caudle reads statement by Emily Gordon, CFT budget analyst

*look at things that were submitted to the state to get line-item budgets. It was never our intention to ask for more than the District can afford. We believed that Mr. Bolman shared our desire to find us a way to give us a raise that we haven't had in 7 years. It didn't take long to find out that that wasn't true. Statements like "you are new, you don't know them." [and] "They won't remember what they got this year and they will want more next year." That was shocking coming from a man who knew 7 years of cuts in the form of furlough days. Our biggest issue is the lack of correct budget information. I have the J90 for you and I have a sheet that has the last 5 budgets we were given. One session in May we were given three different budgets. How can you negotiate with someone who cannot or will not give you correct budget information? The unaudited actual was reported to the State in September and then last Tuesday and the school board where a completely new budget was presented and suddenly there was \$3,345,484 of new expenses from September not foreseen. It is frustrating how to negotiate a fair contract with someone who won't give us the correct budget information. I asked how we are going to negotiate to get a fair contract. I have been a member of the District's budget committee since 2008. I can tell you that this District continually overestimates spending and underestimates income by the tune of 2 million dollars every year. Last year to be exact it was 1.8 million dollars. There was even \$500,000 that was budgeted for certificated salaries not spent and now it has been rolled over into reserves and we are told that it was one-time spending and we cannot have that money. We found that money early on and we were never given an answer why it was there. The District does have the money to give us the 4-percent raise that is on the table right now.*

There is much evidence that the health of the education budget for the State of California is improving given the gradual economic recovery from the recession in 2007-2008 and the passage of Proposition 30 in 2012. Also, there is evidence that the fiscal health of Petaluma City Schools is improving. Carrie Caudle, a Petaluma teacher, read into the record a statement from Emily Gordon, who is the Budget Analyst for the California Federation of Teachers. Emily Gordon then describes the health of the state budget:

*I work across the state assisting our local affiliates with district budget analysis and contract negotiations. I also work to help our locals understand what's happening with the state and federal budget in terms of education funding and policy. In terms of the big picture, our state economy is in a recovery mode and significant investments are being made in K-12 education. While we are still far from where we need to be, the*

*passage of Proposition 30 in 2012 and overall growth in the economy have allowed for a reinvestment in education and a movement away from the draconian cuts we saw during the recession...As evidence of the improving state economic picture, a recent report released by the Legislative Analyst's Office - often referred to as the LAO - is estimating that the state will end the 2015-16 budget year with \$4.2 billion in total reserves. Higher state revenues will also drive the Prop 98 minimum guarantee (the major funding source for K-12 funding in California) from \$60.9 billion in 2014-15 to \$65.8 billion in 2015-16. In addition, the LAO estimates that \$1.5 billion will be available this year (2014-15) for one-time purposes, which could include funding for Common Core among other possible programs. All of this points to a promising outlook for the state economy and growth in funding for education. This is not a time of cuts but a time of restoration, and teachers and school employees - many of whom took furlough days and pay cuts during the recession - deserve to benefit from our overall improved economic picture.*

Teacher Carrie Caudle then shared Emily's information about the improving fiscal condition of the Petaluma City Schools:

*In terms of how this improved economic picture impacts Petaluma, Petaluma City Schools saw its total revenue increase by \$3.6 million between 2012-13 and 2013-14. Between 2013-14 and 2014-15 total revenues are projected to increase by another \$2.5 million. In addition, Petaluma City Schools has more than enough money in reserves. The state requires that a district of this size maintain a reserve of 3 percent at all times. According to the 2014-15 approved budget, Petaluma City Schools would end this year with 11 percent in reserves. In terms of dollars, based on the 2014-15 approved budget, Petaluma City Schools is required to have approximately \$2.1 million in reserves. Again, according to the 2014-15 approved budget it has \$8 million. This is approximately \$5.9 million more than required by the state. While some portion of this is legally restricted, over \$5.7 million of the monies currently in reserves are not legally restricted dollars. Furthermore on the reserves issues, as part of the recently passed Proposition 2 a cap on district reserves was placed into law. This cap - while not enacted yet - places a limit on district reserves being no more than two to three times the state requirement. With 11 % Petaluma is well above this cap. While not a legally binding requirement yet, it is clear that the legislature, the governor, and California voters do not support districts hoarding money in reserves that could be better spent in our classrooms and supporting our teachers and school employees. Overall, Petaluma City Schools can afford to do better by its teachers. Teachers in this District have taken furlough days and foregone raises during the recession. With an improved state economic*



*My members are not valued in this District and it is shown over and over again, unfortunately. The leadership, which unfortunately also includes the board members, has clearly shown that teachers are less than second-class citizens in Petaluma. I asked for the board and the District to reevaluate their current policies.*

---Kim Sharp, President of PFT



*Close family connections matter greatly to me. My hope is that our District negotiators will do the same. They will financially support what they value...A successful businessman named Arnold Glasow once said, "one of the tests of leadership is the ability to recognize a problem before it becomes an emergency." I think we have an emergency.*

---Elizabeth Churilla,  
2<sup>nd</sup> Grade Teacher

*picture and a healthy reserve at the local level it is time for the district to negotiate in good faith with its employees. Petaluma can and should provide a fair raise to its teachers, allowing them to support their families and provide the best quality education possible for their students.*

## THE PROBLEM IS NOT JUST ABOUT COMPENSATION

### History of the Relationship Between the Teachers and the District

Many of the concerns expressed at the hearing were not just about the challenges the teachers confronted negotiating a salary increase. There is low morale among the teachers as well as the poor relationship between the District and its teachers. Kim Sharp, President of the Petaluma Federation of Teachers, testified about the history of the 'Trust Agreements' between the District and the Federation:

*Trust is fundamental to any relationship, business or personal. Trust is the easiest thing to lose and the hardest thing to rebuild. In 1983, Petaluma City Schools embarked on a journey of trust. Through a grant from the Stewart Foundation the District and the Federation developed some trust agreements that would be guiding philosophies of doing business in our district. In 1987, a trust agreement for K-12 staff development was written. In 1992 a trust agreement on shared-decision making and a guide for use was developed. And these are terms that are used constantly in our District by teachers and by administration. Those documents led to the development of our decision-making resource guide, which can be seen on the District's website. This is something that is the fundamental guiding of how we do business. Furthermore, in 1995 an agreement on core curriculum was developed. Now this is not Common Core, but core curriculum, which predates any state or federal idea of having a clear picture of the district outcomes for students. The Federation and the District at that time were true partners in collaboration and true visionaries. In 2000, an agreement on K-12 curriculum was developed. It is clear from these agreements that PCS was once dedicated to its teachers and students, was dedicated to collaboration, was dedicated to trust in all things. For these reasons I used to be so proud of Petaluma City Schools. We were the shining star of the county. Everyone looked to us as to what was best in education. I do not feel that this is still the case. And that is a very sad statement to make. The District administration is led by a non-educator, and the school board uphold none of these agreements. Even shared-decision making, which is included in our bargaining agreement (I have a copy for you) is rarely if ever followed. These are supposed to be our fundamental guiding philosophies of how we do business in Petaluma. The teachers believe in it. I am deeply committed to our trust agreement. I have been on the guiding board even before I was president of the trust agreement*



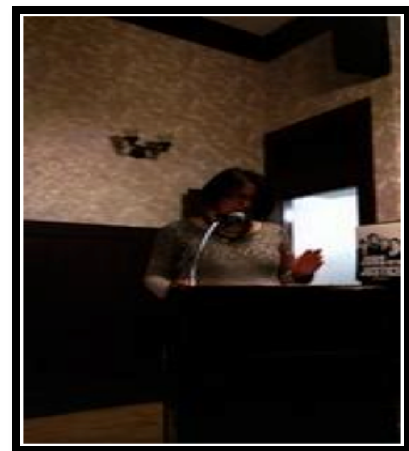
*committee, which oversees these trust agreements, making sure that this is how we do business. It has been frustrating. Not only has it been frustrating but it's disappointing that the very foundation of how we do business does not seem to be valued by our District.*

Veteran teachers expressed that morale is at an all-time low in the district. Kim Sharp, PFT President, shared her perspective on the District's treatment of the teachers:

*My own children attend our schools and I have never seen so much asked of our teachers with so little support and respect. People are fearful of their jobs of their positions. They are exhausted and they feel defeated. And that is not OK. We take care of the children of this District. We shouldn't feel this way. We should feel empowered; we should feel energized. We should feel OK to take risks, OK to disagree with our supervisor because we are the professionals in our classroom. There are administrators unfortunately at the District and at the site levels that are running their schools and I couldn't think of a better term than like a dictatorship instead of that partnership that was created so many years ago.... Our characters are also being attacked in the media by our own board members. How can hope survive in this environment? How can my members continue to deliver the amazing quality education when their leadership is lacking the ability to lead? My members are not valued in this district and it is shown over and over again, unfortunately. The leadership, which unfortunately also includes the board members, has clearly shown that teachers are less than second-class citizens in Petaluma. I asked for the board and the District to reevaluate their current policies.*

Additionally, complaints from teachers include concerns about poor-quality professional development initiatives that are perceived as a lack of support for teachers. Sandra Larsen, lead negotiator, spoke about ineffective professional development initiatives that have been facilitated by the District:

*Please don't think this is just about money but about respect-- quite frankly effective District leadership. Our professional development is unplanned and quite frankly useless. Programs are begun with no forethought and they are planned in the same manner. Our professional learning networks are a great example of that. I was at a District-level committee meeting last week when a District-level administrator told us that we were brain dead. Worse than the insult was a complete lack of organization and purpose for the meeting. Teachers like myself were taken away from their classrooms and their students, and there was nothing gained from the afternoon. This is not an isolated incident; sadly it is our new norm.*



*What sort of district do we want to be? What sort of future do we want to create? And do we want to be a district that shows strong support for its teachers, recognizing their commitment, the sacrifice, the time, the talents with equitable pay? That's the district I want. That's the district that I am willing to fight for and I suspect that that's the district that the teachers want as well.*

---Jackie Lebihan, Parent



*I have just recently learned of the personal stress they (teachers) are feeling in their workplace. But honestly, I'm not surprised that I didn't know. Because that is the kind of educators our teachers are. They are professionals. They are top-notch. They are dedicated. They are caretakers of our children. They would not let contract negotiations or an employment situation impact their classroom or their teaching.*

---Jen Newman, Parent

Elementary Teacher, Elizabeth Churillo, shared her concerns about the lack of support for teachers by the District:

*I need to be supported in my efforts. I need professional development that is well thought out and implemented and relevant for my grade and me. I need time to work with my colleagues on tasks that meet our needs. I need the District to value my level of professionalism and trust that is given some open-ended time that I know what needs to be done and I will do it. Teachers know what needs to be done and they will do it. They have been doing it all along. I want to do it. I want to lesson plan with my team. I want to create assessments. I want to differentiate instruction for my students. I want to get better at utilizing tech programs. I don't want to attend poorly organized and executed trainings. I don't need to be exposed yet to one more technology training that may or may not be relevant to my grade. Let me learn and explore the two or three that I know will be applicable. I want to be valued by my district.*

#### PETALUMA PARENTS WEIGH IN!

Parents are very concerned about the District climate and about the lack of support for the teachers. Jackie Lebihan, a parent of a District student, works in health care and provides leadership training. Jackie shared her observations about the leadership and the climate of the District:

*I work in health care. Health care is facing some very similar types of transformation that education is facing and some really big what we call wicked problems in health care. That calls for transformational leadership. There is a big distinction in what we call transactional leadership and transformational leadership. And what I am witnessing is an absence of transformational leadership. I want to sound the alarm bell...As I started talking to teachers and administrators what I heard was really alarming. I heard that teachers felt marginalized and that morale was at an all-time low. And I diagnosed it as a toxic work environment. I diagnosed that based on a lot of research in toxic environments and their implications on performance. Toxic work environments are characterized by environments where there is low psychological safety. I think that what our teachers are facing is working conditions where there is really low psychological safety. And I am very concerned about that. I think they feel a lack of respect and support from the District.*

Jen Newman, a parent of a student in Petaluma City Schools, shares her appreciation and support for the teachers:

*What we are talking about here is the people who are educating Petaluma's next generation of adults...should we be lucky*

*enough that they choose to stay. Why aren't we offering our teachers every benefit, empowering them, encouraging them and supporting them? I ask the members of our school board and District administrators to honor our teachers and give them the respect they deserve. Treat them as the professionals that they are. Give them a fair living wage. Honor the fact that they ARE the reason my child's experience at school is an amazing one. Because, really, our teachers know that it's all about the children. Let us please support the people who know that to be true.*

## PETALUMA TEACHERS MAKE A DIFFERENCE!

Corinna Leonardi, a Casa Grande High School Senior who plans to become a high school English teacher, shared her appreciation for the dedication of her teachers:

*I love my school. And I really love the teachers who taught me to love school in general. I am here tonight for this exact reason. Last year, during the beginning of the year, I was failing four of my six classes. Every single teacher pulled me in on his or her own time. And I got told to get my act together. After two hours of a parent-teacher conference with two of my mentors now, I understood why the teachers do exactly what they do.*

Jeanette Jin, another Casa Grande High student who had just learned that she had been accepted to Harvard University, also shared her appreciation for Petaluma teachers:

*This is something that I found in so many teachers in Petaluma. I have had so many great teachers. I have had so many great teachers and I cannot thank them enough for leading me on this pathway toward a great education. I can honestly say that the Petaluma City Schools' teachers are probably one of the best in the nation. They go beyond just what the standard education that you would think they would just be teaching. They are not just teaching mathematics, they are teaching valuable things that we use in our lifetime. Not only are they our teachers but they are our biggest supporters. When I was five years old, my father had a stroke and I spent my years growing up watching my father bedridden and watching my mother take care of my father. So the closest relationship that I had with anyone was with my teacher. She was like a second parent to me. It was so great to see how supportive she was of me. I can really say that teachers sacrifice so much of their time, resources, and energy for their students.*



*But they (teachers) do it because they care enough to take all kinds of students under their wing each and every year and care for them just as though they are their own...Parents and students may sometimes forget that these people who changed my life and my peers' lives every single day go home and they have their own lives too. This wear and tear of the conditions that they are in now may change all this. Believe it or not these teachers who act as super heroes on a daily basis, they can break too.*

---Corinna Leonardi, Student,  
Casa Grande High School

# BOARD FINDINGS AND RECOMMENDATIONS

## SHORT TERM ANALYSIS

### 1. FINDING:

During the 2014 negotiations between Petaluma City Schools' management and the Petaluma Federation of Teachers, the teachers requested a 4-percent cost-of-living adjustment. District management offered a 2.5-percent salary increase--a 1.5-percent difference. It is required that a local school district hold in reserve 3 percent of its annual budget. Petaluma City Schools as of December 2014 appears to be withholding 11 percent, which is 8 percent over the stated requirement. In terms of dollars and based on the 2014-15 approved budget, Petaluma City Schools is required to have approximately \$2.1 million in reserves. According to the same 2014-15 budget, the District has \$8 million in reserve, which is approximately \$5.9 million more than required by the state. While some portion of this is legally restricted, over \$5.7 million currently in reserve are not legally restricted dollars. As a result of the recent passage of Proposition 2, there is new law yet to be implemented that places a cap of no more than 2-to-3 times above the minimum requirement of holding a 3-percent reserve. Petaluma City Schools is well above this cap with 11 percent in reserves. The District has not prioritized a cost-of-living raise in seven years for teachers, despite the fact that during the recession, the teachers agreed to take furlough days and pay cuts. At the same time, the superintendent has received parity adjustments and other upgrades to his compensation package. Consequently, there is the understandable perception by many teachers that the District does not value its staff, and the superintendent seems to be unaware of the effect of his pay increases on staff morale.

### RECOMMENDATION:

In light of the passage of Proposition 30, the increased revenue to the state for K-12, the new legal cap on district budget reserves, and the compelling evidence that the District has the available funds, Petaluma City Schools should prioritize a modest raise for teachers of at least the 4 percent the teachers are requesting--without reducing the other benefits to teachers, such as their health-care package. In the calculation of any organization's budget, priority should be given to that which is most valued. **The greatest assets of any school district in meeting the needs of children are its teachers.** Thus every effort should be made to meet the salary needs of teachers, even if it should entail a reduction in the amount designated for budget reserves and perhaps the reduction in other line items in the annual budget. (See Long Term Analysis # 2C.)

### 2. FINDING:

As a result of the deteriorating relationship with the superintendent, the teachers' negotiating team requested that teachers at large, and not just those on the negotiating team, be allowed to observe the negotiation proceedings. Although there is past precedent for other teachers observing negotiations, the District management denied this request. In its public and private statements, the Petaluma City Schools' administration perceives only two alternative motives for the teachers' desire to observe negotiations between their union and the administration, namely either the teachers' distrust of their own negotiators, or their wish to intimidate the administration. The administration apparently cannot envision a third alternative that could explain teachers' motivation. In the testimony given by the teachers themselves, their motivation is basically to achieve transparency. Since these negotiations directly impact their personal lives, the teachers want to know exactly what transpires during negotiations. Unfortunately, this



dichotomous (either/or) perception on the part of the administration creates an adversarial atmosphere and has increased distrust between the administration and the teachers. (See Long Range Analysis # 2A, B.)

**RECOMMENDATION:**

The superintendent and the teachers should develop trust and achieve transparency by allowing teacher observers at negotiations. The superintendent should work cooperatively and creatively with the teachers to reach agreement on ground rules for allowing teachers to observe the negotiations. Teacher observers could help to restore trust and this far outweighs any potential problems caused by teachers observing the negotiations without understanding a complete history of negotiation sessions. (See Long Range Analysis #1.)

## **LONG TERM ANALYSIS**

**1. FINDINGS:**

There has been a major breakdown in the relationship and trust between the superintendent and the board and its District teachers. This lack of trust and the existing poor relationships create a negative work environment and unfair working conditions for the teachers. The superintendent compares the current union leadership with past union leadership and describes the relationship with past union leadership as being very positive. The superintendent views the current union leadership as inexperienced and adversarial in its approach to negotiations. The superintendent and board have decided that the current union leadership is to blame for the breakdown of negotiations--and this conclusion is used by the superintendent and the board to justify not taking responsibility for the stalled negotiations, and for not seeking real solutions to the problems pointed out by the teachers. In addition, a collaborative relationship of trust between the teachers and the District has been further frustrated by the District's failure to honor its Trust Agreement with the teachers. The trust agreement process was entered into in 1987, and from this effort a number of trust agreements were formally developed. One of these trust agreements is 'Shared-Decision Making', and as a consequence of that agreement, the 'Shared Decision-Making Resource Guide' was developed. Other trust agreements developed collaboratively. Other trust agreements were developed as the power of shared-decision making to enhance collegiality, improve collaboration, and, thereby, improve instructional practice became evident to all. Issues like "increased instructional time," as well as an "online grading system," though within the scope of collective bargaining, could have been decided using the shared decision-making process as had often been done in the past.

**RECOMMENDATIONS:**

- A. Re-establish a positive working relationship and rebuild trust and respect between the District and the teachers. District management should first recognize that the current union leadership consists of individuals who were elected by their teachers. The superintendent and board should take responsibility for their part in their relationship with the teachers. The superintendent and board should reach out to the teachers and look for opportunities to think positively and creatively to solve problems. The superintendent and board members should visit individual school sites and hold meetings with teachers in a safe environment without the site administrator being present. The superintendent and board should recognize that bringing in a mediator for negotiations will not likely improve the long-term relationship with the teachers.

- B. Honor the Trust Agreement and return to a shared decision-making model that makes teachers an essential component of the decision-making process. There should be a basic acknowledgement that teachers have the knowledge, the right, and the experience to participate fully in shared-decision making. The District should establish and facilitate committees in a way that there is teacher input and shared-decision making.
  - C. The assistant superintendent and other management staff need to be held accountable to facilitate effective communication and effective implementation of initiatives and tasks, particularly when these endeavors impact teachers.
2. FINDINGS:

The superintendent is well versed and highly experienced in the field of school finance. This is absolutely necessary for the efficient functioning of any school district. However, it should also be recognized by any school district management team, as well as the district school board members, that, important as the financial aspect of district management may be, it is not the primary function of any school district. The primary function of a school district is to provide the richest and most effective instructional program to its students, and central to that function are the classroom teachers. Our investigation revealed that many of the problems in Petaluma City Schools are caused by management using a business model, which is not appropriate for the administration of an educational community. A business/corporate model of administration is fundamentally flawed in administering the broad and complicated educational needs of a community. The business model operates in a top-down manner with the priority given first to a line-item budget. This narrowness of perspective vitiates the transparent, collaborative and cooperative administrative model that is needed to respond to the diverse educational needs of a community. In this regard, the Petaluma school board decided to seek a waiver from the state for credential requirements so that the superintendent could work in his current position. The superintendent, who previously worked as the chief business officer for the District, does not have experience as a teacher. He lacks the teaching and administrative credentials, which are required for his position. By seeking a waiver, the board appears to value the relationship with the superintendent and his experience above all other factors, which are important for the operation of an educational system. Moreover, the board appears to be unresponsive to other constituencies in the District--particularly teachers and many parents and students. Our assessment is that the board is not responsive to the concerns of teachers about how the District is being managed.

#### RECOMMENDATIONS:

- A. The school board should seek ways to broaden the District's leadership approach and improve the working relationship with teachers. In order to insure that this change occurs in a timely fashion, District management and the board should initiate a collaborative process, working with management team members, school board members, and teachers' union representatives to reinvigorate the 'trust agreement process.' This could be accomplished by bringing in consultants from the Association of CA School Administrators (ACSA), professional facilitation services, or some other agency mutually agreeable to the board, management, and the teachers' representatives. The superintendent and District management should be willing to recognize their own weaknesses and seek ways to improve and broaden their leadership approach. This effort can promote a positive District climate for professional improvement for all employees particularly when District management is modeling its own improvement.
- B. The school board should promote a shared-governance approach to managing the District and a shared decision-making process. There clearly is a need for greater transparency by the school board and easier access to school board

- members by the teachers and the community.
- C. The school board should utilize a collaborative approach to managing the District's finances. The District should periodically provide a transparent budget with accurate budget information, including a line-item budget. This will help to build trust and allow teachers to become part of the budget solutions. There should be more opportunity for teachers to become better educated on the District's budget challenges and provide more input on solutions.

## CONCLUSION

The breakdown of contract negotiations between Petaluma City Schools and its teachers is a symptom of a deeper problem---which is the ongoing deteriorating relationship between the superintendent and board on the one hand, and the teachers on the other. There is a serious lack of trust in the working relationship between the teachers and District management, and that lack of trust negatively impacts the District climate and working conditions for the teachers. The teachers are not receiving the respect that they deserve, as expressed by the unwillingness of the District to provide a modest salary increase and by the failure of the District to act with the teachers as partners in a shared-decision model that has been so much a part of the history of Petaluma City Schools.

There is an obvious need for trust between the board, management, and the teachers' union. However, for this to occur two conditions must be met. First, the interactions between board members, management and teachers must be respectful and collegial. The District cannot function, and the instructional program cannot be optimally effective, without this basic condition. All of the best educational research supports the concept that, as in the home, the relationships between adults operating in the schools can have dramatic effects on student performance. The highest performing school districts demonstrate collaborative relationships between school management and teachers. Second, for trust and collaborative relationships to evolve, the Trust Agreements and the trust process must be renewed. Both management and the teachers' union share certain critical aspects of the education process that they hold, mutually, "in trust." These critical aspects of the educational process go beyond those that are within the "scope of bargaining," such as professional development, implementing curriculum and school improvement efforts, and too many more to articulate that are everyday parts of the operation of the schools. It is a conscious agreement to which all the adults responsible for all the children and all of the learning processes should commit themselves irrevocably.

It is apparent that a dysfunctional cycle of accusations and recriminations has taken hold of the educational community in the Petaluma City Schools. The relationship between both groups can be improved if each side can take responsibility for its part and act to improve the relationship. The superintendent and board should recognize that the union leadership is democratically elected and that both union leadership and the membership have legitimate concerns about how the District is governed. The superintendent, who served as the chief business official for the District, is perceived by the teachers as not understanding the teachers' experience as educators, not sharing the pain of the past budget cuts, and not valuing the teachers. As teachers struggle to address their needs, the superintendent often views the teachers' reactions to his actions as being adversarial. This has caused an escalation in the reactions from both sides. Again, District leadership needs to seek a different paradigm for perceiving the motives of teachers as well as a broader leadership approach for managing the District. Finally, the teachers and their representatives have a shared responsibility with management (and the board) to insure that this cycle of recriminations is broken. It is therefore incumbent upon District management and the

board, based on improved state funding and the likelihood that it will continue in the foreseeable future, to break the "logjam," return to the table, and, in good faith, exhibit a willingness to work collegially with the teachers (and visa versa), complete bargaining on a 4-percent salary increase, and begin the process of restoring trust to Petaluma City Schools.



*The Workers' Rights Board gives workers a voice in telling their stories where they would otherwise not adequately have this opportunity. It is designed to put a public spotlight on a problem to help workers resolve conflicts with employers and to address the imbalance of power which results in a lack of respect toward workers.* – North Bay Workers' Rights Board Chairperson, Matt Myres

## THE WORKERS' RIGHTS BOARD

The Workers' Rights Board is a public forum where workers can bring complaints against employers for violating their human and legal rights in the workplace. The Board is particularly concerned with protecting the rights of low wage workers, who are often women, immigrants, young workers, and workers of color as they strive for justice in their workplaces.

The Board is composed of 11 community leaders who intervene with employers and the public to help resolve situations that threaten workers' rights. The Board believes that safe, living wage jobs, where workers are not discriminated against for speaking up for their rights, are the backbone of any healthy community. To accomplish its goals, the North Bay Workers' Rights Board will attempt to resolve issues in a variety of ways.

Workers' Rights Board activities may include:

- \* Meeting with employers who have been accused of violating workers' rights or resisting efforts of workers to have a voice in the workplace.
- \* Holding public hearings or press conferences to expose injustices to public scrutiny.
- \* Supporting and strengthening the democratic rights of working people including the right to organize through community education.
- \* Establishing community standards about fairness in the workplace and corporate responsibility.

## NORTH BAY WORKERS' RIGHTS BOARD MEMBERS

Jeanette Ben Farhat  
Political Science Instructor  
Santa Rosa Junior College

Lisa Maldonado  
Executive Director  
North Bay Labor Council

Alicia Sanchez  
Community Activist,  
Director, Bilingual Radio

Julie Combs  
Santa Rosa City Council

Daniel Malpica  
Professor, Chicano Studies  
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Francisco Vazquez  
Professor, Hutchins School  
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Rev. Raymond Decker  
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Matt Myres  
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