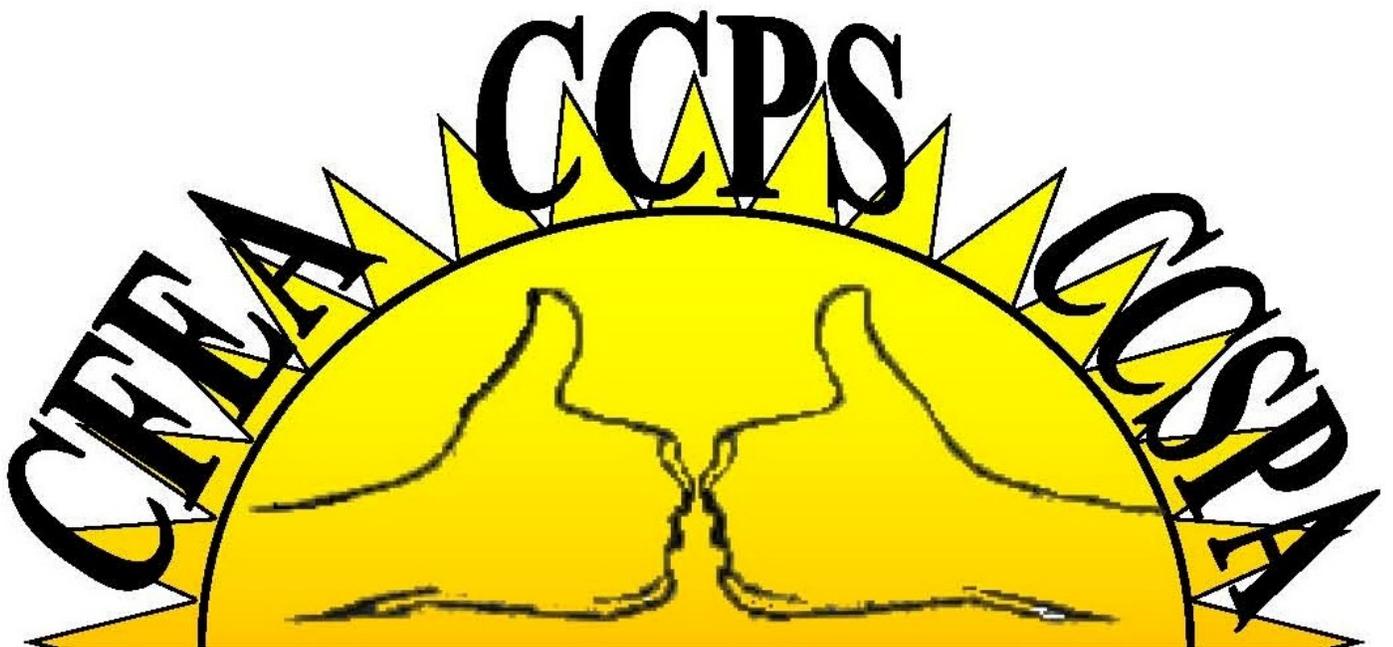


PARTNERSHIP AND
PERFORMANCE IN



CHARLOTTE COUNTY
PUBLIC SCHOOLS

Charlotte County
District Leadership
2019-2020

School Board

Bob Segur District 3
Board Chairman

Wendy Atkinson District 5
Board Vice Chairman

Kim Amontree District 2

Cara Reynolds District 1

Ian Vincent District 4

District Office Administration

Steve Dionisio
Superintendent

Patrick Keegan, EdD
HR Assistant Superintendent & Employee
Relations, Equity Coordinator

Jerry Olivo
Assistant Superintendent
District Support

Cheryl LaPorta Edwards,
Assistant Superintendent of Learning

Mike Desjardins, EdD
Assistant Superintendent
Student Support Services

Charlotte FEA

Officers:

President Renee Wiley

Vice President John Jordan

Secretary Kathy Casale

Treasurer Gina Morella

**Charlotte County Support
Personnel Association**

Officers:

President Mark Holt

Vice President Robby Goldstein

Secretary Gina Pennybacker

Treasurer Marie Martineau

Executive Director Sharon Sutherland

Charlotte County Public Schools and both professional organizations representing their employees, Charlotte FEA and Charlotte County Support Professionals Association, began a movement away from the traditional, adversarial method of interaction with a conscious decision by both District and Union Leadership. Under the guidance of then-Superintendent Dave Gayler and then Assistant Superintendent of Learning Dr. Doug Whittaker and Presidents John Klenovic and Bobby Zipf, a move to Interest Based Problem Solving took place.

Shepherded by then Union Executive Director Chuck Richards, the District and Unions began working to train administrators, teachers, and support personnel in IBPS processes and application. This training, facilitated by the Federal Mediation and Conciliation Service, took place over several months and is still a part of the training offered to CCPS Administration and Employees today.

The Interest Based Problem Solving process began as a way to change the adversarial bargaining processes experienced by all sides. In a short time the mindset permeated nearly all aspects of interaction between Charlotte County Public Schools and both Charlotte FEA and CCSPA. Partnership and Performance Councils (PPCs) were established through contract negotiations for both groups to look into district-wide issues. The contract also called for the establishment of PPCs at each worksite, initiating a unique solution to issues that arose.

Each PPC is co-chaired by a teacher or support staff member and an administrator. The co-chairs set an agenda, run the meeting, and, following the collaborative nature of FMCS processes, solve problems with no one “side” pushing an agenda, but with all working together to achieve the solution that works best for each group.

Functioning PPCs have been in place since 2007 and in the last 10 years have gone through transitions but are still the preferred method for dealing with issues that arise in Charlotte County Public Schools. The collaborative nature of the relationship between all parties has allowed both sides to work towards common goals.

Mission Statement

Charlotte County Public Schools' focus on student success is based in a foundation of collaboration among adults who consistently support programs and services to and for those students. Members of the CCPS employee-family agree to work, collaboratively and cooperatively, to nurture a positive and high quality environment for all.

Stakeholders

Stakeholders commit to the common values of collaboration, communication, integrity, leadership, excellence, and safety. This commitment resonates in relationships that, in action, define Partnership and Performance Councils in our District.

Purpose

The purpose of this manual is to provide collaborative structure and direction to achieve our mission statement.

Key Leaders of the Initiative

CFEA President CCSPA President
School Board Members Superintendent

District Constituents

Unit I: Teachers

Unit II: Support

Unit III: Administrative

Unit IV: Confidential / Professional /Managerial

Key Elements of a Charter

At the first assembly of members of a newly-forming PPC, a discussion of the following points should inform initial dialogue for shaping the group's guiding articles of agreement.

- I. Purpose of the PPC:
Consider Available Samples as Starting Point
Note Well: NOT a Bargaining Function-Group
- II. Leadership: Co-Chairs
 - A. CFEA or CCSPA Co-Chair
 - B. Building Administrator or Unit-Leader Co-Chair
- III. Membership
 - A. Number of Members
 - B. Duration of Terms: 1, 2, 3 Years
 - C. Job Description-Representatives
 - D. Recording Secretary
- IV. Meeting Details
 - A. Frequency
 - B. Site(s)
 - C. Start Time
 - D. End Time
 - E. Duration
- V. Documents
 - A. Articles of Agreement
 - B. Meeting Record: Minutes
 - C. Electronic-Entry / Saving
 - D. Publication: Transparency at Site
For Those Not in Attendance
 - E. Agendas: Set by Co-Chairs in Advance of Meetings
 1. Call for Items between Meetings

2. Carry-Over Items from Last Meeting
3. New Items
4. Dated with Site
5. Published Widely before Meeting

F. Minutes

1. Kept, Electronically, for Each Meeting
2. Summarize, Clear / Items Considered
3. Report Consensus Decisions
4. Dated
5. Reference Location
6. Report Start Time and Adjournment Times
7. Identify Member-Attendees
8. Identify Visitors
9. Kept by Secretary
10. Posted to One Drive File for PPC or SPPC

VI. Frequency of Charter Review: e.g. at Least Annually:
Any Modification of Charter \neq Consensus for Same

VII. Sample Agenda, Sample Minutes, Sample Issues:
Available through One-Drive

- A. For School-Based PPCs and SPPCs
- B. For District PPCs and SPPCs

Critical Features in the Creation of Articles of Agreement for an Upstart PPC

Once a school has determined the membership and leadership of Partnership and Performance Council, one of its first steps as a governing body is to come to agreement about conditions of and details about its meetings, membership terms, purpose, and functions. To this end, please consider these suggestions:

1. Contact the CCPS Human Resources (HR) Office to request sample agreements from PPCs that have already forged their Articles of Agreement. Generally, the best contact for securing these is the confidential secretary to the HR Director.
2. PPC leaders should review these samples and supply the best two or three to members of your council.
3. At the first meeting of the PPC, council members should discuss the best features of these sample agreements, accepting or rejecting the versions in the other schools' charters (articles of agreement).
4. As the group shapes its document, it can discuss and draft at the meeting or can discuss what it wants in the document and shape it away from the meeting for consideration by the group at the next regular meeting.
5. Below are some structural considerations for shaping the document:
 - A. Title of Document
 - B. Name of School
 - C. Date of Document
 - D. Names and Titles of Those Who Craft the Document
 - E. Purpose of the Document
 - F. Membership Description
 - G. Membership Rotation (Terms, Resignations, Nominations, etc.)

- H. Meeting Frequency
- I. Meeting Times
- J. Duration of Meetings
- K. Site of the Meeting
- L. Agenda Generation
- M. Publishing of Agenda: Who and How / Paper and Electronic?
- N. Transparency in Call for Items for Agenda
- O. Keeping of Minutes
- P. Approval of Minutes
- Q. Secretarial Role: Who / How
- R. Publication / Distribution of Minutes
- S. Visitors to Meeting
- T. Old Business
- U. New Business
- V. Modifications and Approval of Agenda Items
- W. Necessary Research Needed for Next Meeting
- X. Necessary Expert Voices Needed to Consider / Settle an Item
- Y. Invitations to Others / Joint Meetings of CFEA and CCSPA PPCs
- Z. Actions Taken on Agenda Items
- AA. Long Term Goals / Short Term Goals
- BB. Other Topics as the Group May Find
- CC. Social Event Planning
- DD. Food and Drink at PPC Meetings
- EE. OTHER: _____
- FF. OTHER: _____

For sake of estimate, the Articles of Agreement may be contained in as few as two or three pages, dependent upon the will of the group in describing the aspects for inclusion, above. Association leaders and human resources personnel can be assistive (and willing to appear) if the group finds wisdom or advantage in having such reps present in the early meeting schedule of the upstart / reforming PPC.

As a gentle reminder: any topics explicitly described in the collective bargaining agreements are considered previously settled and are not topics of consideration for a Partnership and Performance Council. Typically, topics dealing with job descriptions, wages, hours, or other aspects of employment fall into this category.

THE HOW AND WHY OF PARTNERSHIP

Working in partnership creates a new and improved labor-management culture. A new culture of successful partnership characterized by:

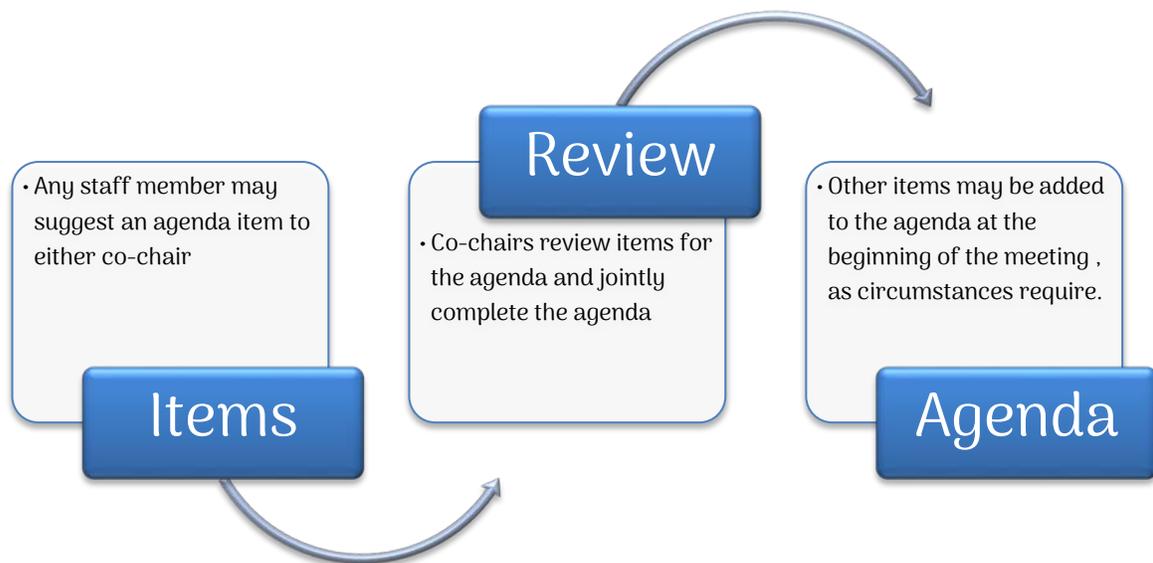
- An environment that values and respects all employees.
- Joint decision-making and agreement reached through consensus. Cooperation, although some disagreement should be expected.
- Patience for and commitment to partnership for the long haul. Problems identified and solved jointly.
- A willingness to share power.
- Respect and trust for all and a commitment to work on this goal. Open and candid sharing of information.

The essential structural requirement for successful partnership and collaboration is the creation of a School-Based Partnership Committee. A single definition or model for Partnership and Performance Councils and Committees (PPC'S) does not exist. Different situations and shared interests will influence what each partnership looks like. But one essential characteristic exists in all: a changed labor-management relationship. As the labor-management relationship matures, consensual problem-solving becomes the

preferred method of resolving workplace issues. Only through changed behavior and attitudes can partnership thrive. Success occurs at the speed of trust.

The PPC'S must include credible representatives from labor and management who understand the issues and can make decisions. Important is to keep in mind that the size of a group can greatly affect the quality of interaction. Each council should not exceed eight or ten members. Participation on the PPC is voluntary, and representatives may be rotated or serve for a predetermined length of time.

PPCs should meet on a regular schedule. In any revisioning phase, a council may meet as frequently as an hour each week. Later, meetings may occur on a monthly basis. During a typical meeting, PPC members decide which problem to work on, gather the information needed to resolve the problem, and recommend a solution. The PPC makes an effort to inform stakeholders, effectively, of the issues and involves them in the solution.



IBPS STEP 1: Define the Problem

Discuss the problem and develop a question that:

- (a) Includes the subject (what the problem is about)
 - Scheduling
 - Customer service
 - Dress requirements
 - Overtime costs
- (b) Identifies the issue regarding the subject
 - *Overlap* in scheduling
 - *Improving* customer service
 - *More relaxed* dress requirement
 - *Controlling* overtime
- (c) Begins
 - “How might we . . . ?”
 - “How can we . . . ?”
 - “What shall we . . . ?”
- (d) Cannot be answered “yes” or “no”
- (e) Contains no solutions (Step 3)
- (f) Contains no accusations or inflammatory wording

Examples

- How might we avoid overlap in the schedule?
 - How might we improve customer service?
 - How might we relax the dress code?
 - How might we control overtime costs?
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- Reach consensus on the form, wording and substance of the question.
The six-step checklist for framing an issue is presented in example form.

Example #1 issue statement: “Employees are claiming that overtime is being improperly assigned based on favoritism and are demanding that this practice be stopped immediately and that supervisors be instructed on proper procedures.”

1. Separate solutions from the problem

Result: “Employees are claiming that overtime is being improperly assigned based on favoritism.”

2. Separate the people from the problem

Result: “Overtime is being improperly assigned based on favoritism.”

3. Present the issue as a question

Result: “Can management stop favoritism in the assignment of overtime?”

4. Frame as a joint problem

Result: “Can we stop favoritism in the assignment of overtime?”

5. Open to multiple solutions

Result: “What can we do to stop favoritism in the assignment of overtime?”

6. Frame objectively

Result: “What can we do to improve procedures in the assignment of overtime?”

HOW TO DEVELOP OPTIONS

1. Select method by consensus, such as
 - Brainstorming
 - Best Practices
 - Expert Panel
 - Straw Design

2. Use first three methods to generate multiple ideas or possible solutions.

3. For complex issues, when time is short, or when facilitation is not available, consider Straw Design, the fourth method.

IBPS STEP 3: Develop Options

Tool: Brainstorming

Definition	Brainstorming is a technique used to generate ideas. Brainstorming involves everyone, permits new and unusual ideas to surface, produces many choices, encourages synergy, and discourages evaluation. All team members contribute ideas and a recorder captures each idea as suggested.
When to use it	Use brainstorming to create options.
Benefits	Brainstorming is valuable because it... <ul style="list-style-type: none">• Involves everyone in the problem-solving process.• Develops creative and innovative ideas.• Generates options which satisfy interests, including separate ones.• Enlarges the pool of options.
Tips for effective tool use	<ul style="list-style-type: none">• Be freewheeling• Imagine, wonder, dream, share mental images, synonyms, plays on words, free associations, farfetched ideas• Take risks• Don't censor your own ideas• Build on others' ideas• Listen, combine, adapt, expand, hitchhike, piggyback• Aim for quantity,• Don't worry about similarities or duplicates or fine tuning an idea• Record every idea• Work through a pause• Escape the boundaries of logical thinking and old 'mind sets.'

What to Avoid	<p>Do not critique, evaluate, ridicule, or otherwise comment negatively on any idea during brainstorming. A team member who hears immediate criticism may feel inhibited and withdraw from the process. Though the first idea that comes to mind may not be the best, criticism interrupts the flow of developing ideas.</p>
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IBPS STEP 3: Develop Options

Tool: Best Practice

Definition	Proven options that have been implemented and evaluated by other organizations.
When to use it:	<ul style="list-style-type: none">• The problem to be solved is one common in the industry or profession.• Individual group members have knowledge of other practices.• Potential solutions are easily attainable from source documents, magazines, journal articles or the internet.
Benefit	Saves time and may help in avoiding costly errors.
Tips for effective tool use	<p>Assign individuals to collect solutions that have been implemented at other locations, both internal and external, dealing with the same or similar problem before the group.</p> <p>Interview the users to determine the effectiveness of and satisfaction with their practice, and to solicit other instructive comments.</p>
What to Avoid	Adopting the practice without proving its effectiveness. Only receiving input from one party (labor / management) as to their best practice and results.

IBPS STEP 3: Develop Options

Tool: Expert Panel

Definition	A tool that generates a listing of potential solutions from individuals or organizations who are known experts in the problem area, or from organizations who specialize in providing solutions to the problem area of concern.
When to use it	Obtaining subject matter expertise can be easily obtained from known persons.
Benefits	Saves time to receive valuable and proven information from a credible source.
Tips for effective tool use	Arrange visits to your organization by individuals who are subject matter experts and conduct an interview. Have organizations send representatives to your meetings to market or present their proposed solution.
What to Avoid	Mistaking a vested interest (salesperson) as an expert.

IBPS STEP 3: Develop Options

Tool: Straw Design

Definition	<p>A tool that develops and considers a comprehensive draft submission which encompasses all component parts of an issue. To reach a consensus agreement on the final draft.</p>
When to use it	<p>Straw design is preferred as a tool when any of the following conditions are present; time is limited, the problem to be solved is complex, the skills in applying Interest-Based Problem Solving within the group are relatively unequal, or competent facilitation is not present.</p>
Benefits	<p>Saves time, rely on the highest skills in the group, provide focus, and keep the group on task.</p>
Tips for effective tool use	<p>A joint work group is appointed to serve as authors of a straw design, which addresses common interests and solves the problem under consideration. The submission is not a recommendation, but an initial draft presented to the group for review and feedback. The authors present the draft and answer questions for clarification only. The draft is made of straw and constructive criticism is welcome. During the feedback phase the authors may not defend the draft, but simply record the group's concerns and suggestions to be used in re-working the draft.</p> <p>Following the feedback period, the authors begin work on a re-draft, which incorporates the previously recorded concerns and suggestions. The revised draft is presented to the group as a 'wood' design, meaning the design is in approximate final form, and</p>

What to Avoid	<p>concerns and suggestions at this point should be substantially fewer than in the straw design round. The feedback –revision phase is repeated and the authors submit a final draft termed the ‘brick’ design for a consensus decision.</p> <p>Using the tool to exclude ideas of others. Allowing authors to defend a design or argue for its adoption.</p>
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IBPS STEP 4: Select a Solution

Tool: Sticker Ranking

Definition	A tool used to reduce a large number of options to a manageable number.
When to Use It	When there are a large number of options.
Benefits	Saves time; focuses attention on the options most preferred by the group; eliminates undesirable options quickly.
Tips for effective tool use	Post the listing of previously brainstormed options on the wall and assign a number to each. Distribute an equal number of brightly colored stickers to each member. Each member is to distribute his/her stickers on the flip charts next to the options in such a way as to indicate his/her preferences. Each sticker should be placed on a different option. Group members then decide by consensus how many options that have received stickers to retain; with the options receiving a greater number of stickers preferred over those with a lesser number. The goal is to reduce the list to 3 – 7 options.
What to Avoid	Using the tool when the number of options is already manageable. Identifying people with sticker choices.

IBPS STEP 4: Select a Solution

Tool: Standards

Definition	A listing of criteria or “tests” which are used to evaluate listed options.
When to use it	When the listing of options is relatively short and manageable.
Benefits	Provides a basis upon which to compare options without having to resort to adversarial tactics or traditional methods of offer-counter offer-compromise.
Tips for effective tool use	Reach consensus on a list of 4-8 standards. Examples are attached. Compare each option to all of the standards and rate the standard on a pass-fail basis. Pass requires a consensus agreement; fail is the default. After all the options have been evaluated, total the “pass” scores for each option. Reach a consensus agreement on selecting the option with the highest “pass” total. If high options are tied, reach a consensus agreement on the option that satisfies the most common and separate interests.
What to Avoid	Getting bogged down over definitions of standards. Not accepting reasonable standards. Over reliance on one subjective standard to fail all options; such as “sellable”.

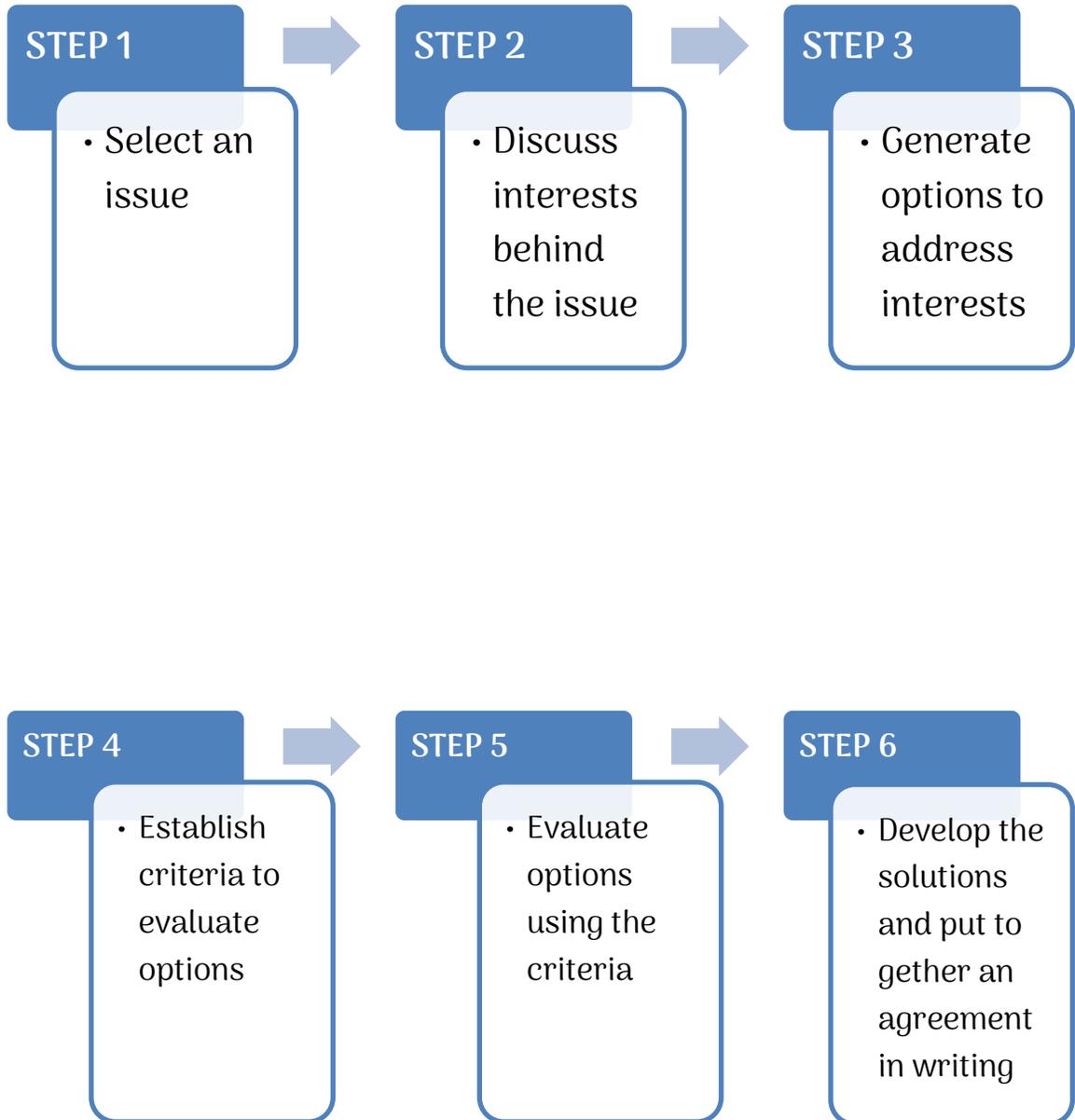
SAMPLE DEFINITIONS OF STANDARDS

AFFORDABLE	to be able to meet the expense of; to be able to do without serious consequence or cost; cost effective.
CONSISTENT	constantly adhering to the same principles; or if involving policies or procedures, the absence of lax enforcement or varying application.
CREDIBLE	capable of being believed, worthy of confidence.
DEFENDABLE	capable of being supported or validated by reason and argument.
DEFERRABLE	capable of being postponed for action at a later time; capable of being defined as a separate issue.
EFFECTIVE	adequate to accomplish a purpose or solve a problem.
EFFICIENT	performing in the least wasteful manner; satisfactory and economical to use.
EQUITABLE	just and right, fair, reasonable.
ETHICAL	moral, upright, honest, righteous, honorable.
EVEN-HANDED	impartial, without discrimination or disparate treatment.
FAIR	free from bias, dishonesty, or injustice.
FEASIBLE	capable of being done or accomplished.
FLEXIBLE	susceptible of modification, easily changed.
IMPARTIAL	unbiased, fair, just.
LEGAL	permitted by law or contract.
PRACTICAL	sensible, efficient and workable; as opposed to theoretical.
RATIFIABLE	subject to approval, confirmation, or agreement.
RELEVANT	bearing upon or related to an interest.
RELIABLE	trustworthy, dependable, accurate, honest.
RESOLVABLE	that which falls within the legitimate authority of the group or committee.
SELLABLE	to win acceptance, approval or adoption.
SIMPLE	easy to understand, deal with, use; not complicated.

TIMELY occurring at a suitable time, not delaying.

WORKABLE practicable, feasible, or practical.

IBPS Summary



STEP 1: SELECT AN ISSUE.

Clarify and understand the scope of the issue(s).

STEP 2: DISCUSS INTERESTS BEHIND THE ISSUE.

Seek clarification of expressed interests as needed. Identify interests from any items stated as positions. Brainstorm additional issues. Identify mutual and separate issues.

STEP 3: GENERATE OPTIONS TO ADDRESS INTERESTS.

Options should be offered that would satisfy the needs, or most of the needs of one party or the other. Try to generate at least two options that will satisfy each interest.

STEP 4: ESTABLISH CRITERIA TO EVALUATE OPTIONS.

Establish criteria that meet both parties' needs. Is rectifiable, flexible, practical or legal.

STEP 5: EVALUATE OPTIONS USING THE CRITERIA.

Evaluate options against the criteria and determine which can be adopted and developed as solutions, and which can be disposed of.

STEP 6: DEVELOP THE SOLUTIONS AND PUT AGREEMENT IN WRITING.

Review the meaning of the options that must be drafted as solutions and the interests they are designed to address. Focus on documenting the consensus adopted options in acceptable language. Categorize the options and begin writing the agreement.

REVIEW/REVISION OF Instructional Personnel Performance Appraisal Plan (IPPAP)

A committee of representatives from the CFEA and district administration began reviewing and revising the IPPAP in the spring of 2007. This activity will continue.

The new Professional Accountability for Charlotte Educators (PACE) was piloted in Sallie Jones Elementary School for 2008-09.

The Evaluation Committee will evaluate information and make revisions to be recommended through the collaborative bargaining process.

Suggested Annual Guidelines for PPC Tasks

Previous April/May

Review calendar of meeting dates/time for following year

Beginning of the School: July/August

Co-Chairs meet at least two weeks prior to first PPC meeting of the year TASK or PURPOSE?

Co-Chairs contact all committee members to verify membership status on PPC

Co-Chairs send request for agenda items from all staff members (2 weeks prior to meeting) WHAT MEETING?

August

School Improvement Plan

Parent and Family Engagement Plan

Scheduling of all Instructional Support staff (e.g. Paraprofessional)

Timely and transparent communication about scheduling of all Instructional staff (e.g. Teacher)

Recommendations for distribution of A-Plus monies (should the school receive such funds)

Starting and Ending Times for Staff

Minimum number of grades and grading policy (instructional only)

Meeting-free day

School-identified Marzano elements (instructional only)

Professional Development opportunities for the year

September- March

Regular meaningful review of submitted issues

April/May

Drafts and/or Considerations of scheduling of all Instructional Support staff (e.g. Paraprofessional) for the following school year

Drafts and/or Considerations of scheduling of all Instructional staff (e.g. Teacher) for the following school year

Pre-School Week In-Service Schedule for follow school year

