The Full Capacity Locals Project:
A Report for Education Minnesota
Mobius, Inc.; Organization Development Consultants

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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. 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. 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.

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.

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*. This idea emerged from an expressed desire for the state-wide dialogue to result in a shared vision of "healthy" 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.
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> 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.
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> 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.
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> 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. 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.

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. 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 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

- 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.