

**NEA Leadership Development Case Study:**  
**The 2015 Restructuring of the Wisconsin Education Association Council**  
**Summer Leadership Academy**



## INTRODUCTION

In 2015 the Wisconsin Education Association Council (WEAC) received a teacher leadership grant to underwrite their WEAC Summer Leadership Academy Retreat Project. The purpose of the project was to *help locals develop and keep strong leaders [emerging and established] by restructuring the Summer WEAC Leadership Academy*. Through this project WEAC was able to focus on providing a more in-depth leadership experience for its members.

This case study provides an overview of the process and tools WEAC utilized and developed to strengthen its Summer Leadership Academy. This piece is not exhaustive in nature, but a snapshot intended to provide affiliates with an opportunity to reflect upon their own leadership development opportunities and to determine whether or not elements of the WEAC experience — including tools and templates — might apply to their context.

This case study consists of the following sections:

1. WEAC Context
2. Project Planning
3. Curriculum Writing
4. Implementation
5. Findings and Moving Forward
6. Appendices
  - Appendix A: Project Planning
  - Appendix B: Curriculum Writing

If you would like to learn more about the WEAC Summer Leadership Academy Retreat Project please contact [leadersdevelop@nea.org](mailto:leadersdevelop@nea.org).

*A special thank you...*

*The NEA Leadership Development team would like to thank the Wisconsin Education Association Council (WEAC) for sharing its learnings and tools from this project.*



## 1. WEAC CONTEXT

The membership loss for WEAC in recent years was significant, and for that reason WEAC felt it was necessary to shift their thinking in how they planned and presented leadership development training. With their affiliate goal in mind – *to help locals develop and keep strong leaders* – and the enthusiastic support of their board of directors to utilize the NEA Leadership Competencies, WEAC embarked on a leadership development journey to restructure its annual Summer Leadership Academy. WEAC's hope was to

- Develop a strong, committed, and capable core group of trainers from within the ranks of existing leadership.
- Create a focused, intensive, and rigorous training for emerging and established leaders.
- Develop leadership skills focused on enhancing the quality of public education to assist in the development and implementation of a proactive agenda that engages members and leads to success for every student.
- Strengthen WEAC locals and by doing so strengthen WEAC and NEA.
- Develop plans to address membership growth and retention.
- Connect state officers in the plan through curriculum writing and follow-up with locals that participate in the training.



## 2. PROJECT PLANNING

When conceptualizing the Summer Leadership Academy project, WEAC identified a set of key questions and things to consider.

### Key Questions

**How do we ensure that there is strong representation at the Summer Leadership Academy from locals across the state? And, what should our target number be?**

*WEAC Response:* Utilize presidents and officers with a set goal of identifying 35 locals (from 8 regions) to participate.

**How do we recruit current established leaders to serve as trainers?**

*WEAC Response:* Recruit and identify strong leaders utilizing officers and management and establish an application process for acceptance.

**What is the role of the Executive Director in this project?**

*WEAC Response:* Identify staff (professional and associate) that can assist in writing the curriculum modules and work with officers in identifying locals and trainers.

**What is the role of the association officers in this project?**

*WEAC Response:* Participate in the training; work with WEAC management in identifying locals and leaders as trainers; serve on a curriculum writing module team; and follow-up after summer training with the participating locals.



## Things to Consider

### **What project measurement should be considered?**

*WEAC Response:*

1. Membership Growth within the 35 locals
2. Attendance of the targeted 35 locals at the WEAC Representative Assembly
3. Survey participants at the conclusion of the training, six months after the training, and one year later
4. Follow-up communication by WEAC Officers on a regular basis (divide the locals by the 3 officers)

### **What data will help with planning this project?**

*WEAC Response:*

- Current WEAC Membership numbers and potential members by Regions
- Board minutes – board directed use of Leadership Competencies (Note: Having Board approval to leveraging the Leadership Competencies in this capacity proved to be an important aspect of this project)
- NEA Polling for WEAC

### **What needs to be considered before developing the curriculum modules?**

*WEAC Response:*

- What other states have utilized the NEA Leadership Competencies for training?
- What do we have in our archives that we could use?
- Utilize the six NEA Leadership Competencies with a specific focus on progression Level 2: Mobilizing & Power Building.
- Create templates for each of the modules (lesson-plan style, see section “3. Curriculum Writing” for examples)

Templates developed by WEAC specific to project planning are available in Appendix A: Project Planning, they include:

- Key Questions
- Things to Consider
- “Local Identification – Selection of Locals to participate” tool



### 3. CURRICULUM WRITING

In advance of the Summer Leadership Academy, WEAC organized a two-day retreat designed to bring together teams – a cadre of twenty-six established leaders - to plan and write curriculum modules, as well as prepare to deliver the content as trainers. Leaders who were interested in acting as trainers were asked to submit an application to the WEAC Executive Office.

The modules – designed to be implemented during the Summer Leadership Academy – were guided by the NEA Leadership Competencies and intended for emerging and established leaders. As a result of the planning meeting, a competency-based lesson plan template and lessons were developed (available in Appendix B: Curriculum Writing).

Following the planning retreat each team was expected to organize a conference call prior to the WEAC Summer Leadership Academy. The conference call was guided by the following:

1. Discuss curriculum logistics
2. Determine who will lead what
3. Ensure team arrives early to plan, prepare, and practice
4. Other ideas

The retreat and subsequent conference call amounted to approximately 12 hours of curriculum planning and writing.

Templates specific to this section are available in Appendix B: Curriculum Writing, they include:

- Trainer and Curriculum Writer Application
- Lesson Plan Template
- Lesson Plan Sample – Leading Our Profession

There are six NEA Leadership Competencies, they are: Advocacy, Business, Communication, Governance and Leadership, Leading Our Professions, and Organizing. To download the NEA Leadership Competencies Guide please visit [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment).



#### 4. IMPLEMENTATION

The four-day Summer Leadership Academy — facilitated by the curriculum writers and trainers — consisted of fifty WEAC emerging and established leaders. The Academy participants experienced a series of trainings sessions, whole-group presentations and discussions, and networking opportunities. The participants were divided into two groups — “A” and “B” — to experience the training sessions. Below is a skeleton-schedule of the activities for the Academy.

Day	Activity
1	Registration Welcome <b>Training Session</b> <ul style="list-style-type: none"> <li>• <b>Group A: Module 1 – Advocacy</b></li> <li>• <b>Group B: Module 2 – Business</b></li> </ul> Break <b>Training Session</b> <ul style="list-style-type: none"> <li>• <b>Group A: Module 2 – Business</b></li> <li>• <b>Group B: Module 1 – Advocacy</b></li> </ul> Break Dinner/Guest Speaker Networking Opportunity
2	Breakfast Training Session <ul style="list-style-type: none"> <li>• <b>Group A: Module 3 – Communication</b></li> <li>• <b>Group B: Module 4 – Governance &amp; Leadership</b></li> </ul> Break Training Session <ul style="list-style-type: none"> <li>• <b>Group A: Module 4 – Governance &amp; Leadership</b></li> <li>• <b>Group B: Module 3 – Communication</b></li> </ul> Lunch Training Session <ul style="list-style-type: none"> <li>• Membership</li> </ul> Recreation Activity (6 groups formed) Dinner Film and Discussion
3	Breakfast <b>Training Session</b> <ul style="list-style-type: none"> <li>• <b>Group A: Module 5 – Leading Our Professions</b></li> <li>• <b>Group B: Module 6 – Organizing</b></li> </ul> <b>Team Work</b> <ul style="list-style-type: none"> <li>• <b>Local teams begin their “back-home plan”</b></li> </ul> Lunch <b>Training Session</b> <ul style="list-style-type: none"> <li>• <b>Group A: Module 6 – Organizing</b></li> </ul>



	<ul style="list-style-type: none"> <li>• <b>Group B: Module 5 – Leading Our Professions</b></li> </ul> <p>Break</p> <p><b>Team Work</b></p> <ul style="list-style-type: none"> <li>• <b>Local teams continue to develop their “back-home plan”</b></li> </ul> <p>Dinner/Panel Discussion</p> <p>Networking Opportunity</p>
4	<p>Breakfast</p> <p><b>Team Work</b></p> <ul style="list-style-type: none"> <li>• <b>Local teams complete their “back-home plan”</b></li> </ul> <p>Lunch</p> <p>Closing/Keynote Address</p>

Following the Summer Leadership Academy trainers reconvened to share their experiences, consider input from participants and others, and to make changes to their curriculum and delivery approach.



## 5. FINDINGS AND MOVING FORWARD

As a result of this project, 50 WEAC members participated in the Summer Leadership Academy. All participants received certificates of completion in basic NEA Leadership Competencies, departed with plans for their locals to be executed in the subsequent school year, and all were connected with a state officer for follow up and support throughout the year. Participant feedback indicated the following:

- This approach to leadership development is a marked departure from past leadership summits
- Training teams were balanced to reflect leaders from all sizes and backgrounds of locals
- The size of the training cadre was ideal for one-on-one attention between trainers and participants, as well as to enable small-group planning
- Participants should be made aware of the level of engagement and hands-on work it requires
- Local leaders need help on the front-end in mapping and building a team to participate
- Two academies should be considered, one for teams of 2+ leaders and one for individuals

Overall, three preliminary successes in the area of leadership development were realized.

1. **Making it real.** WEAC's Summer Leadership Academy engaged local leaders in writing a curriculum for the NEA Leadership Competencies. This ensured that the lessons and expected outcomes were related to the life experiences of WEAC educators.
2. **Putting it in action.** Participants created a take-away plan at the conference. Each emerging leader now has a specific, measurable, attainable, realistic and timely plan of action incorporating the NEA Leadership Competencies.
3. **Building relevant relations.** WEAC state officers are now connected to a base of emerging local leaders and are committed to maintaining that relationship. State officers will be mentors, gauging movement on the plans, celebrating successes on the statewide or national levels, and offering help when problems arise.

Continued engagement of participants is critical to the project's long-term success. WEAC identified the following strategies to help ensure engagement and project sustainability.

- **State Officer Engagement:** Each participant was connected with one of three WEAC state officers. Each officer was charged with following up with participants utilizing established intervals (30 days, 120 days, 270 days). State officers were also asked to serve as points of contact/mentors for leadership to provide advice as needed.
- **Voter Activation Network (VAN):** All participants were added to the VAN and were coded to reflect their level of leadership skill (emerging/advanced/trainer). This will help build a corps of leader mentors and NEA Leadership Competency trainers throughout Wisconsin and will be available to the NEA and its state affiliates.
- **Trainers:** Trainers will be dispatched around the state to regions and locals in need of any specific leadership competency training, and will be plugged into any training opportunities available through the state or NEA related to their area of curriculum.



WEAC intends on refining and expanding its leadership development opportunities, these include:

- Summer Leadership Academy – Level 1: This opportunity, which was the focus of this case study, will continue for emerging and established leaders.
- Summer Leadership Academy – Level 2: This opportunity is an extension of Summer Leadership Academy – Level 1, participants who completed Level 1 will be invited to attend.
- Road-Show Presentations: In the coming years WEAC plans on providing Level 1 leadership opportunities via “Road-Show” presentations at the regional and local levels. Initially WEAC hopes to lead 10 regional and 5 local presentations; eventually they would like to provide a catalogue of presentations available to the regions and locals.

*The NEA has a suite of leadership developments resources available to educators, these include*

- Instructional modules;
- A self-assessment;
- Curriculum outlines; and
- Member leadership opportunities.

To access these and other resources, please visit [www.nea.org/leadershipdevelopment](http://www.nea.org/leadershipdevelopment).



6. APPENDICES

Appendix A: Project Planning

Key Questions

How do we ensure that there is strong representation at \_\_\_\_\_ [*insert leadership opportunity*] from locals across the state? And, what should our target number be?

*Response:*

How do we recruit current established leaders to serve as trainers?

*Response:*

What is the role of the Executive Director in this project?

*Response:*

What is the role of the association officers in this project?

*Response:*



## Things to Consider

**What project measurement should be considered?**

*Response:*

**What data will help with planning this project?**

*Response:*

**What needs to be considered before developing the curriculum modules?**

*Response:*



## Local Identification — Selection of locals to participate in Association leadership opportunity

### *Sample talking points for inviting local affiliates to state Association leadership opportunity*

- I'm calling to encourage and invite your local leadership to attend the *[insert title of leadership opportunity]*.
- The focus for the *[insert title of leadership opportunity]* will be *[insert focus of leadership opportunity]*.
- Your local has been identified as a local that we hope will participate. *[Insert state Association name]* will cover *[insert expenses that will be covered]*.
- Our goal at *[insert state Association name and goal]*. We value the work leaders like you do on a day-to-day basis. We want to act as a support for you and your leadership team.
- Built within the training modules will be a plan to address membership growth and retention.
- Training will focus on the NEA Leadership Competencies (Advocacy, Business, Communication, Governance and Leadership, Leading Our Professions, and Organizing). Time will be spent learning the competencies and how they apply to you as a local leader. There will also be time spent with your team of local officers — we are hoping you would be able to bring a team of two to five (or more) members from your local. We have training, food, and fun all planned for this exciting event.
- Dates for the event are *[insert dates]* and will be held at *[insert location]*. This event will definitely be worth your time, and the best part is that *[insert state Association name]* will cover the expenses.
- I'd like to be able to connect with you face-to-face to talk more about this opportunity for your local. Can we set up a time — I'm able to come visit with you and perhaps other local leaders?



Contact Sheet Template

Local: \_\_\_\_\_

Name of Local Leader: \_\_\_\_\_

Phone Number: \_\_\_\_\_

First Contact Phone	Second Contact Email and/or Phone	Third Contact Email and/or Phone
No answer, but left a message.	No answer, but left a message.	No answer, but left a message.
No answer and no way to leave a message — will email and call again.	No answer and no way to leave a message — will email and call again.	No answer and no way to leave a message — will email and call again.
Answered — set up a meeting.	Answered — set up a meeting.	Answered — set up a meeting.
Answered — not a leader anymore.	Answered — not a leader anymore.	Answered — not a leader anymore.
Answered — didn't seem receptive of the idea.	Answered — didn't seem receptive of the idea.	Answered — didn't seem receptive of the idea.

**Response:**

Meeting set-up for: \_\_\_\_\_ (date)

\_\_\_\_\_  
(location, including address)

Will there be anyone else attending the meeting?

\_\_\_\_\_  
\_\_\_\_\_





## Appendix B: Curriculum Writing

### Trainer and Curriculum Writer Application

Name(s): \_\_\_\_\_

Local: \_\_\_\_\_

Contact Information (*phone and email*): \_\_\_\_\_

Are you a member of [*insert State Association*]?      ( ) YES      ( ) NO

The [*insert title of leadership opportunity*] will focus on the NEA Leadership Competencies. Please mark all of the competencies that you feel you have knowledge of and experience with:

**( ) Advocacy:** Advances the cause of public education through social justice and how it benefits our students and members' professional needs and rights.

- Leverages advocacy practice
- Engages community around issues supporting student learning
- Interprets and acts on social justice initiatives
- Leads public education policy reform
- Acts as a political advocate

**( ) Business:** Builds the brand and accomplishes the goals of the association through effective financial management and understanding of fiduciary responsibilities.

- Acts strategically to support the association's value proposition
- Manages budget development and business policy
- Promotes stewardship and financial integrity of the organization
- Manages risk
- Utilizes data and analyzes trends to inform decision making

**( ) Communication:** Builds an integrated communication strategy that drives the goals of our professions.

- Develops a two-way strategic communication plan
- Uses current media, technology and social networks to communicate
- Develops communication approach and style to fit appropriate audience
- Acts as an effective speaker
- Acts as a compelling advocate for the organization
- Identifies appropriate messenger(s)



**( ) Governance and Leadership:** Sets the mission and establishes strategies necessary for a relevant and thriving organization; empowers, motivates, and fosters a pipeline of talent for the future.

- Effectively executes governance and leadership responsibilities
- Establishes and maintains collaborative, effective relationships
- Advances the organization by internalizing its mission, vision, and core values
- Sets strategic objectives to guide long-term goals
- Develops self and others as leaders

**( ) Leading Our Professions:** Advocates for quality inside our professions and promotes our union's role in advancing education transformation and student learning.

- Builds capacity for continual improvement and learning
- Shows educational leadership and understands union's role in student learning and leading our professions
- Advocates for policies and strategies that positively impact our professions and student learning
- Analyzes and applies research, policies and trends to determine potential impact on our professions and student learning

**( ) Organizing:** Mobilizes to influence successful organizing outcomes, strengthen internal and external relationships and membership capacity; as well as recruit and identify new members and potential leaders into the association.

- Utilizes organizing best practices
- Builds meaningful community partnerships
- Makes strategic plans that rely on data and analysis
- Engages in collective action to identify and address pivotal issues
- Creates conditions for continuous association growth and strength
- Fosters the development of leaders at all levels of the organization

Please answer the following question on a separate sheet of paper.

1. What experiences you have had as a union leader?
2. How has your leadership enhanced your local?
3. Will you serve as a trainer to develop leadership skills for our members?



## Lesson Plan Template

<b>Title:</b>	
<b>Competency Domain:</b>	
<b>Competency Theme:</b>	
<b>Learning Outcomes:</b>	
<b>Classroom Time Required:</b>	
<b>Materials Needed:</b>	<b>Technology Resources Needed:</b>
<b>How will level 1 be addressed?</b>	
<b>Pre-Activities:</b>	
<b>Introduction:</b>	
<b>Activities:</b>	
<b>Assessment:</b>	
<b>Modifications:</b>	
<b>Supplemental Information:</b>	
<b>Follow-Up:</b>	



Lesson Plan Sample – Leading Our Professions

<b>Title:</b> Promoting Meaningful Professional development	
<b>Competency Domain:</b> Leading Our Professions	
<b>Competency Theme:</b> Builds capacity for continual improvement and learning.	
<b>Learning Outcomes:</b> Advocates for meaningful development inside our professions, thereby energizing members and our diverse set of education stakeholders.	
<b>Classroom Time Required:</b> Approximately 30 minutes	
<b>Materials Needed:</b> Whiteboard and markers Sticky-notes, flipchart, and markers Pens/pencils Notecards Handouts: My Professional Development Experience, Circle of Influence Google Slides Presentation	<b>Technology Resources Needed:</b> Projector/Laptop (Interactive Whiteboard is ideal) Extension cords/power strips Internet access Word cloud website
<b>How will level 1 be addressed?</b> Discussion and research of quality PD	
<b>Pre-Activities:</b> None	
<b>Introduction:</b> (3 min) Describe your PD experience:  “My past professional development experience has been _____.”  “My ideal professional development experience would be _____.”  Participants fill in the sheets of paper with these questions on it. These will be collected and used to make word clouds for use later in the lesson.	
<b>Activities:</b> <ol style="list-style-type: none"> <li>1. Discussion on quality PD (10 min)</li> <li>2. Present research on the impact of continual improvement and professional learning on student learning, as well as the potential impact of policies and trends on public education. (2 min)</li> <li>3. Discuss circle of influence and have members complete the diagram. (2min)</li> <li>4. Using the word clouds as a reference of where they are at and where they want to be as far as PD; discuss at tables how to use information from the circle of influence diagrams to promote professional issues in your area. (5 min)</li> </ol>	
<b>Assessment:</b> One reporter from each table to summarize on chart paper. (Collect and display)	
<b>Modifications:</b> NA	
<b>Supplemental Information:</b> NA	
<b>Follow-Up:</b> NA	

