

# A GUIDE TO SCHOOL EMPLOYEE WELL-BEING THROUGH COLLABORATION

How school employees, their unions, and school administrators at all levels can create a better place to learn, work and thrive

## PART I: COLLABORATING FOR WELL-BEING



## PART I: COLLABORATING FOR WELL-BEING

### SUCCESS STORY FROM SAN LEANDRO USD

The 2015-2016 school year brought welcome changes to the San Leandro (California) Unified School District. **Every staff break room in the district had been de-cluttered, repainted and refreshed.** Voluntary wellness champions at each school promoted healthy activities for staff and students, including—for staff—**free flu shots, stress management classes, and physical activity breaks** during meetings. A joint Labor Management Committee provided direction for employee wellness programs across the district.

All of this and more had been championed by the San Leandro Teachers Association, and the initial structure was agreed upon in collective bargaining. The effort has **improved wellness, morale, and the working environment** at schools across the district. Both parties agree that the collaborative approach to well-being enabled the program to succeed where previous attempts had failed.

Kaiser Permanente, as the district health plan, supported the success in San Leandro USD in a number of ways. Wellness experts provided the following to get the program off the ground:

- » Program and labor management support
- » Classes
- » Program tips
- » Grants

The wellness effort in San Leandro united labor and management in a shared goal, serving as the first step toward long-term culture change to promote employee health.

For the full story, visit the KP Thriving Schools [website](#).

## ADVOCATING FOR HEALTHY SCHOOLS, STUDENTS, AND STAFF

Based on the success of dozens of districts across the country, this guide provides a roadmap for unions and administration stakeholders at all levels to work together to build an employee well-being initiative in a school or district setting. The goals are to give you:

- » An increased understanding of how to build labor management collaboration for school employee well-being
- » Pathways and resources to build and launch a collaborative school employee well-being initiative
- » Knowledge about where to find additional resources, including detailed guides, templates and examples, case studies, and other information about districts and unions engaging in this work

The guide focuses on collaborating for employee well-being, which can take place outside of bargained agreements and other negotiations. It was prepared by Kaiser Permanente, with input from researchers and union and administration association members. Twenty years ago Kaiser Permanente entered into a partnership agreement with the [Coalition of Kaiser Permanente Unions](#). Over this time, we've found that the most effective way to promote employee well-being is for labor and management to work together. By jointly addressing the well-being of its employees, school districts create a workplace environment that fosters the best education and care for all students. To learn more about the [Office of Labor Management Partnership \(LMP\)](#), see "About the Partnership" ([page 15](#)).

**PART I** of this guide describes a labor management approach to building a school employee well-being program.

**PART II** lays out a step-by-step process to build the collaborative elements of the program.

## DEFINING "SCHOOL EMPLOYEE WELL-BEING"

Traditionally, conversations about employee health have been about "wellness" and are now moving to "well-being," a term inclusive of more than just physical and mental health. While there are many definitions of well-being, at its core, it is inclusive of mind and body health and satisfaction in other aspects of life. [The Energy Project](#), the [Centers for Disease Control & Prevention](#), and [Willis Towers Watson](#) all reference some type of well-being model.

## STRESS IN SCHOOLS

Supporting the social and emotional well-being of school teachers and staff is critical for creating a positive school climate and retaining quality educators.

- » Nearly half of teachers nationally reported they felt under great stress several days a week.<sup>1</sup>
- » 46% of educators leave the profession within 5 years.<sup>1</sup>
- » Students come to school with a variety of stressors and needs stemming from family and community issues. Staff and teachers aren't always equipped to meet those needs.

Additional challenges include job demands (such as standardized testing) and limited job control (or opportunities for decision-making).<sup>2</sup>

A variety of approaches, programs and policies are beginning to emerge to support the social and emotional well-being of school staff:

- » Peer and group support teams
- » Mindfulness practices
- » Flexible sick and leave policies

According to the results of a Gallup study<sup>1</sup> involving people from 150 countries, the “[five essential elements of well-being](#)” are:

- » **CAREER WELL-BEING:** how you occupy your time or simply liking what you do every day
- » **SOCIAL WELL-BEING:** having strong relationships and love in your life
- » **FINANCIAL WELL-BEING:** effectively managing your economic life
- » **PHYSICAL WELL-BEING:** having good health and enough energy to get things done on a daily basis
- » **COMMUNITY WELL-BEING:** the sense of engagement you have with the area where you live

The [Consumer Financial Protection Bureau \(CFPB\)](#) defines financial well-being as having financial security and financial freedom of choice, in the present and in the future.

In school environments, creating a culture of well-being for school staff requires dynamic programs and activities, thoughtful policies, and environmental change. A labor management initiative can be one of the most effective methods to establish a successful and sustainable program.

## WHY DOES SCHOOL EMPLOYEE WELL-BEING MATTER?

Healthy employees are vital for a successful school because they provide the continuity and stability essential for educational excellence:<sup>4</sup>

- » A healthy workplace leads to employees who are more satisfied with their jobs, get better results, and model healthy behaviors.
- » Healthy school employees are absent fewer days and are more likely to stay in their positions.
- » Savings, from lower substitute teacher costs and onboarding new teachers, can be reinvested into the school to promote health, well-being, and education.

School  
employee  
well-being  
efforts



- » Improved job satisfaction and morale
- » Reduced disability costs
- » Staff as healthy role models for students
- » Increased staff attendance
- » Lower job stress



Increased  
student  
educational  
and district  
success



# What is a Labor Management Collaboration for Well-being?

## **PARTNERING FOR WELL-BEING VS. BROADER DISTRICT PARTNERSHIPS**

Labor and management already collaborate in a number of school districts and work on several broad initiatives that include: curriculum planning, state education requirements, student well-being, student achievement, and improvements to the learning and workplace environment. Districts that are developing or have already established a partnership with a wider agenda can effectively incorporate an employee well-being component into those efforts.

**Partnering on well-being has sometimes opened doors for deeper, more complex partnerships on larger district goals.** A labor management initiative on well-being can also stand alone. If you are interested in learning more about initiatives that involve factors beyond employee well-being, visit the [California Labor Management Initiative Resource page](#).

## **THE BENEFITS OF A LABOR MANAGEMENT COLLABORATION FOR WELL-BEING**

Labor management collaboration is a strategy for innovation and performance. Key components of a labor management collaboration includes active leadership between the district, schools, and union stakeholders; strategic communication tactics; inclusion of employee voice; and school employee champions

### **Well-being programs with a strong labor management approach tend to:**

- » Develop more effective and sustainable plans and strategies
- » Be better received and accepted by school employees—and are therefore more likely to make an impact

### **Well-being initiatives that lack collaboration are likely to hit roadblocks that will interfere with successful launch or implementation, such as:**

- » Less insight into employee interests and needs
- » Higher resistance and rejection from employees
- » Lower trust in well-being goals
- » Lower rates of participation

### **UNION PARTICIPATION PROVIDES:**

- » Trusted negotiators & communicators
- » Insight into employee perceptions
- » Sustainable structures: decision making, communications, leadership development, employee involvement



### **MANAGEMENT PARTICIPATION PROVIDES:**

- » Access to district communication channels
- » Access to district decision makers
- » Influence with school level leadership
- » Relationships with external partners



### **SUCCESS AND SUSTAINABILITY:**

The design, implementation, and evaluation of a successful school employee well-being initiative, with buy-in from all parties and continuous improvement based on employee feedback.

## HOW TO ADDRESS OBSTACLES AND CONCERNS:

Periodically revisit your interests and recognize that health and well-being are in the best interest of all partners.

Incorporate employee feedback into your program planning and decision-making through meetings and surveys, to provide an alternative to a traditional labor management dynamic.

Make use of the skills, resources and relationships already in place in your district, unions, and community. Also, consult with your health plan provider(s).

Persevere: commit to promoting health and well-being for students, families, and employees by maintaining relationships through difficult times; sometimes this may involve waiting to reconvene until other central issues are resolved.

## INTEREST-BASED RESOURCES

For more information on interest-based problem solving, refer to the following resources:

- » [“Interest Based Problem Solving: A Step by Step Guide”](#) from the [Impartnership.org](#)
- » *Getting to Yes* by William Ury
- » *Win-Win Labor-Management Collaboration in Education: Breakthrough Practices to Benefit Students, Teachers, and Administrators* by Linda Kaboolian

## IDENTIFYING INTERESTS AND VALUES

As you begin to build your relationship, you will notice that while unions and school administration each have distinct and at times conflicting interests, their positions are often aligned when it comes to well-being.<sup>5</sup> Identifying both parties’ common and respective interests for well-being can create a picture of what a successful school employee well-being initiative will look like.

The “A Snapshot of Well-being Interests and Values” (see page 7) can help you articulate common, overlapping and distinct interests for each partner. The following interests are especially important to note because they can make or break a well-being initiative:

- » Health information is always private and protected, and reported only in aggregate to the employer
- » Well-being initiatives are not punitive or shaming to employees
- » Well-being opportunities are fairly distributed among all represented workers
- » Resources are sustainable and cost-effective

In addition to these interests and values, you are likely to have others specific to your particular school district. You can use the discussion guide, found in Part II, in your initial partnership meetings to identify each party’s interests and values and find common ground.

## ACKNOWLEDGING COLLABORATIVE CHALLENGES

Labor management initiatives for school employee well-being are proven to be effective. However, tense past negotiations, district budgets, school climate, and other factors can cause apprehension or resistance to working together.<sup>6</sup> Obstacles to collaboration include:

- » Management bringing the unions into the process late in the game to approve pre-developed plans
- » Unions and/or management acting as yes/no gatekeepers rather than full partners who support the well-being of employees
- » Disagreements over resource allocation, shared interests, and program goals and processes
- » Disruptions due to bargaining and negotiations on core labor management issues

Acknowledging potential challenges at the outset and committing to work through as many as possible will go a long way toward effective collaboration.

# LABOR MANAGEMENT PARTNERSHIP BETWEEN KAISER PERMANENTE AND THE COALITION OF KAISER PERMANENTE UNIONS

## ABOUT THE PARTNERSHIP



In 1997 Kaiser Permanente and the Coalition of Kaiser Permanente Unions created the Labor Management Partnership (LMP) as a strategy for innovation and performance. It is the largest and most comprehensive labor management partnership in the country. To be a leader in the health care industry, Kaiser Permanente understands that it must have a healthy workforce. From this shared interest in employee well-being, management and unions at Kaiser Permanente partnered to create a workforce health initiative for 115,000 union-represented workers and managers. The initiative builds a community of support throughout Kaiser Permanente so that our workers become role models for one another, for the members and patients, and for the communities we serve.<sup>7</sup>

### ACKNOWLEDGEMENTS

This guide was developed in consultation with several union, management, and research stakeholders. We thank the following organizations and individuals for their assistance and comments that greatly enhanced this guide:

#### Darryl Alexander

Director of Health, Safety and Well-being, American Federation of Teachers (AFT)

#### Inge Aldersebaes

Associate Director  
Oregon Education Association (OEA)  
Choice Trust

#### Jennifer Ballerini

President of the Classified Employees Union (AFSCME)  
Elk Grove USD

#### Kathleen Buzad

Center for Union Management Partnerships  
Director, AFT

#### Ken Futernick

President,  
Futernick Consulting LLC

#### Dick Gale

CTA Institute for Teaching Manager, California Teachers Association (CTA)

#### Gregg Gascon

President, Social Science Research & Evaluation, LLC

#### Carrie Hargis

Director of Fiscal Services,  
Elk Grove USD

#### Ed Honowitz

Project Director, California Labor Management Initiative

#### Debb Jachens

Member Benefits, California School Employees Association (CSEA)

#### Kayla Jackson

Project Director, American Association of School Administrators (AASA)

#### Carol Malone

Senior Health Care Policy Specialist National Education Association (NEA)

#### Mary McDonald

Senior Director, Consortium for Educational Change

#### Rosanna Mucetti

Deputy Superintendent Educational Services, San Leandro USD

#### Aaron Price

President  
Glen Price Group

#### Kathy Rallings

Health and Benefits Specialist, CTA

#### Alva Rivera

Regional UniServ Staff  
Negotiations and Organizational Development Department, CTA

#### Wes Smith

Executive Director, Association of California School Administrators (ACSA)

#### Joel Solomon

Senior Policy Analyst, National Education Association (NEA)

#### Anita Waldron

Vice President of San Leandro Teachers Association,  
San Leandro USD

#### J.D. Watson

Teacher, Elk Grove Education Association, Elk Grove USD

#### Emily Galpern Consulting

### FOOTNOTES

- 1 Kopkowski, Cynthia. Why They Leave. NEA Today (2008, April 5). Retrieved from <http://www.nea.org/home/12630.htm>
- 2 Robert Wood Johnson Foundation. (2016, September). Teacher Stress and Health. Retrieved from [http://www.rwjf.org/content/dam/farm/reports/issue\\_briefs/2016/rwjf430428](http://www.rwjf.org/content/dam/farm/reports/issue_briefs/2016/rwjf430428)
- 3 Robert Wood Johnson Foundation. (2016, September). Teacher Stress and Health. Retrieved from [http://www.rwjf.org/content/dam/farm/reports/issue\\_briefs/2016/rwjf430428](http://www.rwjf.org/content/dam/farm/reports/issue_briefs/2016/rwjf430428)
- 4 Rubinstein, S. (2015, May 9). *Labor-Management Collaboration: Impact on Student Achievement*. Retrieved from <http://cdefoundation.org/lmi/symp/files/CLMI%20Workshop%20Pres%205-15rv.pptx>
- 5 Rubinstein, S.A. (2014). Strengthening Partnerships: How Communication and Collaboration Contribute to School Improvement. *American Educator*, 37(4), 22-28. Retrieved from <https://www.aft.org/sites/default/files/periodicals/Rubinstein.pdf>
- 6 Futernick, K. (2016). Obstacles to Collaboration. *In The Courage to Collaborate: The Case for Labor-management Partnerships in Education* (pp.71-89). Cambridge, MA: Harvard Education.
- 7 Total Health Incentive Plan. (2012). Retrieved from: [https://epf.kp.org/wps/portal/hr/kpme/healthyworkforce/prevention/TotalHealthIncentivePlan?kp\\_shortcut\\_referrer=kp.org/totalhealthincentive](https://epf.kp.org/wps/portal/hr/kpme/healthyworkforce/prevention/TotalHealthIncentivePlan?kp_shortcut_referrer=kp.org/totalhealthincentive)