

The Full Capacity Locals Project: *A Report for Education Minnesota*

Mobius, Inc.; Organization Development Consultants

April 2002

Executive Summary

A state-wide dialogue designed to develop a shared strategy to respond to historic challenges to education in Minnesota was undertaken at the invitation of the leaders of Education Minnesota with the support of Mobius, Inc. consultants.¹ Union staff and leaders at all levels participated. The objectives (listed below) were accomplished through a large-scale, state-wide, dialogue process that was new to most participants; they were more familiar and comfortable with the problem-solving orientation of the organization, and of school systems.² Mobius, Inc. consultants facilitated dialogues to develop (1) mutual understanding among the diverse viewpoints within the union, (2) a shared vision for the future, and (3) alignment on priorities and next steps. Recommended next steps to sustain these results include (a) training and coaching of field staff to develop the skills and leadership required to create partnerships with local leaders to develop *full capacity locals*, (b) facilitation of an inquiry process to guide local and state-wide planning to identify and build on existing strengths by involving all stakeholders, and (c) system-wide training and coaching support to enhance the capacity for partnership and collaboration at all levels within the union.

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Purpose and Objectives

The immediate challenge was articulated in our first conversations with the President and Executive Director of Education Minnesota: find a way to focus the attention of union leaders at all levels to formulate **an effective, collaborative strategy for responding to the dramatic, historic changes impacting the public education system and the union.** Nearly 40 % of Minnesota's teachers, including a large percentage of veteran leaders, will be retiring in the next four to five years, as will half of the veteran union field staff who support the leadership in union locals. This impending loss of leadership capacity requires an effective, timely response, or valuable human resources now available will be lost. This challenge coincides with a shrinking economy, making the contrast of limited resources and unlimited demands a stark one. Current challenges follow on the heels of a successful but demanding multi-year effort to merge the two major teacher organizations to create Education Minnesota.

¹ See Appendix D for information on Mobius, Inc.

² See Appendix A for a description of dialogue events and outcomes

A key objective of this project was to **agree to priorities that leverage always limited human and financial resources** to ensure the long-term vitality of the union as a key stakeholder in Minnesota's educational system. No easy answers were expected but union leadership and Mobius consultants saw an opportunity to draw on the collective wisdom of teacher-leaders and staff to find a creative and effective response to the challenges.

The following objectives were formulated for evaluation by members of a project leadership team selected to be a microcosm of the diverse stakeholder viewpoints within the union (see appendix A).

Participating leaders at all levels within the union will develop:

- Understanding of the state-wide leadership challenge and opportunity.
- A shared vision of collaborative leadership for education in local districts.
- Agreement to expectations for relationships between field staff and local leaders.
- Commitment to strategic priorities that leverage the finite resources available.
- An organizational culture that supports the development of *full capacity locals*.

Mobius, Inc., along with the leadership team, committed to accomplish these results between May 2001 and February 2002, and to present the findings at the annual gathering of local presidents for the President's Recognition Weekend.

The Process

A statewide dialogue among union stakeholders, including leaders from all of the 410 locals, was proposed by Mobius, Inc. as the most effective and efficient way to accomplish the project objectives. The complexity of conflicting school schedules and job responsibilities made any large-scale, multi-day dialogue unrealistic. The alternative solution was to hold an initial, two-day dialogue among a mixed stakeholder group which was chosen to be a microcosm of the whole system. The results of this initial dialogue would be expanded through a series of meetings, over an eight month period, to include as many leaders from throughout the state as possible, along with all state-level staff, including managers. Finally, the Governing Board would consider the results, including any proposals for action, which emerged as shared commitments.

The project objectives and design emerged from a half-day dialogue with the project leadership team; members included the state President, the Executive Director, the head of the employee union, and several field staff, one of whom volunteered to be the inside facilitator to work with Mobius, Inc. consultants. Without the commitment of these leaders, and their partnership with Mobius, Inc. consultants throughout this project, the objectives could not have been accomplished.

A key result of this first meeting was agreement by the President and Executive Director to formulate some *indicators of a full capacity local*.³ This idea emerged from an expressed desire for the state-wide dialogue to result in a shared vision of "healthy"

³ See Appendix B to review the indicators of full capacity locals

locals. This “wellness” model would answer the question, “What would healthy, *full capacity locals* look like?” If agreement to such a model could be developed, it could guide the setting of priorities for allocating scarce resources for the greatest short-run and long-term impact. The desire was to think beyond solving current problems to a strategy to which all stakeholders would commit.

In the first gathering of the multi-stakeholder group in, July 2001, participants responded to the initial sketch of what a *full capacity local* might look like. As the participants in the two-day dialogue worked to generate proposals, they sat in a large circle, or worked in small groups – sometimes mixed to include all stakeholder viewpoints and sometimes in single stakeholder groups. They shared their differing viewpoints and listened to add other viewpoints to their own.

Four key results emerged from this dialogue that proved to be themes in other, subsequent dialogues as well.

First, all believed that the diversity of locals had to be respected, and most were skeptical of what seemed, at first, to be a one-size-fits-all model.

Second, they reported, at the end of the conference, that they saw far more commonality than they expected in the challenges faced by leaders of locals in very differing situations.

Third, they thought that the list of indicators of full capacity, developed from the initial sketch, did a good job of identifying elements required for full capacity for locals in any situation. However, they wanted to avoid any impression that they wished to impose their ideas on leaders or staff not in the room. They wanted anyone who considered their work to recognize the resulting image of a *full capacity local* was not written in stone.

A fourth result was a decision by the Board, in response to a suggestion from this group, to establish a task force to consider creative approaches to the demands on field staff time to advocate for individual member rights.⁴ Everyone could see that the critical partnership between field staff and local leaders would be severely limited if the current demand on field staff continued. Something would need to change for field staff to have time to support the development of the capacity of the locals: this proved to be an important decision.

The first opportunity for local presidents to evaluate the indicators of *full capacity locals* was at the Summer Seminar, two weeks later. Their response was very affirming of the indicators as a useful guide for assessing local capacity and setting priorities, especially for new leaders. They agreed that this assessment process would be best conducted as a dialogue involving leaders of each local and their field staff.

⁴ See Appendix D

Challenges emerged, in subsequent events, as new participants considered the results-to-date and joined in the dialogue process. One issue that surfaced early was the perception that the circumstances of release-time presidents set them apart from other leaders; most local presidents do their work in addition to working a full time teaching job. In a November meeting with release time presidents the exclusive focus of the dialogue on *full capacity locals* was challenged; they suggested that attention be given to what “full capacity” would mean at the state level of the union. The challenge was accepted by the President and Executive Director. At the February meeting of the expanded multi-stakeholder dialogue, they proposed state-level initiatives consistent with the shared priorities for locals that seemed to be emerging from the dialogue. These initiatives were well received.

Another issue emerged as field staff and program staff considered the implications of the *full capacity local* model for their jobs: veteran field staff brought different approaches to their work, and the full capacity local model challenged some of their approaches. A description of the roles and priorities for field staff was formulated from surveys of local presidents and staff involved in the dialogues.⁵ It became clear that leadership at all levels of the union needed to become facilitative and collaborative. Local leaders needed to develop local leadership teams, not do all the work themselves. Field staff would need to develop and/or enhance their skills as facilitators and coaches, rather than trying to be the experts and problem-solvers for local problems as has been expected in some circumstances.

In February 2002, all 35 members of the original multi-stakeholder team were invited to meet again, this time with members of the Council of Local Presidents, to consider the results of the months-long dialogue process. This meeting followed a report from the task force, formed at their first meeting in July; the report recommended alternatives for use of staff time for individual member rights advocacy. In addition, the President and Executive Director formulated three state-level initiatives to support development of *full capacity locals* to be considered in the dialogue. The expanded, multi-stakeholder group ended, after an evening and a day of dialogue, by endorsing for consideration by the Local Presidents (1) the *Indicators of Full Capacity Locals*, (2) The three 2002 initiatives offered by the President and Executive Director, and the (3) *Field Staff Roles and Priorities* that had been reviewed by the full staff in December.

It was clear from the final, half-day dialogue, involving all local presidents at the Presidents Recognition Weekend, that the dialogue process had discovered common ground. After careful consideration, the presidents indicated their alignment with the vision of *full capacity locals* and the initiatives and the general agreement of the field staff priorities proposed by the expanded multi-stakeholder group.

The final step was to report the results of the dialogue to the union Governing Board. A concern throughout the project was to find a way for the differing interests at the state and local levels to be recognized and respected, without a top-down imposition of priorities by the Governing Board, the official decision-making authority. Fortunately

⁵ See Appendix C for a summary of field staff roles and priorities

nearly two thirds of the Governing Board members participated in the dialogue process as members of other stakeholder groups; the rest learned of the results in a two hour presentation at their annual meeting. In the end, the results of the dialogue were accepted by the Governing Board.

Project Results

The results of the project are presented in relationship to the objectives of the project:

- Objective: **Understanding of the state-wide leadership challenge and opportunity.**

Result: The state level leaders are confident that leaders at all levels are aware of the demographic challenge to union leadership. The issue was explored by the hundreds of participants in the project state-wide events, and many other regional meetings in which state leaders reported the results of the project and engaged local leaders in dialogue.

- Objective: **Shared vision of collaborative leadership for education in local districts.**

Result: The indicators and measures of *full capacity locals* have been developed and endorsed by all union stakeholders as a shared commitment (see appendix)

- Objective: **Agreement to expectations for relationships between field staff and local leaders.**

Result: Field staff roles and priorities were identified and endorsed by all stakeholder groups. These priorities point to needed changes that will require development of new leadership skills both for field staff and local leaders.

Result: Recommendations of the task force report on staff time allocation included solutions to the problems posed by individual member rights. The recommendations were supported by staff, local leaders and the Governing Board.

- Objective: **Commitment to strategic priorities that leverage the finite resources available.**

Result: Three state level initiatives were supported by all stakeholder groups as well as the Governing Board, as priorities for union resources in 2002:

- Training of individual member rights advocates for all locals
- Planning processes to identify and build on local strengths
- Leadership training for staff and local leaders

Result: State level priorities for subsequent years will be set by the Governing Board from a process that begins with a dialogue between field staff and local leaders about each local's priorities for developing full capacity.

- Objective: **An organizational culture that guides and supports the development of full capacity locals.**

Result: Mutual understanding of all stakeholder groups of common challenges and shared priorities.

Result: Recognition of some existing strengths to be built on and a desire to explore further in this direction.

Result: Recognition that a new kind of collaborative leadership is needed; the current organizational culture supports problem-focused leadership.

Current Challenges/“Learnings”

- The need to develop capacity for dialogues that involve all internal union stakeholders and that result in the discovery of common ground and committed action.
- The need to expand the dialogue process to include all union stakeholders, especially in local communities, in ways that result in mutual understanding and support.
- The need to enhance the capacity for collaborative leadership at all levels through training and coaching. Union leaders do not fully recognize the potential impact of their participation, or non participation, in the dialogue process.
- The need to maintain momentum through timely implementation of the project commitments in the face of skepticism that the promising results to-date may turn out to be yet another short-lived “top” priority.

Proposed Next Steps to Support 2002 Initiatives

Training and coaching introduced in a way that develops and supports collaboration and coordinates with other Education Minnesota initiatives:

- Provide training and coaching to develop field staff skills for partnership and collaboration, including facilitation, productive conversations, effective dialogue, and appreciative inquiry skills.
- Planning for locals based on the results that emerge from the appreciative inquiry process.
- An integrated leadership development program.

Appendix A

Education Minnesota

Project for Full Capacity Locals

Facilitated by Mobius, Inc. Consultants 2001-2002

Objectives of the Project

- Understanding of the state-wide leadership challenge and opportunity.
- Shared vision of collaborative leadership for education in local districts.
- Agreement to expectations for relationships between Field Staff and Local Leaders.
- Commitment to strategic priorities that leverage the finite resources available.
- An organizational culture that guides and supports the development of full capacity locals.

Events completed:

- **June 21, 2001** **Project Leadership Team Meeting (12 participants)**
- **July 23, 2001** **Multi-Stakeholder Dialogue (35 participants)**
- **August 7, 2001** **Local Presidents Dialogue at Summer Seminar (60)**
- **October 23, 2001** **Field Staff and Program Staff Dialogue (70)**
- **November 15, 2001** **Release-time Presidents and Staff Dialogue (26)**
- **December 4, 2001** **Field Staff and Program Staff (70)**
- **January 2001** **Report from Staff Time Allocation and Individual
Member Rights Task Force**
- **January 24, 2002** **Staff Meeting: Member rights issues task-force &
Proposal for 2002 Initiatives (70)**
- **February 1-2, 2002** **Council of Local Presidents and Multi-stakeholder
group (35)**
- **February 16, 2002** **Presidents Recognition Weekend (150)**

Education Minnesota

Project for Full Capacity Locals

Events and Results to Date Feb 1, 2002

1. Project Leadership Team (June 2001) was formed to work with Mobius, Inc. consultants to lead a year long development process. Team includes: Judy Schaubach, Sandra Peterson, Larry Wicks, Mike Katzenmeyer, Kate Jackson, David Moracco, Lisa Nentl-Bloom, Linda Owen, Sue Vento, Greg Burns, Greg McNeilly, (and John Borgen as project facilitator).

Results:

- Proposal for a wellness model
- Preliminary “Indicators of a Full Capacity Local”
- Plan to involve all stakeholder viewpoints in a year long process

2. Multi-Stakeholder Dialogue (July 23-24, 2001) 35 participants:

- Local Presidents from different situations
- State level leadership
- Field staff
- Program Staff

Results:

- Mutual understanding of differing viewpoints
- Recognition of common ground
- Formulation of “Indicators and Measures of Full Capacity Local”
- Determination that their work be seen as the beginning, not cut in stone
- Plan for next steps in the state-wide dialogue
- Staff time allocation for member rights issues task-force established

3. Local President's Response (August 2001) 60 Local Presidents

Results:

- Preliminary formulation of the “Indicators of a Full Capacity Local” seen as a useful guide for assessing local capacity and setting priorities, especially for new leaders.
- Indicators help assess challenges at the local level and point to needed Field Staff support.
- Appreciation and concern for the high level of demand placed on Field Staff.
- Priorities for locals unions should be formulated in a dialogue between Local Leaders and their Field Staff.
- Presidents underlined the value of opportunities to network with other locals.
- Agreement that the “Indicators of a Full Capacity Local” be reviewed and modified as a DRAFT until all voices have been taken into account.

4. Field and Program Staff Dialogue (October 2001) 70 participants

Results:

1. Shared understanding of Local Presidents priority Indicators of Full Capacity Local and requests for support from Field Staff to reach full capacity.
2. Initial formulation of Field Staff roles and responsibilities to support full capacity locals.
3. Agreement to next steps in the process to create a proposal for FS responsibilities for multi-stakeholder dialogue and response.

5. Release-time Presidents and Staff Dialogue

(November 2001) 16 Release-time Presidents, 5 Field Staff, 5 Program Staff

Results:

- General agreement to the indicators of Full Capacity Locals and observation that some locals are good models of full capacity.
- Shared understanding of Local Presidents and Staff priorities for Full Capacity Locals.
- Request to know what support locals will receive from the state to support development of full capacity.

6. Field and Program Staff Dialogue (December 2001) 70 participants*Results:*

- Agreement that the Field Staff Roles and Priorities while perhaps “ideal” assume a situation which doesn’t exist.
- The demands of locals on Field Staff time to support individual member rights advocacy makes the proposed Field Staff priorities unrealistic.
- Agreement that the implications of the Full Capacity Indicators for Field Staff and Program Staff responsibilities will need to be worked out in dialogue with Local Presidents and union leaders at all levels.

7. Recommendations of Staff Time Allocation for Member Rights Issues Task Force (January 2002)**8. Field and Program Staff Reaction to Task Force Recommendations**
(January 2001) 70 participants*Results:*

- Agreement to the direction of the Task Force recommendations.
- Understanding of the priority 2002 Full Capacity Locals initiatives proposed by the President.
- Identification of Problems, Issues and Concerns about the proposed 2002 Full Capacity Locals initiatives.

9. Council of Local Presidents and Multi-stakeholder Group (February 2002)
35 participants*Results:*

- Agreement to the direction of the Task Force recommendations.
- Endorsement of proposed 2002 Initiatives for developing full Capacity Locals for consideration by all Local Leaders and Education Minnesota staff.
- Identification of what already “works” to support Full Capacity Locals.
- Ideas for actions to ensure success of the three 2002 initiatives.

Appendix B

**Draft: Education Minnesota Local Union-
Indicators of Full Capacity****1. Leaders (Formal and Informal) Work as a Team**

- *Key positions identified within a defined structure*
 - Political Action¹ Committee
 - Member Rights
 - Bargaining team
- *Leadership team commits adequate time and energy*
- *Leaders are well-trained and well-informed*
- *Leadership diversity ensures full access and continuity*
- *Effective two-way communication*
- *Expectations of leaders are clear, shared, and balanced*
- *Leaders share a vision, goals, priorities and plans*

¹. ○ = illustrative examples

2. Connected to Local Community

- *Connected to organized labor both inside/outside district*
- *Connected to local community organizations*
- *Visible outreach to local community*
 - Scholarships
 - Food shelf
- *Union name is recognized in the community*
- *Member affiliation with local organizations is known*
- *Public dialogue seeking community input*
- *Public dialogue to support public education*

3. Advocate for Excellence in Teaching\Learning

- *Peer assistance and review program*
 - Beginning and non-tenured
 - Union takes active role in remediation/evaluation
- *Local union professional issues committee*
- *Local budget supports professional issues*
- *Successful probationary teachers*
- *Active staff development committee*
- *Defined structure for staff development*
- *Union role in selecting staff development committee members*

4. Infrastructure Developed

- *Defined (written) structure gone over with all members*
 - Constitution & bylaws
 - Job descriptions
 - Committees
- *Infrastructure reflects local goals*
- *Capacity to train new leaders*
- *Communication is two-way*
 - Inter/intra
 - Vertical/horizontal
- *School site leadership structure*
- *Updated (annual) effectiveness measures for internal accountability*
- *Implementation plan for development*

5. Support for New Members

- *Mentoring and induction plan by Local*
- *Orientation for all new members*
 - Contract review
 - Union involvement
 - Social activities
- *Participation in continuing education*
- *Informed on staff development/continuing education*
- *Recognition for members*
 - Special achievements
 - Continuing contract status
 - National board certification
 - Leadership in the union
- *People feel connected and have fun*

6. Political Action Structure

- *Forum for candidates and issues*
- *Active governmental relations committee chair*
- *Budgeted financial commitment*
- *Structure defined including goals and plan*
- *Coalition building*
- *Joint ventures with District/community stakeholders*
- *PAC fundraising (for local)*
- *Federal PAC fundraising network*
- *Connected state-wide regional networks*
- *Membership awareness and education*

7. Members Network at All Levels

- *Local sends delegate to regional/state/national affiliates funded by local budget*
- *Leadership encouraged to attend state/regional/national committees and governing structures*
- *Members are connected to state/national opportunities*
- *Identify intermediate structures that match local needs*
- *Participation in on-line community*

8. Self-Reliance

- *Evaluate local needs and set goals*
- *Support from experienced members*
- *Acknowledge/appreciate history of local*
- *Recognize retirees*
 - *Lifetime achievement award*
 - *Retiring teachers*
- *Acknowledge local achievements*
- *Plan for leadership succession*
- *Establish/develop a sense of community, member ownership of local organization*

9. Capacity to Maintain Legal Responsibilities (including Bargaining and Contractual Obligations)

- *Members have access to members rights structure*
 - *Established (known to members)*
 - *Supported by members*
- *Strong negotiations committee (with connection to field staff)*
- *Chain of command followed*
- *Ready access to field staff support*
- *Active meet and confer committee*
 - *Regular schedule*
- *Long range plan (proactive)*
 - *Member and local needs*
 - *Contract*
 - *Assessment*
- *Labor management committee*
- *State-wide/regional networking*

10. Conscious Advocacy of Union Mission

- *Ongoing discussion of purpose of advocacy and collectivism*
- *Visible advocacy for teaching/learning issues*
- *Mutual respect and support for other unions and affiliates*
- *Evidence of union talk*
- *Professional unionism*
- *Public knows dual mission of union-terms and conditions of employment and quality teaching and learning*

11. Financial Systems in Place

- *Budget and clear budget development process*
- *Effective systems for collecting information*
 - *Membership records*
- *Financial audit system*
- *Compliance with laws*
- *Adequate dues to cover local initiatives*
- *Document expense reimbursement process*
- *Accurate accounting of local, state and national dues*
- *Adequate reserves*
 - *Crisis funds*
- *Structure and accounting system for dues and budget*
- *Systematic collection and transmission*

Appendix C

Field Staff Roles and Proposed Priorities
To Develop Full Capacity Locals:**A. Trainer\Teacher (135 items organized by indicator):**

To provide timely training relevant to the priorities locals have assigned to the development of their full capacity.

- Capacity to Maintain Legal Responsibilities (33 items)
- Leaders Work as a Team (27)
- Support for New Members (16)
- Self Reliance (12)
- Advocate for Excellence in Teaching\Learning (12)
- Infrastructure Developed (10)
- Political Action Structure (8)
- Conscious Advocacy of Union Mission (6)
- Connect to Local Community (4)
- Financial Systems in Place (4)
- Members Network at all Levels (3)

B. Consultant\Resource (116 items)

To offer timely, expert advise to local leaders for responding to current challenges and to develop new capacities and to link locals to relevant resources.

- Advisor (83)
- Resource Link (33)

C. Facilitator (93 items)

To facilitate communication and key stakeholder meetings designed to develop capacities given priority by the locals.

- Communicator 27
- Developer 19
- Informer 12
- Mediator 6
- Networker 29

D. Planner (33 items)

To assist local leaders to formulate a plan and budget that guide action.

- Assessment 7
- Budgeting 2
- Evaluation 1
- Facilitation 16
- Formulation 7

E. Coach\Model\Mentor (23 items)

To support leadership development for locals.

F. Advocate (18 items)

To support local leaders to ensure member rights are respected.

G. Help Develop Structure (15 items)

To ensure essential structure are being developed in a timely way.

H. Political Action (12 items)

To ensure political support for local and state level union initiatives.

I. Other (4 items)

Appendix D

**RECOMMENDATIONS OF THE EDUCATION MINNESOTA
GOVERNING BOARD COMMITTEE ON
STAFF TIME ALLOCATION FOR INDIVIDUAL MEMBER RIGHTS ISSUES**

Purpose

The Education Minnesota Governing Board formed this committee as a distinct and separate part of the Roles and Responsibilities Project taking place within Education Minnesota. As the organization reexamines the roles and responsibilities of professional staff and local leaders, the issue of how much time staff spends addressing individual member concerns in relation to how much time is spent assisting locals to become full capacity locals deserves special scrutiny. It is estimated that field staff spend an average of 50% of their available time working with individual members. The problem created is simple in its nature, but complex in its resolution. The more time field staff spend on individual member concerns, the less time they have to assist locals in becoming full capacity locals.

President Schaubach asked the committee to answer two questions: Is there a way to apportion field staff service to individual members in a way that will allow field staff to use more of their expertise and time in assisting locals to become full capacity locals? Can we forge a more effective and efficient partnership between locals and field staff to address individual members' concerns? President Schaubach further charged the committee that any recommendations should not diminish any member's right to job security, contract maintenance or access to union services or privileges.

Background

The committee began its work by identifying what the term "member rights" really means. Member rights are clearly defined in the Education Minnesota Legal Defense Policy, but the committee felt that there is more to the concept than what is incorporated in the Legal Defense Policy. The committee agreed that member rights could include grievance processing, grievance prevention, discipline issues, professional remediation, and member vs. member conflict and licensure issues. Any work on these issues that cannot be handled by a local person or persons, falls to the field staff. Is there a way to decrease reliance on field staff without jeopardizing a member's right to excellence in representation in any of these areas? If there is a way, field staff time not spent in these areas can be spent on helping locals become full capacity locals.

Recommendations

Goal: To respond to member's needs at the most effective level (the local level).

Every Education Minnesota local should:

Adopt a member rights policy. This policy should enumerate what members' rights are and who will be responsible for preserving those rights. The policy should include a grievance processing procedure, a procedure for handling member complaints, and clearly identify who has the responsibility to contact Education Minnesota for assistance.

Identify member rights advocate(s) who will become educated in member rights issues and serve in the position for a considerable length of time, in order to provide continuity in knowledge and training. This person will understand the local collective bargaining agreement as well as relevant state law.

Establish local procedures that discourage individual member issues from being brought directly to field staff by anyone other than the local president or the local president's designee. Although there may be exceptions for highly confidential individual matters, individual members should first address their concerns to designated people at the local level.

Handle issues of professional remediation to the greatest extent possible. Education Minnesota Professional Issues staff should develop guidelines and training to support this.

Local relicensing committees should handle individual licensing issues, with assistance from Education Minnesota Professional Issues or legal staff, if necessary.

Education Minnesota field staff should:

Provide training to assist the locals in adopting member right's policies. This training should be done on a regional basis, but every local will have this training.

Provide initial training to designated new member rights advocates. This training should be done on a regional basis, with the intent that every member rights advocate will be trained.

Offer all member rights advocates training updates at Intermediate Organization meetings or other regional meetings.

Through modeling, demonstration and training, assist locals toward resolving individual member problems at the local level, without the onsite intervention of field staff.

If possible, refer all phone calls from individual members back to the designated local president or president's designee, unless the individual concern is of a highly confidential nature.

Inform the local president or president's designee of calls from individual members.

Education Minnesota should provide the resources to support the above recommendations. Strategies could include:

Establishing a model training program leading to certification as an Education Minnesota Member Rights Advocate.

Creating a model member rights policy that can be used by locals.

Providing release time for training for member rights advocates.

Providing recognition for member rights advocates.

Providing training and support for field staff in effective strategies for assisting locals to become more self-reliant in addressing individual members' concerns.

Maintaining a listserv and member rights advocates section on the Online Community.

Developing programs for Education Minnesota Student Members to increase their awareness of individual member rights and concerns.

The committee further recommends that Education Minnesota adopt policies that clarify the role that field staff should play in member vs. member disputes.

Appendix E

Mobius, Inc.; Organization Development Consultants**Co-Presidents**

William Stockton, Ph.D., is the creator of the Mobius Model, used nationally and internationally for coaching and facilitating human development. William brings the perspective of a cultural anthropologist to the organization change process. He taught at the University of Minnesota ten years, conducted field research on culture conflict and has published in the areas of human development, education and health care. He has coached and facilitated collaboration, development and conflict transformation in communities and corporate and nonprofit organizations for twenty-eight years.

Marjorie Burke Herdes, has a degree in international politics and has taught and consulted nationally and internationally. She founded *Mobius, Inc.* with William Stockton in 1991 and has created applications of the Mobius Model for whole-systems development. Marjorie worked as a quality improvement specialist at Honeywell, Inc. before founding Mobius.

William and Marjorie have both worked as teachers: Marjorie as a Montessori teacher, teacher-trainer and school consultant, and William as a high-school social studies teacher. They bring their passion for education to the work that they do with schools and have worked in many schools throughout the Twin Cities.