

From Combat to Collaboration

The Labor–Management Partnership in San José Unified School District

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It started with a cup of coffee. Newly minted superintendent Linda Murray had punctuated her first collective bargaining process in San José Unified School District (SJUSD) with the eleventh-hour signing of a contract that narrowly averted a teacher strike. Poised to move forward, Murray instead confronted a message the next day from the San José Teachers Association's (SJTA) executive director declaring that the union was not happy with the settlement, and was already preparing to go back to the bargaining table and return to the fight.

Exhausted and frustrated, Murray called SJTA President Mari Jo Pokriots and asked to meet for coffee. The two leaders found common ground in their frustrations with the existing district–union relationship and agreed to work together to chart a new path. So began a collaborative endeavor that has continued to grow and evolve for the past 24 years, and is now stronger than ever.

Against the backdrop of media accounts of adversarial labor–management interactions, San José stands out as an example of district leaders and their labor partners working together to advance a mission of teaching and learning. Their story of collaboration suggests a very different kind of relationship than the common narrative would have us expect; the San José experience offers lessons for other district and union leaders seeking to create a similar dynamic.

From Combat to Collaboration

In San José, that conversation over coffee became the first of many, and the two leaders formalized their ongoing communication through weekly check-ins designed to resolve issues before those issues came up through the grievance process or at the bargaining table. Slowly but surely, regular interaction began to transform what had been highly combative debates around the bargaining table into mutual problem-solving sessions. As time went on, several key decisions helped to deepen and expand a new kind of relationship:

Salary formula: Shortly after Murray's tenure began, SJUSD and SJTA introduced a salary formula into their collective bargaining agreement that reserved two thirds of the district's unrestricted general fund for teachers' compensation and benefits. By taking one of the most contentious issues in the bargaining process off the table, the formula freed the district and union to focus their attention on matters of teaching and learning.

Choosing leaders to keep building the relationship: SJSUD and SJTA leaders alike created deliberate succession plans to ensure that subsequent leaders would prioritize collaboration. New superintendents and union presidents committed to continuing and growing the partnerships facilitated by their predecessors. At the same time, leaders also made

critical decisions to transition key “hardliners” opposed to collaboration out of their roles.

Creating a substantive SJTA decision-making role:

The district created formal roles and responsibilities for union leaders and members, giving SJTA a voice in important district policies. Perhaps most notable was the decision to make the SJTA president a member of the superintendent’s cabinet in 2010.

The Relationship Today

The structures and dynamics established over years of work together remain in place, and leaders from both organizations describe the relationship with a range of positive attributes—the most frequent being “collaborative.” This collaboration plays out at the bargaining table; interviewees described district–union negotiations as a process of collective problem solving. It also happens through extensive communication—from daily text messages and phone calls among SJUSD and SJTA leaders to shared messaging delivered to a broader set of external stakeholders.

Although leaders from SJUSD and SJTA speak highly of their relationship, they disagree frequently and passionately. What holds the relationship together through dissatisfaction and disagreements are the norms that guide it. Both sides are committed to acting in the best interest of students. Both sides are committed to finding solutions. And both sides are committed to debating issues without attacking individuals—to respecting one another despite differences of opinion.

Why the Relationship Matters

Any story where people learn to get along better has its appeal, but respondents believe that the relationship between the district and union matters because of what it enables them to do: better serve students. First and foremost, SJUSD and SJTA leaders

can spend their time more efficiently. Freed from the demands of preparing and responding to grievances, navigating contentious school board meetings, participating around a hostile bargaining table, and surviving work stoppages, leaders can dedicate their time and energy to issues directly relevant to the overall district mission of serving students.

Leaders in San José also argue that incorporating multiple perspectives into decisions through a collaborative partnership helps the district create better policy. By taking into account the ideas and experiences of the teachers who will bring any new ideas to life in the classroom, the district can design stronger programs that are more likely to succeed. Districts and their labor partners can improve the implementation of new ideas as well. Interviewees in San José noted that when teachers are involved in the creation of new policy, they are more likely to buy in to that policy, increasing the likelihood that it will actually make a difference for students.

SJUSD and SJTA leaders also described the benefits of the productive relationship in providing flexibility and preventing small issues from derailing a shared agenda—especially in times of crisis. Interviewees recalled the district’s response to the 2008 recession, in which the district and union worked collectively to solve problems rather than impose unpopular decisions.

If the relationship in San José has enabled a clear focus on instruction and student learning, and has promoted more effective policies and facilitated the implementation of those policies, we might reasonably expect improvements in classroom instruction that should translate to improved student outcomes. Although it is beyond the scope of this report to assess any causal connections along these lines, SJSUD has demographics quite similar to those of California as a whole, and compares favorably to the state on key measures for student achievement and





high school attainment (and has for many years). Nevertheless, the district still has a long way to go for all of its students to achieve academic success. District leaders expressed optimism that the relationship has positioned them well to take the next step in addressing instructional quality and advancing great teaching throughout the district.

Facilitating Factors

Much of the report describes the evolution of the SJUSD–SJTA relationship over time and how the two partners' collaboration has advanced the overall district agenda. But what makes it all possible? Above all, the work between the district and union revolves around a shared goal, which leaders on both sides most frequently characterize as “doing what is best for kids.”

Under the umbrella of a shared goal, formal policies and structures help to foster collaboration. The district's salary formula helps circumvent the teacher salary negotiations that typically divide districts and unions, enabling SJUSD and SJTA to spend their time and energy on issues of substance. SJTA's formal decision-making responsibilities in several key groups—from the president's seat on the superintendent's cabinet to roles in decision-making bodies like the Contract Advisory Committee and the Teacher Quality Panel—also facilitate a productive relationship.

Beyond an overall focus on student needs and a set of formal policies and responsibilities, SJUSD and SJTA operate according to a set of unwritten norms that foster trust and respect. Among these are a problem-solving orientation, a willingness to advocate without being positional, a practice of frequent and transparent communication, and a commitment to keeping promises to one another.

The long tenure that many of the SJUSD and SJTA leaders have had with the district, and the deep

knowledge this has brought, further facilitates the productive relationship between the two. Stable leadership in both the central office and the union has helped facilitate continuity over time. This longevity has helped leaders throughout the system build personal connections and practices that support the partnership. In addition, interviewees reported that SJTA leadership positions have increasingly been filled by exemplary teachers, which helps advance a focus on teaching and learning.

Lessons for Other Districts

The district–union relationship in San José has evolved over many years in a specific context, and the arc of that process does not create a roadmap that other districts can blindly follow. However, the San José experience presents several lessons for administrators and union leaders in other districts, regardless of circumstance.

Start somewhere. The first lesson is to start *somewhere*. In San José, it was a cup of coffee and a conversation. Districts and their labor partners will not achieve perfect harmony overnight, and even the relationship in San José is in a constant state of evolution. A collaborative and productive relationship is a long-term endeavor, and it may start with small and seemingly insignificant steps in the right direction.

Commit to regular communication by designating specific meeting times. District union leaders should consider looking for ways to establish and protect time for regular communication. In San José, frequent interactions between SJUSD and SJTA leaders enable them to address challenges before they balloon into crises. They also help leaders understand one another's motivations and constraints, build trust, and see opportunities for compromise. Even in an environment where trust between the district and union has not yet been

established, establishing and honoring regular meeting times can help get the ball rolling.

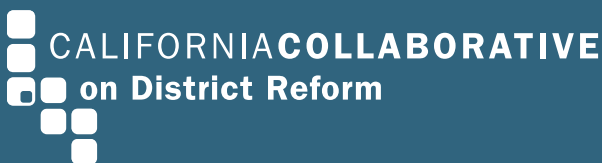
Create opportunities for teacher contributions.

District leaders should also consider developing formal vehicles for teachers to make substantive contributions to district decisions. Doing so can help create better policy and build buy-in for that policy. Creating the space for formal decision-making roles also has symbolic importance in demonstrating that teachers have a valued role in the district. Teachers unions can play important roles in creating spaces for participation in decision making and identifying participants whose knowledge, skills, and orientation to collaborative work promote productive solutions.

Cultivate current and future leaders. Finally, districts and their labor partners can facilitate strong relationships by positioning the next generation of leaders to continue meaningful collaboration. Hiring and supporting leaders with experience in the district—and the historical and contextual perspectives that experience provides—

can help to continue forward progress. Personality and commitment to collaboration might also be important characteristics for leaders who will carry a relationship into the future. Importantly, succession planning involves not only the next organizational head, but leaders throughout the system, including those in key roles at the site level.

In the end, San José offers hope to other districts and unions seeking to develop a more productive relationship. Its starting point was as dysfunctional as any district around; if this district can come this far from rock bottom, perhaps others can too. This kind of partnership cannot be created unilaterally—it requires both sides to commit to working together. But if leaders are willing to make the effort, San José offers ideas that can spark progress. And if San José and other districts can capitalize on the opportunities created by productive collaboration, there is a promising path forward to meet the needs of the students entrusted to their care.



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