# Table of Contents

**Education Minnesota**
- Facts about Education Minnesota ................................................................. 1
- Education Minnesota Decision Making Process ........................................... 2

**Local Governance**

- Local Presidents .......................................................................................... 5
  - Role of Local President ............................................................................... 6
  - Six Important Roles for the President ...................................................... 7
  - Reaching Out & Engaging Members ......................................................... 8
  - Connecting with Aspiring Educators ....................................................... 9
  - Survival Skills for Local Presidents ......................................................... 10
  - Inundated by Education Minnesota Communications? .......................... 11
  - Local President – Field Staff Relationship ............................................ 12
  - Ideas for Year-Round Activities ............................................................... 13

**Infrastructure of Local** .................................................................................. 15
- The Local Constitution and Bylaws ............................................................. 16
- Checklist – Elements of the Constitution and Bylaws ................................. 17
- Constitution and Bylaws Checklist ............................................................. 18
- Education Minnesota Local Constitution Language of Required Articles .... 19
- Election Procedures .................................................................................... 21
- Suggested Sample Language ..................................................................... 22
- Education Minnesota Local Language for Bylaws Powers of General Membership ........................................................................................................ 24

**Role of Local Union Officers** ......................................................................... 25
- Officer Titles for Use by Education Minnesota ........................................... 26
- Member Response Sheet (Sample) ............................................................... 27
- Opportunities for Involvement in Your Local ............................................. 28
- President ...................................................................................................... 29
- Vice-President/President Elect ................................................................. 30
- Secretary ...................................................................................................... 31
- Treasurer ..................................................................................................... 32
- Membership Contact .................................................................................. 33
- Membership Team Members ..................................................................... 34
- Building Contact/Representative ............................................................... 35
- Educational Issues Contact ........................................................................ 36
- Worksite Action Leader (WAL) ................................................................. 37
- Health Care Advocate (HCA) ..................................................................... 38
- Local & Community Action Team (LCAT) .............................................. 39
- Member Rights Contact ............................................................................ 40
- Negotiations Contact and Team ................................................................. 41
- Communications Contact ........................................................................ 42

**Value of Belonging/Member Engagement** .................................................. 43
- Planning Guide to Build Local Capacity .................................................... 44

**Communicating with Members** .................................................................... 45
- Communicating with Members ................................................................. 46
- “No One Told Me” ...................................................................................... 47
**Facts about Education Minnesota**

Education Minnesota formed September 1, 1998, with the merger of the Minnesota Education Association and the Minnesota Federation of Teachers.

**Headquarters**
Education Minnesota
41 Sherburne Avenue
St. Paul, MN 55103-2196
651-227-9541/800-652-9073

**Who We Are**
Education Minnesota is currently made up of 469 locals, and over 89,500 teacher, education support professional, retired, student and substitute members, working together for excellence in education for all Minnesota students.

The organization formed to provide a united voice for public education, leadership in education innovation, dedication to Minnesota students and families, and an unwavering commitment to the welfare of our members. Our members guide Minnesota students from their preschool years through their K-12 education, and on through Minnesota's community and technical colleges, and the University of Minnesota at Duluth and Crookston. Education Minnesota affiliated with the American Federation of Teachers, the National Education Association and the AFL-CIO.

**How We Are Governed**
The Representative Convention of more than 1,000 delegates elected at the local level is the highest governing and policy-making body of the union. Only the Representative Convention may amend the Constitution and Bylaws. [http://www.educationminnesota.org/about/who-we-are/governance-documents](http://www.educationminnesota.org/about/who-we-are/governance-documents)

The Governing Board meets regularly. The Board sets dues in accordance with the bylaws, adopts the budget and assures that Representative Convention directions are carried out. [http://www.educationminnesota.org/about/who-we-are/governing-board](http://www.educationminnesota.org/about/who-we-are/governing-board)

**Officers (all terms of office are for three years), expiring June 30, 2022**

*President* - Denise Specht, Title I Teacher at Golden Lake Elementary in the Centennial School District.

*Vice President* – Bernie Burnham, Elementary Teacher in the Duluth School District.

*Secretary-Treasurer* - Rodney Rowe, Elementary Teacher in the Worthington School District.
Education Minnesota Decision Making Process

Representative Convention

The Representative Convention is the highest decision making body within Education Minnesota. The Convention is held annually each spring. Each local and statewide affiliate is able to send at least one delegate, and additional delegates allocated on a ratio of one delegate for each seventy-five (75) active members or major fraction thereof.

Business of the Representative Convention:
- Election of officers
- Election of three (3) NEA directors
- Election of at-large members to the Education Minnesota Governing Board
- Amend the Constitution & Bylaws of Education Minnesota
- Vote on action items brought before the body
- Approve the organization’s legislative agenda
- Approve the organization’s Statements of Principle

Officers (Article IV of the Education Minnesota Bylaws): The three elected officers of Education Minnesota are the president, vice president and secretary-treasurer. Elected at the Representative Convention, these leaders serve three-year terms and have the responsibility to oversee the management and actions of Education Minnesota.

Governing Board (Article VI of the Bylaws): The Governing Board has the authority to exercise general supervision and management of the affairs of Education Minnesota and meets six times during the year.

The Governing Board Shall Consist of (Article VI, Section 1 of the Bylaws):
- Three (3) officers, elected at large by the Representative Convention delegates;
- One (1) member, elected at large by the Representative Convention delegates from each of the eight (8) at-large zones that are each comprised of two or more Election Districts, as determined by the President with Governing Board approval;
- One (1) higher education/statewide affiliate (MSCF, UEA, and SRSEA) member, elected at large by the Representative Convention delegates;
- Two (2) ESP members, elected at-large by the Representative Convention delegates;
- One (1) member from each Election District, with each such member elected by the active members of that member’s Election District;
- NEA Directors, elected by the Representative Convention delegates;
- The chair of the Ethnic Minority Affairs Committee (EMAC) and members appointed or elected to national governance positions with the AFT or NEA, officer positions with the Minnesota AFL-CIO or, subject to Governing Board approval, officer positions with other related affiliates. Such members are non-voting members of the Governing Board unless they are also elected or appointed to the Governing Board in one of the voting board member categories listed in (a) – (f).
- The president of Education Minnesota Retired, who shall be a voting member of the Governing Board notwithstanding her/his status as a non-active member.
i. The president of EMAE, who shall be a voting member of the Governing Board notwithstanding his/her status as a non-active member.

Powers and Duties of the Governing Board (Article VI, Section 2 of the Bylaws): The Governing Board has the duties assigned to it in the Constitution (Article VI, Section 3) and shall implement the actions and commitments of the Representative Convention. The Governing Board shall have the authority and duty to:

a. Set their own administrative rules and approve a calendar for meetings.
b. Adopt a budget for Education Minnesota.
c. Set the salaries of Education Minnesota officers and staff and approve employment contracts.
d. Annually set membership dues in accordance with the formulas in these bylaws.
e. Determine the time and place for the Representative Convention.
f. Conduct a no-confidence vote in the Executive Director and refer the matter to the Executive Committee for investigation. The Governing Board shall then act upon the recommendation of the Executive Committee.
g. Recognize new locals by a majority vote.

Executive Committee (Article VIII of the Bylaws): The Governing Board shall elect an Executive Committee made up of nine (9) members. Members shall include the three (3) officers, three (3) Governing Board members from those elected from Election Districts, and three (3) Governing Board members from those elected at large by the Representative Convention delegates. Beginning July 1, 2019, Executive Committee membership shall consist of three (3) officers, four (4) Governing Board members from those elected from 16 Election Districts, and two (2) Governing Board members from those elected at-large by the Representative Convention delegates.

The Executive Committee Authority (Article VIII, Section 2 of the Bylaws): Between meetings of the Governing Board, the Executive Committee shall have the power to make decisions consistent with the provisions of Education Minnesota’s Constitution and Bylaws and actions of the Representative Convention. The Executive Committee shall:

a. Serve as the Budget and Finance Committee of Education Minnesota and direct independent auditing of all funds and property of Education Minnesota.
b. Have fiduciary responsibility for Education Minnesota’s pension plan(s).
c. Ratify any endorsements by the Political Action Committee prior to public announcement.
d. Conduct an investigation upon a vote of no-confidence by the Governing Board and make recommendations regarding the continued employment of the Executive Director to the Governing Board.
e. Act upon recommendation of the President on the termination of the Executive Director.
f. Have the authority, in the event of an emergency, by a two-thirds (2/3) vote, to postpone the Representative Convention.
g. Serve as the Officer Compensation Committee (OCC), chaired by the Personnel Committee Chair. The OCC shall annually:
   1. Recommend the officer compensation package to the full Governing Board.
   2. Receive a report of officer duties as assigned by the President.
   3. Conduct an evaluation of the Executive Director.
Standing Committees (Article X of the Bylaws): The following Standing Committees shall be established:

**Council of Local Presidents (CLP):** Members of the CLP must be current local presidents. The CLP shall:

a. Work directly with the President to communicate local and regional concerns and to provide timely information to other local presidents;

b. Identify local issues and needs;

c. Advise the President on local and regional matters;

d. Serve as a liaison between Education Minnesota and local presidents;

e. Review organizational policies as they impact locals and members;

f. Recommend local leadership training needs;

g. Advise on issues related to collective bargaining, contracts and organizing;

h. Meet as subcommittees as needed.

**Legislative Action Committee:** The Legislative Action Committee shall consider and recommend legislative positions to the elected officers and leaders in Education Minnesota. The committee shall develop recommendations regarding issues and agencies external to Education Minnesota as well as recommend changes or additions to Education Minnesota’s legislative positions. The committee shall work to engage and mobilize members in advocating for Education Minnesota’s legislative positions. The committee may recommend task forces and ad hoc committees for additional study.

**Professional Advocacy Committee:** The Professional Advocacy Committee shall consider and recommend policies and programs to the elected officers and other leaders regarding matters pertinent to the professional lives, health and wellbeing of members. This committee shall:

a. Identify and recommend policy on new trends in education;

b. Identify and recommend areas of need for professional growth opportunities for members;

c. Recommend topics for further study within the organization.
Local Presidents
Role of Local President

**Suggested Responsibilities**

1. Serve as the official spokesperson for the local:
   - To the membership
   - To the administration
   - To the community
   - To the Intermediate Organization, Education Minnesota, AFT, NEA
2. Appoint committee chairs and make committee assignments per local constitution & bylaws. Delegate responsibility and hold chairs accountable for their duties.
3. Serve as ex-officio member of all committees.
4. Prepare for and conduct local meetings.
5. Listen to your members and refer them to the appropriate committee for needed assistance.
6. Involve the governance structure and total membership in the decision-making process.
7. In conjunction with your executive committee/board, develop goals to complete during the year using the components of the Member Engagement to assist in the planning.
8. Be aware of pending grievances, status of negotiations and happenings in the district.
9. Appoint and serve on the Meet & Confer Committee as provided in your local constitution and bylaws.
10. Work with your treasurer to prepare and monitor a local budget; see that dues are forwarded and appropriate reports (for example, IRS) filed.
11. Be accessible to members and their needs.
12. Know your Collective Bargaining Agreement.
13. Attend appropriate training/leadership conferences at the intermediate, state or national levels.
14. Work with the Member Rights Advocates in the local to establish a system to track and monitor grievances and grievance timelines.
15. Monitor the school district’s requests to the Professional Educator Licensing Standards Board (PELSB) regarding application for Tier 1 and 2 licenses and Out-of-Field Permissions. An Out-of-Field Permission requires the signature of the teacher; Check with members to make sure they understand that they have the opportunity to agree or not agree with the permission request. Also, please be vigilant in making sure districts are gathering member signatures (and their subsequent agreement to the assignment) on OFP permission applications. Districts have been known to forge member signatures, and they have been known to suggest to members that they can assign members out of licensure field however they wish. These applications should proceed only when members knowingly agree to them.
Six Important Roles for the President

1. **BE INFORMED**
   A. What services are available or desired?
   B. Where to Go for Help or Information
   C. Leaders – Local, Intermediate Organization, State, National
      *Note*: Do you know them? Do they know you?

2. **ORGANIZE**
   A. What:
      1. Personal Life
      2. Job
      3. Union Role
   B. How:
      1. Establish Plans or Goals
      3. Follow-Up
      4. + Help
      5. + Praise

3. **DELEGATE**
   A. Five Steps to Successful Delegation:
      1. Clearly Identify Task – What, When
      2. Request Commitment
      3. Provide Necessary Materials
      4. Follow-Up
      5. Thank you!

4. **COMMUNICATE**
   A. Official Spokesperson
   B. Two-way Communication

5. **BE A LEADER**
   A. Meetings:
      1. Fair, Orderly
      2. Parliamentary Procedure
      3. Constitution & Bylaws
   B. Advocate:
      1. For the Local
      2. For the Individual

6. **FIDUCIARY RESPONSIBILITY**
   A. Oversight for:
      1. Financial Matters of the Local/Budget
      2. Transmittal of Dues to Education Minnesota
      3. Internal Revenue Service Regulations
      4. Campaign Finance Reporting
Reaching Out & Engaging Members

How a Local President Involves Members

Here are some brainstormed ideas on ways to identify member needs:

- Include a response form on all communications
- Develop a “Needs Form” for members to direct to the president
- Use informal conversation to lead to “Needs List”
- Personalize flyers with Local logo
- Try homemade posters
- Put signs up on bulletin board or circulate
- Give announcements over intercom using standard form
- Identify other listeners at various levels; i.e., specific interest groups, department level, grade level, coffee breaks, etc.
- Hold building meetings
- Hold informal meetings
- Report Local action items in a “News Update”
- Summarize Local actions with tear-off response sheet
- Discuss issues at lunch
- Have outside resources present ideas at building meetings
- Improve bulletin boards…keep them updated!
- Systematize collection of information from listeners once per month
- Frequent, short informational meetings and ask for help from members
- Use mailbox questionnaire
- Try personal contact on a regular basis (contact at least 3 people every week)
- Use a question box or suggestion box
- Try a Presidential report form
- Pass along memos
- Post posters
- Establish a hotline
- Increase access to phones
- Make use of mock telegrams and assemblies
- Formalize or record – coffee conversations – be careful here
- Officers could conduct information and feedback sessions at building meetings
- Get Negotiations Committee to visit all buildings to get feedback proposals in concept form
- Help members identify grievances
Connecting with Aspiring Educators
Finding ways to engage and support the student teachers in your building

Aspiring Educators are the Future of our Profession and Union

As a local leader, you know the importance of connecting and engaging with your members on a regular basis. It is equally important to connect with the student teachers who are in your classroom; after all, those educators will soon be your colleagues and union brothers and sisters. We want to work together to ensure these student teachers stay in the profession and look to their future union as a source of support and guidance.

More than half—52.9 percent—of teachers holding an active teaching license are not currently teaching in a Minnesota public school, and the number of teachers leaving the profession has increased 67 percent since 2010. Further, 33 percent of teachers leave within their first five years, and many cite a lack of support as being one of the primary reasons they leave. Because of these figures, this resource offers tips and tools to connect with and encourage your student teachers to be lifelong members of the education community.

Preparing for Tough Questions
One of the best ways to respond to tough questions is to use the AAR method:
- Affirm: Let them know you are listening, that you understand, and that their feelings are valid. This establishes respect.
- Answer: Give a truthful, concise answer to the questions (give information).
- Redirect: Bring the conversation back to your message (build our power).

For example:
- Costs are expensive and I have student loan payments.
  - We understand it is difficult. Financial decisions are some of the most urgent and stressful in our hectic lives (affirm).
  - The return on your investment outweighs what you pay in debt. Workers in unions earn 33% more than similar workers without unions—and they are more likely to have employer-provided health and retirement plans (answer).
- The value of membership goes far beyond better wages and benefits. Our collective power allows us to fight for better working conditions and the things our students need. A powerful union means more and better jobs, higher wages and benefits, and voice in decisions that matter (redirect).

10-Minute Meetings
Many of our student teachers are stepping into the classroom for the first time and are looking to their mentors and cooperating teachers for tips, advice, and guidance. The union can and should play a big role in fostering that relationship from the moment student teaching begins.

Here is a list of 10-minute meeting ideas your local can use for monthly meetings to engage your student teachers and new hires:
- Collegial Relationships
- Conference Tips
- Code of Ethics
- Education Debt
- Connecting With Parents
- Comprehensive Unionism
- Keeping Student Data Private
- Using School Technology
- Professional Boundaries

Information handouts and lesson plans for these 10-minute meetings can be found at www.educationminnesota.org/teachers-only/member-engagement/resource/new-hires-engagement.

One-to-One Conversations & Conversation Starters
An effective 1:1 conversation will inform you about what is important to your pre-service teacher in your classroom building. The aim of the 1:1 conversation is to initiate a professional relationship with an aspiring educator and to show the value of belonging to the local union. These conversations are intentional, aimed to build trust and to identify values, interests, and motivation. The conversations are ongoing and should create strong bonds, increase strength in the profession, and are open ended. Active listening is key to the 1:1 conversation. To get you started here are some conversation starters:

1. What makes you excited about a career in teaching?
2. What makes you scared about a career in teaching?
3. Do you know where to go for professional support when you need it?
4. What would you like to learn/experience this year?

EFFECTIVE RELATIONAL CONVERSATIONS

Use probing questions
Develop deeper relationships
Increase member engagement
Create stronger faculty
Are engaging

Are intentional conversations
Build more interactive values, interests, and motivations:
Use active listening skills
Survival Skills for Local Presidents

“10 Keys to Self-Confidence”

1. **Become Conscious of Your Behavior**
   Seek the assistance of a good friend/colleague in assessing how you present yourself - your posture, speaking patterns, voice quality, eye contact and gestures.

2. **Amend Your “Self-talk”**
   Take a new, positive look at yourself. Send gentle, constructive messages to yourself. Recognize and applaud your achievements.

3. **Schedule Time for You and Your Friends**
   Whether it is “alone” time or time with family or friends, it is important to maintain a healthy balance in your life. “All work and no play” is the first step to burnout, frustration and stress-related diseases.

4. **Expand Your Power**
   Your ability to cooperate and lead others to consensus, are signs of self-confidence, which can reinforce your power and enable you to achieve more than you could alone.

5. **Control Your Feelings**
   Instead of venting your anger in a frustrating situation, allow your co-workers time to recognize their mistakes without having them lose their self-esteem. This will reveal your self-confidence in an important way.

6. **Live in the Present**
   Concentrate on the task-at-hand. You will accomplish more and feel better about yourself. Likewise, stop letting the high goals you have set for yourself in the future make you feel discouraged about your current programs.

7. **Develop Your Non-Work Related Talents**
   Developing your talents outside the work area helps you grow, keeps your options open for the future, and does wonders for your self-confidence.

8. **Take Risks**
   The self-confident life is a dynamic life of new ideas, new relationships and new environments. It is a life of change, and change demands you take new risks. Sometimes the “riskiest risk” is asking for help, but it is often the first step to needed change(s).

9. **Tickle Your Funny Bone**
   A good laugh at yourself or the situation can relieve tension, frustration and anger. It is good for the soul and the body! Take generous doses regularly!

10. **Plant Yourself**
    Planting yourself means changing things right where you are instead of dreaming and longing for some unreachable utopia.

*(Adapted for leaders from an article in New Woman magazine)*
WE HAVEN’T DESTROYED A SINGLE PRESIDENT YET! DO YOU SOMETIMES WONDER HOW TO PROCESS IT ALL? HERE ARE SOME TIPS:

Communications:

- Set a specific time to deal with your communications.
- Open all mail the same day that it arrives and look for deadlines. Record all deadlines in your calendar for future reference. (Look at your calendar each day!)
- Scan the information for important ideas. If it requires action, do it, delegate it or set a time to deal with it!
- If others would enjoy seeing it, make copies for all individuals/buildings and have it posted.
- If you have seen it before, pass it on to other local leaders. Share the information. Just putting it in the lounge for others to peruse is an idea worth considering.
- Be an active communicator.

E-MAIL:

1. Set a specific time to review your e-mail.

2. Have distribution lists created and route immediately to:
   - Building Representatives
   - Committee Chairs
   - Executive Committee/Board
   - General Membership
   - Negotiators
   - Special Interest Groups (New Hires)
Local President—Field Staff Relationship

As a local leader, you can:
- Recognize the strength of your local.
- Make decisions about how you want to develop your local.
- Set goals for the coming year.

The decisions you make in your local are independent and autonomous. The role of field staff is to provide guidance to assist you in making decisions in your local and to help you carry them out.

You can use field staff as:

Trainers:
- To provide training on a variety of topics, determined by the needs the local establishes.
- To provide training to assist the local to carry out development programs, such as Negotiations, Member Rights, Government Relations, and Health Care Advocate programs.

Consultants/Resources:
- To offer expert advice to local leaders for responding to current challenges and issues.
- To assist local leaders by providing resources from the state and national organizations.
- To link local leaders to Education Minnesota program specialists, such as Legal, Public Affairs/Communications, Professional Issues, Membership, and Negotiations.

Facilitators:
- To facilitate communication about the full capacity locals survey and goal setting.
- To provide the opportunity for communication and networking among local leaders.

Planners:
- To assist local leaders to develop an action plan based on local goals.
- To assist local leaders to develop a budget that supports the local’s action plan.
- To work with local leaders to ensure essential structures are in place in the local.

Coaches/Models/Mentors:
- To support locals in developing leadership.
- To maintain communication with local leaders.

Advocates for Member Rights:
- To support local leaders to ensure & uphold member rights.
- To support local leaders with member rights issues when requested.

Two-way communication is the key to a successful local president—field staff relationship.
Ideas for Year-Round Activities

AUGUST/SEPTEMBER

_____ Attend the Education Minnesota Summer Seminar.
_____ Complete development of the year-long membership recruitment and retention plan and begin implantation.
_____ Connect with potential members in their first week on the job.
_____ Schedule a workshop for new teachers to assist them through their first year.
_____ Plan events and promotions!!! (i.e. a potluck picnic, a “tailgate” breakfast, beverage and cheese socials, a golf/tennis tournament, or a dance). Schedule events in conjunction with a general membership meeting.
_____ Promote participation and attendance at the Minnesota Educator Academy (MEA) (the third Thursday of October) and the ESP Regional Meetings.
_____ Complete recruitment/appointment of the local leadership team.
_____ Plan for American Education Week and National Education Support Professional Day, which are held mid-November; promote recommended candidates for November elections and other timely activities.
_____ Schedule a training/briefing session for site representatives (especially for middle and large size locals).
_____ Attend the state AFL-CIO Convention.

OCTOBER/NOVEMBER

_____ Implement monthly aspects of the year-long membership recruitment and retention plan.
_____ Promote the Minnesota Educator Academy (MEA) and American Education Week!
_____ Survey members regarding bargaining issues/strategies.
_____ Plan special membership activities (i.e. Toys for Tots, food shelf drive).
_____ Develop holiday suggestions for parents for activities during long weekends and breaks for kids.
_____ Get out the vote on Election Day!
_____ Promote the recommended candidates!
_____ Elect delegates and alternates to the Education Minnesota Representative Convention.

DECEMBER/JANUARY

_____ Implement monthly aspects of the year-long membership recruitment and retention plan.
Plan and promote a “New Year” event! (A general membership meeting/social with suggested topics... goal setting... stress management... time management... dealing with difficult people... or financial or retirement planning.)

Promote Education Minnesota’s legislative program and involvement in local and lobbying activities.

FEBRUARY/MARCH

Improve monthly aspects of the year-long membership recruitment and retention plan.

Survey members on possible issues and actions at the Representative Convention.

Recruit candidates for local officer positions (refer to your Constitution for specifics).

Election District elections held in local (March).

Forward names of local delegates and alternates to the Representative Convention, to the office of the President in March.

APRIL/MAY

Implement monthly aspects of the year-long membership recruitment and retention plan.

Develop a National Teacher Day program, promotion and activities!

Promote, recruit and register participants for the Summer Seminar.

Attend the Education Minnesota Representative Convention.

Report on Representative Convention action to members.

Plan and promote a year-end general membership event and evaluate the effectiveness of the yearlong membership recruitment and retention plan and set goals for next year.

Recognize and thank local volunteers!

Year-end evaluation of Local programs: calendar, budget, member involvement, and internal/external communications.

The deadline for submitting the names of local delegates who will attend the NEA Representative Assembly to Education Minnesota is in April.

JUNE/JULY

Develop a year-long membership recruitment and retention plan.

Use evaluations and/or member survey results to establish:

- Goals
- Activities
- Calendar
- Budget

Recruit and train/brief leadership team (i.e. local committee/council chairs and officers).

Recruit new members (develop a special recruitment program, which includes a congratulatory note, direct one-to-one contact, sharing of information about the organization, an invitation to join and assistance/orientation regarding the community and district).

Members attend AFT and NEA national meetings.
Infrastructure of Local

The foundation of a local is the governing documents that define how the local makes its decisions, who the leadership will be and the authority/roles they have in the local. In addition, the infrastructure determines how communication will take place within the membership, and what goals the local will adopt to set a course for the future. In this section, you will find information on:

1. The local Constitution & Bylaws.
2. Ideas for communicating with members (local meetings, setting agendas, parliamentary procedure, Education Minnesota’s Online Community).
3. External communications.
The Local Constitution and Bylaws

1. Each local must have a current Constitution and Bylaws. The Constitution contains the fundamental principles that govern the operation of an organization. The Bylaws establish the specific rules of guidance by which the group is to function. Keep in mind the following three provisions must be included in order to receive assistance from the Education Minnesota Organizing and Settlement Fund:

   ➢ Collective Bargaining Agreement ratification process
   ➢ Strike authorization process
   ➢ Membership discipline provision

2. Review your local Constitution and Bylaws annually, and if amended, do so in accordance with the provisions of the current Constitution and Bylaws. A checklist of what should be in a local Constitution and Bylaws supplied on the following page.

3. In addition, locals should have a policy book. This defines the operating principles of the local that have been established by the appropriate local decision making body (i.e. executive board/committee, building representatives, or membership). Since it is easier to amend policies than Constitutions and Bylaws, the policy book should outline such decisions as how honorariums and bills are to be paid, and the names of standing committees not included in the Constitution or Bylaws. Review local policies periodically.

4. Consult with your Field Staff when amending the Constitution and Bylaws of your local. Those who work for private employers will have different requirements and should be especially careful to work with their Field Staff.

5. A copy of the approved amended Constitution and the approved amended Bylaws must be submitted to Education Minnesota:

   Education Minnesota
   Attn: Ilissa Morrow
   41 Sherburne Avenue
   St. Paul, MN  55103

6. If a local is changing its name or there is substantial change in the body of the Constitution & Bylaws, also send a copy to the BMS:

   Bureau of Mediation Services
   1380 Energy Lane, Suite 2
   St. Paul, MN 55108
Checklist
Elements of the Constitution and Bylaws

Among other topics, your local’s Constitution and Bylaws should spell out:

- Your local’s governance structure and how decisions will be made for the local;
- The titles and duties of officers;
- The titles and responsibilities of standing committees;
- The terms of officers and the rules governing their election;
- The frequency of executive board, general membership and/or representative assembly meetings;
- The rules governing meetings (ex: Roberts’ Rules of Order Newly Revised); and
- Procedures for amending Constitution and Bylaws.

As you review your Constitution and Bylaws, consider which rules you want to put in the Constitution (where a 2/3 vote and advance notice is normally needed for amendment), and those you want to put in the Bylaws (which normally require only a majority vote to amend). Most locals put meeting rules and dues provisions in the Bylaws. Membership needs to approve Constitution and Bylaws changes.
Constitution & Bylaws Checklist

Name of Affiliate __________________________

Constitution Provisions
- Name
- Preamble*
- Affiliation*
- Officers
- Governance Structure
- Term of Office
- Collective Bargaining Agreement Ratification Provisions**
- Amended Date of Constitution Included in Document

Bylaws Provisions
- Meetings
- Powers of General Membership (Dues and Budget)*
- Qualification and Duties/Powers of Officers
- Powers of Executive Board and/or Representative Assembly
- Vacancies
- Elections of Delegates (State & National)*
- Provisions for Appointing of Election Committee and Task Force Chairs
- Duties of Standing Committees/Task Forces
- Quorum Needed to Conduct Business
- Amending Procedure*
- Parliamentary Authority (Robert’s Rules Newly Revised)*
- Amended Date of Bylaws Included in Document
- Grievance Decision Process
- Negotiation Team Structure
- Procedures for Memorandum of Understandings (MOUs)
- Maintenance of Membership

Policy Manual/Policy Maintenance
- Membership Policies
- Community and Political Involvement
- Absentee Ballot Procedures
- Maintenance of Membership
- Attendance at Conferences, Conventions
- Meet and Confer Procedure
- Fiscal Policies, Expenses, Honorariums

* Language provided by Education Minnesota must be part of all local Constitutions and Bylaws.

** Language provided by Education Minnesota must be part of a local’s Constitution in order to receive assistance from the Education Minnesota Organizing for Settlement Fund.
Education Minnesota Local Constitution
Language of Required Articles

Preamble
We, the members of the ____________________, Education Minnesota, American Federation of Teachers, and National Education Association, believing that the active participation of (fill in with the appropriate designation as noted below) ___________________________ in the development of educational policy is essential for sound education in a democratic society, have joined together, as herein defined in this Constitution and Bylaws, for the purpose of exerting a collective and positive influence on education at ___________________________ (name or number of education facility) _________________.

Note 1: If the local membership is to be teachers/instructors only, insert non-supervisory licensed education personnel in place of the underlined language.

Note 2: For education support professionals that are a separate local in a school district, the following language should be inserted in place of the underlined wording: educational support professionals.

(Local name) ___________________________ shall provide a united voice for public education, leadership in education innovation, dedication to Minnesota students and families, and an unwavering commitment to the welfare of our members.

(Local name) ___________________________ shall be a local organization that provides unstinting professional service to its members by building and maintaining a strong, effective local and by promoting instructional advocacy. The Education Minnesota (local name) __________ ____________ shall be committed to democracy in the workplace and within the organization.

If any provisions of this Constitution and Bylaws conflict with or violate the Constitution and Bylaws of Education Minnesota, AFT, or NEA, the provisions of the state and national organization shall supersede those contained herein.

Affiliations
The (Local name) ____________________________ is affiliated with Education Minnesota, the American Federation of Teachers and, the National Education Association, and the [name of area labor council/regional labor federation of the AFL-CIO] in accordance with the provisions of the constitution and bylaws of these bodies. Individuals will be members of Education Minnesota, the American Federation of Teachers, and the National Education Association.
**Membership**

Membership in the (Local Name) ___________________________ shall be in accordance with the Constitution and Bylaws of Education Minnesota, AFT, and NEA. The membership year shall be September 1 through August 31. No one shall hold office in the (Local Name) ___________________________ who is not an active member of Education Minnesota, AFT, and NEA.

**These sections were listed as required and were moved into the Constitution section to be consistent.**

Additional recommended language post-*Janus*:

An employee who chooses not to join as a member will be considered a potential member. Potential members will not be eligible to run for or hold any office, to receive appointment to any position, vote in any election or ratification including contract ratification and strike votes, and shall not be eligible to attend any membership meeting. Potential members may not make financial donations to (Local Name) in lieu of becoming a member. If for any reason there is conflicting information about these rights in any other governance or policy documents, this (section, article) takes precedence.

In addition, you should strongly consider following these recommendations:
- Eliminate all references to fair share, and change to “non-member” or “potential member.”
- If the C&B discusses dues collection, either remove the start date or change it to “the first pay period on or after October 15th.”
Election Procedures

Applicable state and federal laws shall govern all elections.

1. Each member must receive at least a 15-day notice of the procedures and deadlines to file as a candidate for the election, and the date, time and place of the election.
2. There shall be an open nomination process for all elections.
3. Every member must have a fair and equal opportunity to participate in the election without unreasonable impediments.
4. Voting must be by secret ballot.
5. In a contested election, candidates must be allowed to station observers at the polling places.
6. Representatives of the competing candidates should be allowed to observe, but not actually participate in, the counting of ballots.
7. The used, unused and challenged ballots, the envelopes used to return ballots, and other documents related to the election should be safely stored for one year in case there is a challenge to the election.
8. No union funds may be used to support any candidate.
9. The union should comply with reasonable requests to distribute campaign literature at the candidate’s expense.
10. Candidates have the right to inspect the membership list once within 30 days prior to the election. No candidate can have preferential access to the list.
11. If there is only one candidate for a position, the election for the position may be waived and the candidate declared elected. In order to waive such an election, a reasonable period of time must have been provided for nominations, and there shall be no provision allowed for write-in votes for any election.

Note 3: Number 11 is optional. A decision must be made regarding how the local wants to proceed when there is only one candidate for a position. If the local wishes to have the ability to simply declare the person elected without an election, then the above language in #11 must be included as written – but note that the local cannot allow write-in voting for any local election if this procedure is used. If the local wishes to use write-in voting for local elections for all positions, including a position where there is only one candidate, the local could not include language item number 11.
Article _____ Section 1.

Collective Bargaining Agreement Ratification and Strike Vote

The ratification of the Collective Bargaining Agreement between the local and the school district shall take place at a general membership meeting called for that purpose. The vote shall be conducted by secret ballot and all members of the local shall have the right to vote. A majority of those voting is necessary to approve the Collective Bargaining Agreement.

Subd. 1. If the Collective Bargaining Agreement ratification meeting takes place while members are involved in a strike, only members of the bargaining unit who participate in the strike shall be eligible to vote on the proposed Agreement. A majority of those voting is necessary to approve the Agreement.

Subd. 2. If a tentative agreement is reached at a time when school is not in session, the president or an appropriate local officer available shall be authorized to call a meeting for the purpose of ratifying the proposed Agreement. A notice of the meeting shall be mailed to the membership within _____ days of the tentative agreement. The meeting shall be held no later than _____ days after the date of the notice. Included with the notice will be an outline of the negotiated changes in the Collective Bargaining Agreement.

Section 2. In the event that a Collective Bargaining Agreement cannot be reached between the local and the school district, the local shall conduct a strike vote at its discretion. Such strike vote shall be conducted at a general membership meeting called expressly for that purpose. The vote for a strike shall be by secret ballot. _____ (percentage*) of the membership must vote their approval of a strike action.

Section 3. If a general membership meeting has been called for the purpose of ratifying the Collective Bargaining Agreement and the Agreement is rejected as set forth in Section 1, the local may conduct a strike authorization vote, at this meeting, as set forth in Section 2.

Section 4. During a strike or in the event of an emergency, the executive board shall have the authority to establish alternative timelines for notification and balloting.

Note 4* The Education Minnesota Organizing for Settlement Fund Guidelines require that at least two-thirds (2/3) of the membership voting must authorize a strike action.

Article _____ Section 1.

Disciplinary Action

Disciplinary action, in the form of censure, suspension or permanent expulsion, shall not be taken against any member except for cause. Cause shall relate to conduct prejudicial to the purposes of the local, which may include any one or more of the following:

1. Failure to remain a member in good standing with Education Minnesota, the American Federation of Teachers and National Education Association.
2. Substantial violation of the Code of Ethics of the Board of Teaching or other licensing agency.
3. Violation of a local policy in a crisis, which affects the entire school district.
4. Other good and sufficient cause whereby the conduct of the member would be prejudicial to the purposes of the local.

Section 2. Such action shall be initiated by a complaint of a majority of the officers of the local, with written notice to the member of the proposed action to be taken and the reasons thereof. Such notice shall also include the statement that the member has ten (10) calendar days in which
to request a hearing before the local executive board, or a special local discipline committee, at
which the member is entitled to a representative of her/his choice to answer the charges and
examine those making them.

Section 3. The hearing will be private or public at the choice of the member being disciplined,
and the decision, by a simple majority, shall be communicated, in writing, to the member,
accompanied by a memorandum of findings of fact, within ten (10) days of the close of the
hearing. A tie vote shall indicate no action will be taken.

Section 4. Any member censured, suspended, or expelled under these provisions shall have the
right of appeal to the full membership or representative body, if applicable, within ten (10) days
of receipt of the decision. The appeal hearing shall be presided over by the local president
who shall establish a procedure, which includes witnesses and right of cross-examination. A quorum
shall be present. The decision shall be made by secret ballot with a simple majority of the
membership present and voting. In the case of a tie, with the president voting, no action shall be
taken.

Section 5. Communicate, in writing, the action to expel or suspend the President of Education
Minnesota.

Section 6. A member who is expelled or suspended from membership in the local, shall have the
right of appeal to the Education Minnesota Governing Board in accordance with such policies
and procedures as the Board may adopt.

Section 7. Appeal to the American Federation of Teachers and National Education Association
shall be governed by the policies and procedures adopted by the AFT and NEA.

Section 8. Lawsuits. No person shall initiate a civil action suit or proceeding in any court
against the local or any of its officers, members, or employees, on account of any discipline
unless such person has exhausted the remedies of hearing and appeal as provided in this
Constitution.

Amendments to the Constitution

Section 1. An amendment to this Constitution may be introduced at a meeting of the Executive
Committee/Board of Directors (or general membership meeting if a local does not have a
separate meeting for the Executive Committee/Board of Directors), and acted upon at a
subsequent membership meeting of the association.

Section 2. A copy of the proposed amendment, together with the recommendations of the Board
of Directors/Executive Committee, shall be made available to all members of the association two
weeks before such action is to be taken.

Section 3. A two-thirds (2/3) vote of those present and voting at a membership meeting is
required to adopt a proposed amendment.
**Education Minnesota Local Language for Bylaws**

**Powers of General Membership (dues, budget and membership)**

State and national dues will be assessed in accordance with the dues categories and policies of Education Minnesota, AFT and NEA.

Local membership dues shall be determined by the (Local Name) in the following manner:

*Insert local process and guidelines*

No net earnings shall inure to the benefit of any member (except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes as herein above stated) (required language by the Internal Revenue Service). *This means the union, as a tax exempt organization is serving exempt interests and not private interests.*

**Maintenance of Membership**

The Executive Board of (Local Name) shall adopt a policy to secure twelve-month membership commitments from each member, which will renew on an annual basis unless revoked during the month of September (1-30).

**Parliamentary Authority**

Parliamentary Authority, Section 1. Rules of Order: The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall govern [Local Name] in all cases to which they are applicable, and in which they are not inconsistent with the Constitution, Bylaws, or any Special Rules of Order that [Local Name] may adopt."

**Election of State and National Delegates**

The election of state and national delegates will be held in accordance with the timelines and procedures of the state and national organizations.

**Amendments to the Bylaws**

The Bylaws of this Constitution may be amended by a majority vote of those members present and voting at any membership meeting.
Role of Local Union Officers
**Officer Titles for Use by Education Minnesota**

With the merger of the Minnesota Education Association and the Minnesota Federation of Teachers into over 400 locals statewide, we identified a need for standardization of local officer titles for use by the state organization in order to avoid confusion and miscommunication. Therefore, Education Minnesota will use the titles in the right hand column below that are translations of what most locals use in a variety of ways. Your local is not expected to change officer titles to match what the state organization will have on its system. Just be aware that when a letter is addressed to the local Member Rights Contact, for example, that it goes to the local grievance or teacher rights chair. Thank you for your assistance.

<table>
<thead>
<tr>
<th>For Education Minnesota Records</th>
<th>Local Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>President</td>
</tr>
<tr>
<td>Vice President / President-Elect</td>
<td>Vice President / Co-President</td>
</tr>
<tr>
<td>Secretary</td>
<td>Secretary</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Treasurer</td>
</tr>
<tr>
<td>Membership Contact</td>
<td>Membership Chair</td>
</tr>
<tr>
<td>Building Contact</td>
<td>Building Representative / Steward / Work Site Representative</td>
</tr>
<tr>
<td>Building Representative</td>
<td>Building Representative / Steward / Work Site Representative</td>
</tr>
<tr>
<td>Educational Issues Contact</td>
<td>Instruction and Professional Development / Professional Issues</td>
</tr>
<tr>
<td>Worksite Action Leader (WAL)</td>
<td>Government Relations / Legislative Affairs / Political Action</td>
</tr>
<tr>
<td>Worksite Unity Leader (WUL)</td>
<td>Government Relations / Legislative Affairs / Political Action</td>
</tr>
<tr>
<td>Health Insurance Contact</td>
<td>Health Insurance Contact</td>
</tr>
<tr>
<td>Health Care Advocate (HCA)</td>
<td>Health Care Advocate</td>
</tr>
<tr>
<td>Local &amp; Community Action Team</td>
<td>Local &amp; Community Action Team</td>
</tr>
<tr>
<td>LCAT Organizer</td>
<td>LCAT Organizer</td>
</tr>
<tr>
<td>Member Rights Advocate</td>
<td>Member Rights / Teacher Rights / Grievance Chair</td>
</tr>
<tr>
<td>Negotiations Contact</td>
<td>Negotiations Chair / Lead Negotiator / Bargaining Chair</td>
</tr>
<tr>
<td>Communications Contact</td>
<td>Communications Chair / Newsletter Editor</td>
</tr>
</tbody>
</table>
MEMBER RESPONSE SHEET (Sample)

Name __________________________________________________________

Building _________________________________________________________

1.) What areas listed would you be comfortable assisting in?

2.) Do you have any areas of strength or interest not listed?

3.) What time during the day are you available for a short personal visit?

Thank you for your cooperation and have a great year!!!
OPPORTUNITIES FOR INVOLVEMENT IN YOUR LOCAL:

Officers:
- President
- Vice President
- Secretary
- Treasurer

Committee members and chairs in:
- Auditing
- Communications
- Elections
- Government Relations
- Member Rights
- Membership
- Negotiations
- Organizing
- Staff Development

Building Representatives
Health Care Advocate
Hospitality
Newsletter
Website Builders

ANY OTHER AREAS YOU WOULD LIKE TO ASSIST!
President

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Serve as executive officer of and official spokesperson for the local:
   a. To the membership
   b. To the administration
   c. To the community
   d. To the Intermediate Organization, Education Minnesota, AFT, NEA

2. Appoint committee chairs and make committee assignments per local constitution/bylaws. Delegate responsibility and hold chairs accountable for their duties.

3. Serve as ex-officio member of all committees.

4. Prepare for and conduct local meetings.

5. Listen to your members and refer them to the appropriate committee for needed assistance.

6. Involve the governance structure and total membership in the decision-making process.

7. In conjunction with your executive committee/board, develop goals to be completed during the year.

8. Be aware of pending grievances, status of negotiations and happenings in the district.

9. Appoint and serve on the Meet & Confer Committee as provided in your local constitution/bylaws.

10. Work with your treasurer to prepare and monitor a local budget. See that dues are forwarded and appropriate reports (for example, IRS) are filed.

11. Be accessible to members and their needs.

12. Know your Collective Bargaining Agreement.

13. Attend appropriate training/leadership conferences at the intermediate, state or national levels.

14. Work with the Member Rights Advocates in the local to establish a system to track and monitor grievances and grievance timelines.

15. Monitor the school district’s requests to the Professional Educator Licensing Standards Board (PELSB) regarding application for Tier 1 and 2 licenses and Out-of-Field Permissions. An Out-of-Field Permission requires the signature of the teacher; Check with members to make sure they understand that they have the opportunity to agree or not agree with the permission request. Also, please be vigilant in making sure districts are gathering member signatures (and their subsequent agreement to the assignment) on OFP permission applications. Districts have been known to forge member signatures, and they have been known to suggest to members that they can assign members out of licensure field however they wish. These applications should proceed only when members knowingly agree to them.
Vice President/President Elect

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Be prepared to act as president should the need arise.
2. Attend appropriate trainings, conferences/meetings in preparation to becoming president.
3. Act as the president’s designee when needed.
4. Prepare a schedule for attendance at school board meetings.
5. Serve as your local’s spokesperson and/or member of the Meet and Confer.
7. Chair the Constitution and Bylaws Committee.
8. Serve as a member of the President’s Advisory Council/Cabinet/Executive Committee.
9. Assist in recruiting, training, and orienting building representatives.
10. Attend appropriate meetings and training sessions.
Secretary

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Assist the president in preparing the agenda for meetings.
2. Distribute or post notices of meetings.
3. Keep a permanent record of minutes from meetings and of any correspondence received or sent.
4. Maintain the local’s archives with the Constitution and Bylaws, past and present officers, committee structures, etc.
5. Assist in the preparation and distribution of the local’s policy handbook, and of the member’s handbook about the local.
6. Serve as a member of the President’s Advisory Council/Cabinet/Executive Committee.
7. Attend appropriate meetings and training sessions.
Treasurer

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Receive, protect and care for, and disburse all funds of the local and keep an account of the same.

2. Assist in preparing a budget for the local, and serve as financial advisor to the local.

3. Prepare and submit monthly and annual financial reports to the local.

4. Verify accuracy of payroll deduction of dues with the local membership chairperson.

5. Forward payment of dues to Education Minnesota.

6. Have financial records audited each year and submitted to the Education Minnesota Financial Department.

7. Annually submit your 990 Form to the IRS.

8. Serve as a member of the President’s Advisory Council/Cabinet/Executive Council.

9. Attend appropriate meetings and training sessions.
Membership Contact

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Ensure the accuracy of membership roster.

2. Reconcile rosters with district and payroll data every pay period. In most locals, this duty is made easier by working with the treasurer.

3. Finalize membership applications and submit to your assigned Education Minnesota field office.

4. Keep up with personnel changes throughout the year and submit changes to your payroll department and your assigned Education Minnesota field office.

5. Welcome new hires to the district that includes a personal handwritten greeting.

6. Recruit/assign colleagues to serve as union mentors to the new hires.

7. See that new hires receive information about the union, and are personally asked to become a member.

8. See that new hires learn about the community and the district.

9. Work with the human resources/business office for the district to receive notice of new hires throughout the year, and see that new hires are asked to become members.

10. Order membership materials from Education Minnesota in the spring and oversee distribution to the members.

11. Maintain membership rosters for the local and Education Minnesota and report additions, deletions, and changes on a regular basis.

12. Work with the local treasurer to certify the correct dues amount to be forwarded to Education Minnesota.
13. Contact potential members annually to recruit them as members.

14. Coordinate the development and implementation of programs for new hires.

15. Serve on the President’s Advisory Council/Cabinet/Executive Council.

16. Attend appropriate meetings and training sessions (intermediate organization/state).

**Membership Team**

**Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)**

1. Assist the local membership contact to establish a plan for your local that demonstrates a sense of welcome to new hires.

2. Be a contact to new hires personally welcoming them to the union and the district.

3. Help new hires complete the various forms required by the school district.

4. Keep records for your building as to changes in membership and report them to the membership contact.

5. Assist in the planning and implementation of activities to support new hires during their first years of employment.
Building Contact/Representative

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)


2. Recruit new members to the local. Assist new members in becoming familiar with their school district and local. Promote 100% membership from your building.

3. Assist the membership contact in verifying correct names, addresses, and phone numbers of members.

4. Serve as the main source of communication to the members in your building or department.

5. Display appropriate union materials on bulletin boards.

6. Develop a personal contact system for your building, and serve as the initiator of any “messages” sent through the system.

7. Distribute appropriate communications in your building.

8. Advise the president of concerns in your building.

9. Assist members in receiving help they may need for member rights, membership concerns, etc.

10. Help identify members who will serve on committees.

11. Represent your building at meetings of the President’s Advisory Council/Cabinet/Executive Committee.

12. Attend appropriate meetings and training sessions.
Educational Issues Contact

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Monitor compliance of state regulations and rules in the local school district.

2. Monitor and take part in district activities to implement standards, testing, and accountability mandates.

3. Become a member of the local Staff Development Committee, direct its work to be of assistance to members and in compliance with the statute, based on research.

4. Monitor and support the local Continuing Education Committee.

5. Assist the negotiations team with research information on professional issues (class size; prep time; staff development; mentoring; granting lane change credits for local in-service training).

6. Identify a key issue for the year and organize around this issue.

7. Assist with American Education Week and Read Across America activities.

8. Serve as a member of the President’s Advisory Council/Cabinet/Executive Council.

9. Attend appropriate meetings and training sessions.
Worksite Action Leader (WAL)
Worksite Unity Leader (WUL)

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Implement and coordinate lobbying efforts (letter writing, phone calls, and personal meetings with legislators).

2. Campaign for candidates who are friends to education.

3. Promote involvement in screening of political candidates and actively seek members for screening committees.

4. Promote involvement in political party caucuses.

5. Inform membership of the actions of the Legislature.

6. Attend Lobby Day activities at State Capitol.

7. Serve on the President’s Advisory Council/Cabinet/Executive Council.

8. Attend appropriate meetings and training sessions.

9. Conduct fundraising for political action.
Health Care Advocate (HCA)

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Attend HCA trainings in your area.

2. Commit to reading updates, communicating regularly with Field Staff and staying up to date on the issue.

3. Communicate with members in your local.
   a. Coordinate organizing activities (letter-writing campaigns, phone banks, sending postcards, etc.)
   b. Coordinate member attendance at regional meetings and lobbying efforts (Eggs and Issues, Pizza & Politics, Lobby Day, etc.)

4. Coordinate member activities.

5. Meet with your legislators and serve as a local point person if the legislator has a question about a health insurance bill.
Local & Community Action Team (LCAT)

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Communication – create a plan to get information to members and the public.

2. Negotiations – develop tactics specific to negotiation goals.

3. Member Mobilization – plan and create tactics to get people involved.

4. Community Engagement – educating and including community members in the matters of mutual interest.
Member Rights Advocate

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Act as a “problem solver” for your district. If necessary, process formal grievances through whatever steps needed to get problems solved.

2. Keep members informed of their rights and responsibilities through present Collective Bargaining Agreement language, current statutes, and the Code of Ethics.

3. Police the Collective Bargaining Agreement through familiarization with current language, and note where problems may occur and where new or revised language is needed. Work closely with local negotiators.

4. Become involved with the negotiations process by either attending negotiations sessions or the planning sessions for proposed Collective Bargaining Agreement language.

5. Serve as a representative with members at disciplinary meetings with administrators or any other times as needed/requested.

6. Serve on the Meet and Confer Committee (this may vary per local).

7. Serve as a member of the President’s Advisory Council/Cabinet/Executive Committee.

8. Attend appropriate meetings and training sessions.
Negotiations Contact and Team

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Be knowledgeable about the district’s financial status.

2. Request and receive copies of all employer financial records available to the local.

3. Survey the membership regarding their needs/interests for Collective Bargaining Agreement proposals.

4. Return the survey results to the membership for refinement, and develop the initial proposal for presentation on behalf of the bargaining unit.

5. Regularly report the status of negotiations to the membership and to your field staff.

6. Assist the member rights chairperson in the interpretation of Collective Bargaining Agreement language.

7. Serve on the Meet and Confer Committee (this may vary per local).

8. Serve as a member of the President’s Advisory Council/Cabinet/Executive Committee.

9. Attend appropriate meetings and training sessions.

10. Complete Education Minnesota’s Settlement Report form and send it to your field staff within thirty (30) days of ratification.
Communications Contact

Suggested Responsibilities/Duties (refer to your local Constitution and Bylaws)

1. Publish local newsletter or electronic messages for members.

2. Prepare a local staff directory.

3. Establish contact with local media.

4. Assist in the preparation of American Education Week and National Education Professional activities.

5. Assist in the preparation of recognitions for colleagues and members of the public (if determined as an activity of the local).


7. Attend appropriate meetings and training sessions.
of

Belonging
# Planning Guide to Build Local Capacity

<table>
<thead>
<tr>
<th>Step 1: Select Strategy(ies)</th>
<th>Step 2: Set Some Benchmarks</th>
<th>Step 3: Select Tactics (3-5 at most)</th>
<th>Step 4: Identify Leads</th>
<th>Step 5: Select Preferred Tracking Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retain Members</td>
<td>X percent of members renewed</td>
<td>1:1 conversations</td>
<td>Members</td>
<td>NSA360</td>
</tr>
<tr>
<td></td>
<td>Less than X percent potential members</td>
<td>Events</td>
<td>Members, and request EdWIN staff support</td>
<td>Google RemotDoc</td>
</tr>
<tr>
<td></td>
<td>Other: ______________________</td>
<td>10-minute meetings</td>
<td>Other: ______________</td>
<td>Other: ______________________________</td>
</tr>
</tbody>
</table>

| Recruit New Members         | Convert X percent of potential members to members | 1:1 conversations                    | Members              | NSA360                                 |
|                            | X percent of new hires join as members | Events                               | Members, and request EdWIN staff support | Google RemotDoc                         |
|                            | Other: ______________________ | 10-minute meetings                   | Other: ______________ | Other: ______________________________  |

| Engage Current Members      | Follow up with X percent of members about their specific interests | 1:1 conversations                    | Members              | NSA360                                 |
|                            | Impact: X percent of members are not engaged | Events                               | Members, and request EdWIN staff support | Google RemotDoc                         |
|                            | Increase member attendance at meetings by X percent | 10-minute meetings                   | Other: ______________ | Other: ______________________________  |
|                            | Provide X professional development opportunities | Trainings                           | Other: ______________ | Other: ______________________________  |

| Develop New Leaders         | Increase the building rep/member ratio by X | 1:1 conversations                    | Members              | NSA360                                 |
|                            | Ensure events have X trained member rights advocates | Events                               | Members, and request EdWIN staff support | Google RemotDoc                         |
|                            | Establish 1-2 committees that reflect member interests | 10-minute meetings                   | Other: ______________ | Other: ______________________________  |
|                            | Other: ______________________ | Trainings                           | Other: ______________ | Other: ______________________________  |

| Regain Lost Members         | Conduct "oil" interview with every member that drops | 1:1 conversations                    | Members              | NSA360                                 |
|                            | Other: ______________________ | Direct mail                         | Members, and request EdWIN staff support | Google RemotDoc                         |
|                            | Other: ______________________ | Unavailable in every workplace       | Other: ______________ | Other: ______________________________  |

Based on selections made in this document, Education Minnesota will provide your local with tailored support and resources.
Communicating

With Members
Communicating with Members

Whatever method is used, develop and maintain contact records. Use this information to connect with members, to make sure that all members are contacted (not just a few), and to recognize members who volunteer their time and talents.

E-Mail Distribution Lists

Get in the habit of forwarding all e-mail promptly to the appropriate group. Use the lists to communicate internally. Try to use a certain color or font to identify messages from the local.

- Executive Board
- General Membership
- Settlement & Organizing Committee
- Negotiators
- Member Rights
- Government Relations
- Educational Issues/Professional Development
- Use Personal E-Mail, Texting or Web (Hustle, etc.)

NOTE: The president does not and should not have to do this alone. Delegate contacts to faculty or building reps or to members who share an interest.
“NO ONE TOLD ME…”

Keeping in touch with your membership is one of the most critical activities any President will undertake. However, this can be accomplished in very simple ways . . .

1. Use bulletin boards to post meeting notices, minutes of meetings, the names of local leaders and a copy of the Collective Bargaining Agreement. A great idea is to have colored lights draped around the board, and have the lights turned on when posting something new.

2. Conduct short building meetings (see examples in this book) to gather an opinion on an issue or inform the members of an important issue.

3. Newsletters can provide opportunities for a lengthier report on an issue, as well as material that can be saved for future reference. A one-page front-to-back newsletter is plenty.

4. By far the most effective means of communication is through the personal contact system. Opinion leaders within buildings or departments are identified by their colleagues. They in turn, are asked to “adopt” 4-5 of their colleagues to visit with throughout the year. They leave information, conduct surveys, welcome new members, collect opinions on issues, and listen to concerns of the members. They then provide data to the building/faculty representative for discussion at governance meetings. The value of this system is that many more members become involved in the organization, and it gives the building representatives assistance in meeting the needs of all the members. A further explanation of this system is included elsewhere in this section.

5. Use of technology for sending messages or receiving information is becoming the quickest means of communication. Individual locals are able to develop their own local Web sites at no cost using the Education Minnesota’s content management system. Contact your field staff for information on how this can be done.
INTERNET AND E-MAIL IN THE SCHOOLS

– or – Double-Click Where?

PRIVACY

- Do not expect either Internet or e-mail messages to be private.
- Employer “owns” the system - ownership = control.
- Even if you designate a message as “confidential” or “private,” do not expect privacy.
- Best option – avoid sending confidential or private messages over the Internet or through e-mail.
- Even deleted messages are retrievable.
- Messages are discoverable in litigation (including deleted messages).

INTERCEPTING MESSAGES

- Both federal and state wiretapping acts prohibit the interception of messages.
- Laws apply to message systems that use phone lines (e-mail, Internet and voice mail).
- Laws do not apply if system is completely in-house (self-contained). Again, test whether system uses phone lines.
- Where wiretapping laws do not apply, system owner sets the rules.
- Laws do not apply to pagers.
- Again, data is recoverable on computers even after “deletion” from hard drive.

POLICIES

- Internet and e-mail use viewed as privilege, not a right. District has the right to restrict or prohibit access at any time or for any reason. Typical restrictions prohibit inappropriate or unlawful use, and personal use.
- Internet service providers may assert restrictions, which require districts to have each employee sign a contract agreeing to access conditions. Some districts may independently impose restrictions through policies governing staff and student use of Internet and e-mail.
Conditions from either service providers or districts typically prohibit unlawful, improper, or inappropriate use. Examples of prohibited use include:

- Invasion of privacy
- Sexual harassment
- Viewing or transmitting language, material, or images that are defamatory, pornographic or obscene
- Copyright infringement
- “Overloading” the Network
- Personal use - if personal use is prohibited by employer

Conditions sometimes include assumption of risk for inappropriate student use. Watch for this. Work towards “reasonable supervision” standard. Being responsible for all student use of Internet at all times and in all places is not reasonable. Students should be held independently responsible for Internet access and use.

District has the right to pass and implement a policy governing Internet and e-mail use. The exclusive rep has the right to bargain over the effects of implementing the policy. The right to bargain triggered by policy language that says, “you-can-be-disciplined-for-violating-this-policy.” Bargaining is over “how”, “when” and “for what”, discipline be imposed.

Make sure discipline provisions are consistent with law and the Collective Bargaining Agreement.

**UNION USE**

- Union has right to use mail system, whether snail or instant. What agreement does union have on use of in-house mail system for union business? Same policy or agreement applies to union use of e-mail, voice mail, and Internet.
It has been proven, time and time again that the most effective internal communication system component is personal contact. It is not a stand-alone system. Use other internal communication components to support the contacts.

A. To establish the system, consideration needs to be given to several items:

1) Select contact people you can count on - people members respect.
2) Include opinion leaders as contact people.
3) Try to restrict the number of contacts a person will make to five or six people maximum.
4) Contact people should be located in every building.
5) Make certain that the special interest groups are covered. (You may wish to establish specific contact people for these groups.)

B. The regularity of the contacts made is determined by the situation in which it is being used. In a crisis (achieving a settlement and/or a potential strike), it is recommended that a contact be made once a week.

C. Each contact person should personally talk to each person on their list. Always establish a deadline for each contact.

D. The first contact should involve a reasonably low-key issue or event in order to place the contact person at ease and to establish some rapport between the contact person and the individual being contacted.

E. When making the contact, it is generally best to meet in a setting where there are not a lot of people around.

F. The contact person should briefly explain the issue or item and then become a listener.

G. The success of this system is based on letting people know we want them informed, that we care about them and most importantly, that we want their comments and questions.
Building Contact System

Building: ____________________________________________

**Building Team**

Building Representative or Building Coordinator: ____________________________________________

Team Member: ____________________________________________

Will contact: ____________________________________________

________________________________________

Team Member: ____________________________________________

Will contact: ____________________________________________

________________________________________

Team Member: ____________________________________________

Will contact: ____________________________________________

________________________________________

Team Member: ____________________________________________

Will contact: ____________________________________________

________________________________________
Suggestions for Local Meetings

1. Meet regularly
   - Publish the dates, times and places
   - Vary the times and places to accommodate members
   - Consider door prizes and/or food as incentives
   - Help members feel it is worth their time to attend

2. Prepare and distribute an agenda in advance of meetings
   - Include any committee reports
   - Consider using e-mail
   - Be clear in what the meeting is to accomplish

3. Executive Committee or Board meet one week prior to the general meeting
   - Set the agenda
   - Address issues
   - Plan the meeting
   - Gather reports

4. Include special outside speakers and programs
   - Retirement issues
   - Grievance issues
   - Collective Bargaining Agreement maintenance issues
   - Member ethics
   - Timely topics
   - Entertainment
   - Member benefits (ESI)

5. Follow Robert’s Rules of Order Newly Revised

6. Get Minutes out in a timely manner
IDEAS for Standards and Norms

Meeting Standards and Norms
1. For new topics, try to provide some background information prior to meetings.
2. The Agenda
   - The agenda should identify discussion and action items.
   - Agenda items will have a brief introduction and history when possible.
   - Submit agenda items ahead of time (if possible or practical).
   - Formally establish an agenda at the beginning of a meeting.
   - Conclude meeting with opportunity to suggest agenda items for next meeting.
3. Convener should review agenda topics and identify the decision-making points prior to discussion and action.
4. Allow enough time in the agenda so there is flexibility to fully explore issues and use available time efficiently.
5. Assure that everyone has the opportunity to be heard.
6. On a regular basis, reflect on the group’s adherence to Standards and Norms.
7. Send Minutes in a timely fashion to members.

Individual Standards and Norms
1. Come prepared.
   - Read all materials.
   - Gather needed information.
   - Attend meetings.
   - Bring all materials.
2. Arrive on time, and stay for entire meeting.
3. Display honest, respectful and straightforward attitude when addressing issues.
4. Listen to what others say.
5. Focus on the issues, not people.
6. Support actions and decisions of the group.
7. Seek solutions through problem solving.
8. Promote your organization.
9. Respect the recommendations of reporting committees, but ask the questions that need to be asked in order to make informed decisions.
10. Participate in committees.
11. Communicate with local leaders and members.
12. Honor confidentiality.
13. Continue to learn and stay current on union issues.

Group Standards and Norms
1. Recognize role of delegate and trustee (fiduciary responsibility).
2. Work to resolve differences to arrive at solutions.
3. Focus on issues; stay on task.
4. Respect Standards and Norms.
5. Use parliamentary procedures appropriately.
6. Take time to play and team build.
7. Admit mistakes and learn to grow from them.
8. Exchange feedback on meeting format when needed.
9. Discuss concerns on process in a timely and appropriate manner.
Sample Guide for Planning a Meeting Agenda

Name of Local
Date
Location/Time

Agenda

1. Call to Order
2. Approval of Minutes
3. Adoption of Agenda
4. Reports of Officers
5. Reports of Committees
6. Unfinished Business
7. New Business
8. Announcements
9. Adjourn

Agenda items may be added where necessary. Refer to parliamentary procedures for local presidents for details on conducting a meeting.

NOTE: An agenda listing committee reports, and pending and special order business, should be compiled before the meeting and publicized widely when possible.
Do your members complain they are too busy to come to a local meeting?

Use this alternative:

- Try promising a “10-Minute” building meeting . . . timed by the clock!

  Distribute an announcement that calls attention to the 10-Minute limit.
  It could include comments such as:
  “10 Minutes! You don’t believe it?? Then bring along your stopwatch!!!”
  “We begin at (time) sharp!”
  “We meet at (place).”

- The agenda might look like this . . .

  2 MINUTES . . . What was discussed at (insert name of governing body)
  Negotiations update . . .

  4 MINUTES . . . We need your opinion on . . .

  Your views will be presented at the next (insert name of the local governing body such as executive committee/board) meeting.

  3 MINUTES . . . Latest developments on the problem of . . .
  This is what needs to be done . . .
  This is what (the local) would like you to do . . .

  1 MINUTE . . . A local victory you should be proud of . . .

- Closing

  “Time is up! We told you we could do it in 10 minutes!!! Don’t forget to leave your questions or suggestions at the door. Thanks for coming and for supporting the local.”
IDEAS for 10-15 Minute Monthly Meetings

**August**
1. Handout list of officers, building reps & their contact information (phone numbers, emails and prep time)
2. Get list of Member Rights Advocates to staff – names, contact information
3. What is your duty free lunch? How much time do you get?
4. 403b start now – talk to financial planner & continue when district matches
5. Building unwritten rules or cultural things newbies should know about
6. Who to talk to about insurance questions or issues – their contact information

**September**
1. How to get a sub
2. How to get paid if you sub for someone
3. Learn how to read your check stub and review it every time you get paid
4. How to access sick leave, how to keep track of how many days you have used and what’s left
5. Social Media

**October**
1. How to get paid for coaching or working sporting or other events
2. Parent/Teacher Conferences – How does it work in your building/grade level/subject area?
3. How to access personal leave
4. When do observations happen? How many should I have?

**November**
1. How to get prior approval for credits and lane changes
2. Staff Development – How to access the funds
3. Information on your schools TDE plan
4. Snow day policy
**December**
1. Bereavement Leave
2. Child Care Leave
3. Maternity Leave

**January**
1. Continuing Education Committee (CEU) – whose on it, when do they meet, what paperwork needs to be completed
2. Licensure renewal

**February**
1. Lay-off and Recall information
2. When to Resign or send in Retirement letter
3. Investigations – BOT, MDE, District, Police – what to do,
4. Vacancies, Transfers, Reassignments

**March**
1. Unemployment
2. Check personnel file
3. What do you do if you find information in your personnel file you were not aware of?

**April**
1. Take some time in April to revisit topics from the year, which need more attention.

**May**
1. Summer contact information.
2. Summer pay.
3. Summer work for the school district (summer school, curriculum work, staff meetings, etc….)
4. Earning additional credits over the summer.
5. Next year’s calendar and workshop days.
6. Reminder of licensure renewal; license may expire July 1. Check your license.
Parliamentary Procedures

The following are some parliamentary procedures, which are essential in conducting a meeting. More detailed rules can be found in Robert’s Rules Newly Revised.

Order of Business

Every meeting should be controlled by an Order of Business. It may be whatever the Union itself determines or whatever the properly authorized officers may designate.

Normally, it should include:

1. **Call to Order**: by the President (or Chair)

2. **Reading and Approval of the Minutes**:
   - can be presented orally or in written form
   - corrections should be called for
   - motion is needed for approval

3. **Reports**: by officers and committees
   - can be oral or written
   - no motion is needed to adopt treasurer’s report unless it is audited
   - no motion is needed to adopt committee reports unless recommendations for action are made

4. **Old Business**: unfinished business from last meeting is brought to floor for action.
   - motion is required to adopt

5. **New Business**: any items not previously up for action

6. **Announcements**:
   - oral or written

7. **Adjournment**:
   - president automatically adjourns meeting at end of agenda
   - a motion can be made to adjourn before business is concluded but it must be voted on
Robert’s Rules of Order Motions Chart
Based on Robert’s Rules of Order Newly Revised (10th Edition)

The motions below are listed in order of precedence. A motion can be introduced if it is higher on the chart than the pending motion.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>§21</td>
<td>Close meeting</td>
<td>I move to adjourn</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§20</td>
<td>Take break</td>
<td>I move to recess for . . .</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§19</td>
<td>Register complaint</td>
<td>I rise to a question of privilege</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§18</td>
<td>Make follow agenda</td>
<td>I call for the orders of the day</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§17</td>
<td>Lay aside temporarily</td>
<td>I move to lay the question on the table</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§16</td>
<td>Close debate</td>
<td>I move the previous question</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§15</td>
<td>Limit or extend debate</td>
<td>I move that debate be limited to . . .</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>2/3</td>
</tr>
<tr>
<td>§14</td>
<td>Postpone to a certain time</td>
<td>I move to postpone the motion to . . .</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§13</td>
<td>Refer to committee</td>
<td>I move to refer the motion to . . .</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§12</td>
<td>Modify wording of motion</td>
<td>I move to amend the motion by . . .</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§11</td>
<td>Kill main motion</td>
<td>I move that the motion be postponed indefinitely</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§10</td>
<td>Bring business before assembly (a main motion)</td>
<td>I move that (or “to”) . . .</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
</tbody>
</table>

Please see the links below for information regarding Robert’s Rules of Order:

http://robertsrulesmadesimple.com/rrms_blog#.U8Ql5fso5jo

http://www.youtube.com/watch?v=Tqs-RcphzdA
**Incidental Motions** – no order of precedence. Arise incidentally and are decided immediately.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>§23</td>
<td>Enforce rules</td>
<td>Point of Order</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§24</td>
<td>Submit matter to assembly</td>
<td>I appeal from the decision of the chair</td>
<td>Yes</td>
<td>Yes</td>
<td>Varies</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§25</td>
<td>Suspend rules</td>
<td>I move to suspend the rules</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§26</td>
<td>Avoid main motion altogether</td>
<td>I object to the consideration of the question</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>§27</td>
<td>Divide motion</td>
<td>I move to divide the question</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>§29</td>
<td>Demand a rising vote</td>
<td>Division</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§33</td>
<td>Parliamentary law question</td>
<td>Parliamentary inquiry</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>§33</td>
<td>Request for information</td>
<td>Point of information</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
</tbody>
</table>

Jim Slaughter, Certified Professional Parliamentarian/Professional Registered Parliamentarian  
P.O. Box 41027  
Greensboro, NC 27404  
Phone: 336-378-1899  
E-mail: jim@jimslaughter.com Website: www.jimslaughter.com

**Motions that bring a question again before the Assembly**  
No order of precedence. Introduce only when nothing else is pending.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>§34</td>
<td>Take matter from table</td>
<td>I move to take from the table . . .</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>§35</td>
<td>Cancel previous action</td>
<td>I move to rescind . . .</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>2/3 or Majority w/notice</td>
</tr>
<tr>
<td>§37</td>
<td>Reconsider motion</td>
<td>I move to reconsider . . .</td>
<td>No</td>
<td>Yes</td>
<td>Varies</td>
<td>No</td>
<td>Majority</td>
</tr>
</tbody>
</table>

Jim Slaughter, Certified Professional Parliamentarian/Professional Registered Parliamentarian  
P.O. Box 41027  
Greensboro, NC 27404  
Phone: 336-378-1899  
E-mail: jim@jimslaughter.com Website: www.jimslaughter.com
Online Community

Education Minnesota’s Website
www.educationminnesota.org

Education Minnesota’s Website is a valuable resource to you as a local leader. We’ve recently updated the homepage navigation and added sections to help you find the content you need faster and more efficiently.

A section for local leaders
Log in with your username and password to go to the “Local Leaders” section in the left navigation bar, or search under Advocacy > Union U. You’ll find news, resources and publications such as the president and treasurer’s handbooks to support you in your vital role as local president.

The ability to create your own local Web site
Your local can create its own website for free, with access to all of the tools you need to build a vibrant, valuable site for your local members. You can even limit access to some content to just local members or leaders.

This is your chance to communicate directly to your members and the public 24/7. Contact your Education Minnesota field staff for details.
Up-to-date news from Education Minnesota
E-newsletters, such as the Presidents Insider and Capitol Connection, keep you informed about the union and education news that affects you.

Check out the news section on our website for the latest organizational information plus daily education headlines and more:  http://www.educationminnesota.org/news

Let us know how we can improve!
We want our website to be your first stop when you need information about Minnesota public education. Your ideas and suggestions will help us improve our content, so be sure to let us know how we’re doing. Email our Webmaster at webmaster@edmn.org with your comments.

How to Sign In/Register
Go to webpage: http://www.educationminnesota.org

Click on “Member Sign In” in the upper right corner.

The following page will appear giving you the option to sign in or register:
Social Media
We are constantly expanding our presence on social media as more and more members use these networks to connect with their union and get news and updates.

Follow us:

Facebook: https://www.facebook.com/EducationMinnesota
Flickr: https://www.flickr.com/photos/educationminnesota
Instagram: https://instagram.com/educationminnesota
LinkedIn: https://www.linkedin.com/company/education-minnesota
Pinterest: https://www.pinterest.com/educationmn
Snapchat: search for educationmn
Twitter: https://twitter.com/EducationMN
YouTube: https://www.youtube.com/user/EducationMinnesota

Contact your field staff if your local is interested in starting a Facebook, Twitter or other social media account!

Text Alerts
Text the word “education” to 877-877 for up-to-the-minute, members-only mobile alerts from Education Minnesota on everything from legislation to upcoming events and training opportunities. We do not send more than three alerts per month.

New – Hustle
Hustle is a FREE peer-to-peer texting tool available through Education Minnesota that enables you to easily have hundreds or even thousands of personalized 1:1 conversations with your members and supporters over text.

Hustle can help locals:
• Send many personalized text messages quickly and efficiently
• Encourage real conversations with members
• Reach more contacts faster than with phone banking
• Increase attendance at events, organize volunteers and much more all in one place
• Eliminates any numbers that are not true cell number.
• Gives individual members the ability to opt out of the HUSTLE app. If they do this, then they will not receive any HUSTLE text messages within the EDMN system.

Contact your field staff if your local is interested in setting up a Hustle account!
External Communications

If contacted by Media . . . contact your field staff ASAP for advice.

Responding to negative or one-sided articles, editorials and letters to the editor:

- Contact the reporter or editorial writer and politely point out that important information or points of view were omitted. Ask for a correction or clarification if warranted. Don’t argue – just present your case and ask for fair and balanced treatment. Ask to meet with the journalist in person to discuss the union’s side of the story and begin building a long-term relationship.

- Submit a letter to the editor. Avoid a point-by-point rebuttal to an article or letter – you’ll just restate the negatives. Instead, correct a few of the worst misstatements, but use most of the letter to outline the messages you want the community to hear. You can also ask to submit a longer counterpoint piece. Write clearly and succinctly; avoid sarcasm and counterattacks.

- If these measures don’t work, contact the editor, the publisher or owner, or the news director. Be polite but firm in your request for fair and balanced treatment. If the problem IS the editor or owner, and he or she refuses to listen, contact your field staff for further advice.
Support for New Members

Without the support of the membership, a local would only exist on paper. As many of our veteran members/leaders are retiring, or changing careers, the newest members in our locals will become the leaders of tomorrow. We continue to learn about the needs and interests of our newest members, and it becomes the responsibility of the local to understand them rather than their responsibility to fit into the local.

In this section are several ideas on how locals can develop programs/activities to assist the new members in becoming comfortable with the local.
President’s Check List for New Hires

Every new member should have information on:

1. Check-in the first month with new hires that they have received information about:
   - Your Local
     - Who to contact for assistance at the site level and the local level
     - How do you access information when you need it?
     - Invite them to social events or other meetings
   - Your District
     - Mandatory Reporting Act
     - Local Reporting Procedures
     - District Policy Manual
   - Minnesota State Policies
     - Minnesota Government Data Act
     - Minnesota Statute on Freedom of Harassment
     - Mandatory Reporting Act
     - Code of Ethics for Teachers or Support Staff

2. Licensure considerations (see Tiered Licensure infographic on page 69)
   - Talk with all new tier 1 and tier 2 teachers about their next step toward Tier 4 licensure.
   - The Education Minnesota Collaboration Lab document on page 70 has information for continued training.

3. Communicate with new hires in multiple ways and give opportunities to hear from them.

For more information & ideas, please see the New Hire Orientation and Recruitment Process handbook in the handbook section of this Presidents Manual.
Education Minnesota Foundation for Excellence in Teaching and Learning

Mission: Promoting vision, best practice and achievement

The Education Minnesota Foundation for Excellence in Teaching and Learning offers grants and scholarships of up to $15,000 in four categories: Classroom-focused, professional development, IMPACT grants and National Board Certified Teacher scholarship. Through the Collaboration Lab, the Education Minnesota Foundation works with a district’s administration and staff to build positive relationships between staff and management.

Since 1992, the Education Minnesota Foundation has awarded thousands of grants totaling more than $4.5 million to educators and nonprofit organizations that work to improve public education in Minnesota.

Eligibility
Active members of Education Minnesota who did not request a refund of the annual $5 assessment fee for the Foundation are eligible to apply for grants and scholarships. To become an active member, please contact the Education Minnesota membership department at 651-227-9541.

How the Foundation works
All grant applications are reviewed by the Board of Trustees of the Foundation—teachers and support professionals who are members of Education Minnesota. Applicants hear from the Foundation whether their proposal is approved or denied via email or postal mail within two months of the application deadline.

Why should I apply for an Education Minnesota Foundation grant?
The most important reason to apply for a Foundation grant is to utilize a benefit offered by your union. After all—your dues dollars make Foundation grants possible!

Other reasons to apply for a Foundation grant:
- Explore innovative ideas for students without having to pay for it
- Network with other grantees
- Gain grant-writing experience and training
- Become a better educator for your students
- Applying is easy!

To learn about applying for grants, scholarships or participating in the Collaboration Lab, go to www.edmnfoundation.org
Education Minnesota Foundation for Excellence in Teaching and Learning Collaboration Lab

Through the Collaboration Lab, the Education Minnesota Foundation will work with a district's administration and staff to build positive relationships between staff and management to:

- Create systems and structures that support collaboration, deepen understanding of stakeholders, and provide honest feedback that can lead to better outcomes for a specific project.
- Support sustainability of these systems and structures so that there is collaboration that takes place regardless of the personalities of specific individuals in leadership.
- Reach positive outcomes on a shared goal, project or objective.

Education Minnesota believes that how the staff-management group achieves their shared goal will be just as important as achieving it; process weighing equally with product. Our theory of change is that a better process will lead to a better product.

For districts that desire single-day professional development or collaborative opportunities, the foundation will work directly with stakeholders from staff and management to design these opportunities if they are related to:

- Racial Equity – FIRE (Facing Inequities and Racism in Education) collaboration.
- Relationship building around Teacher Development and Evaluation or specific building issues.
The basis for this new professional development opportunity started in three pilot local unions, who attended the Teacher Union Reform Network (TURN) Conference to start work on a labor-management project of their choosing.

Mounds View Education Association

The Mounds View Education Association considers itself lucky to have a pretty good relationship with school district management, said Stacey Vanderport, MVEA local president.

“We had systems and structures in place for many years,” said Vanderport. “We created a joint task force once the teacher development and evaluation law came to be and with Co-Comp. But we looked at the systems that we have and wanted to make sure all of the pieces were connected.”

Deer River Education Association

Deanna Hron, the president of the Deer River Education Association, was interested in bringing the full-service community school model to her district when she was asked if she and the district would like to pilot the labor-management collaboration project.

“We’ve been able to build a bridge between us and be proactive about things,” she said. “It feels like we have a different relationship, a collaborative relationship. And it’s stretching to other things we’ve worked on, like talking about professional development.”

Chaska Education Association

Collaboration has been a value in the Eastern Carver County School District since a teacher strike in 1984, but Chaska Education Association President Chris Commers knew there was still room for improvement.

“What’s a great need for the local and how can it be framed so the district can see its self-interest?” he said.

Districts will be charged a $1,000 base partnership fee that will be a charitable donation to the foundation. This fee will get districts:

- Facilitation at four meetings for a one-year-long project, including all of the tools for collaboration to make that project; OR
- One full professional development day including all trainers; OR
- Two half-day professional development sessions including all trainers.

More information about the collaboration lab can be found at edmnfoundation.org/collaboration-lab.
One of the most frequently asked questions by local presidents is, “How do I activate the members in my local?” The motivation of members to become involved in their local, state and national organizations is based on, how they are encouraged to become active and how they are appreciated for their contributions. Most members who become involved within their locals continue their participation in the union by attending activities sponsored by the intermediate, state or national organizations.

In this section are:

1. Suggestions on how to recruit and motivate volunteers.
2. Guidelines for organizing effective volunteer committees.
3. Suggestions on how teacher and Educational Support Professionals (ESP) members can work together for the benefit of all.
4. Suggestions for year round activities that will encourage the involvement of members.
Volunteer: A person who enters or offers to enter into any service of her/his own free will.

Recruiting and motivating volunteers and maintaining the volunteer program is essential to the success of your local. The following is a checklist, which may be helpful to you as you work with volunteers.

To succeed in the recruitment of volunteers, remember the following key factors:

✔ PLAN THOROUGHLY!
- Determine the jobs and activities for which volunteers are needed.
- Outline the responsibilities and timelines for each job and activity.
- Select volunteer recruiters and a recruitment method.
- Prepare record-keeping pieces for the Local.

✔ RECRUIT ENTHUSIASTICALLY!
- Personal contact is the key to successful recruitment.
- Allow adequate time to recruit.
- Be positive.
- Be prepared to answer questions and deal with potential concerns/problems.
- If at first you don’t succeed, be sure to try again. A “no” doesn’t mean a person is unwilling to help!
- Review your local’s records for past activists’ names.

✔ TO SEE THE SUCCESSFUL COMPLETION OF VOLUNTEER JOBS AND ACTIVITIES:
- Develop timelines, deadlines and a program calendar.
- Provide appropriate training for volunteers.
- Keep them informed.
- Monitor volunteers’ activities with one of the following:
  - Appointed supervisor/coordinator
  - Regular status report forms
  - Scheduled meetings for updates, etc.
Maintaining Volunteers’ Involvement

Volunteers need reinforcement and encouragement. Checking in on their efforts will allow them to ask questions or deal with concerns.

To maintain the volunteer’s involvement – a crucial component in a volunteer program – incorporate the following:

- Train and inform volunteers.
- Make jobs and activities rewarding and fun!
- Provide volunteer ownership and delegate responsibility! Utilize the diverse talents of your volunteers!
- Recognize the volunteers!
  - Present plaques, pins, mugs, plants, etc.
  - Honor volunteers at a local/union event (spring dinner, tea, etc.)
  - Thank volunteers – sincerely and frequently – in person and in writing!
  - Report on volunteer efforts at local meetings and in local publications. List their names and include their pictures!
  - Host a special event for volunteers!
- Encourage volunteers to continue their involvement in the local. Continually provide opportunities for added responsibility.

To avoid frustration and failure . . . do not . . .

- Recruit via mailboxes! (This effort will end in the wastebasket!)
- Wait for volunteers to call you!
- Ignore planning, training and information!
- Forget to monitor and reward!
Guidelines for Organizing Effective Volunteer Committees

Some of the following suggestions are based upon work by Robert Kahn, Institute of Social Research, and University of Michigan.

RELATIONSHIP TO THE LOCAL PRESIDENT
A president is very often judged by the results of the members selected for committee positions. Regardless of the selection method, the president’s primary concern should be identification of individuals to carry out the responsibilities of each respective committee. A good, well-organized committee can assume many of the responsibilities, which burden a local president.

Local presidents need to provide specific direction to every committee so they are able to be productive and provide a finished product. This charge to the group is best provided in writing, and a verbal explanation given to the committee chair so there is clear understanding of what will be undertaken.

A simple rule of thumb to judge the effectiveness of a committee is the impact on a local president’s workload, i.e. if the committee works, the president doesn’t.

COMMITTEES AND THEIR REPORTS
Committees should be required to report on a regular basis, summarizing objectives, action programs, gains, and goals not attained. Experience has shown that committee reports and related discussion can make the difference between an alive and interesting local meeting and a dull and boring one. Hopefully, a good committee report is both short and interesting, and should include:

- The committee members’ names;
- The main activities of the committee;
- The problems and successes the committee is having and why; and
- A summary of the report, including the specific action requested, if any.

More detailed written reports can satisfy the committee’s need to report fully, yet keep the membership meeting time to a minimum. These written reports, especially those requiring action, should be distributed prior to the meeting so the members are informed without utilizing valuable meeting time.

FUNDING OF COMMITTEES
In many cases, we expect local committees to function on their own with volunteer help, time and funds like the school districts that expect their employees to provide extra time and supplies for the classroom. Local dues should be set to provide for payment of committee expenses so the members donating time to serve on committees aren’t also expected to underwrite the committee’s financial needs. Committees function for the welfare of the entire membership, and should, therefore, be financed by the local dues structure.

Each year committees should submit a program plan and budget to implement for the following year for inclusion in the next year’s budget. Anticipated expenditures should include supplies, mileage and any other meeting expenses. The combination of the committee needs and the regular anticipated business expense of the local should determine the dues level…not the dues level determining the program as is sometimes the case.
“HOW DO I GET PEOPLE TO DO A JOB?”
Ask them. Few people will volunteer services. This does not mean they don’t want to be active. People wait to be asked. Asking builds activity.

“WHO SHOULD ASK THEM?”
If possible, someone they know and trust – someone whose influence they respond to – a friend, a neighbor, a colleague in the same department, a person with prestige in the district. But, if you can’t arrange for someone else to ask, do it yourself. Remember . . . the act of asking is important!

After this has been done, be sure the new recruit is welcomed. The effective combination, therefore, is . . . being asked by someone the person already knows . . . being welcomed by whomever the person already knows . . . and being welcomed by whoever leads the activity.

“WHAT DO I TELL THEM?”
- Make clear what job you are asking them to do, and be sure it has a definite beginning and end. People don’t want to sign up for life, so don’t overwhelm them.
- Ask people to do things they can do well, especially in the beginning. People are more willing to begin tasks they know they can do. Later, when they are really a part of your group, they will be more willing to try new things.
- Tell each person how her/his job fits in with the rest. People want to understand things they are a part of, and they work best when they know others are depending on them.
- Let each person know her/his help is needed. If a person believes you are “just looking for people,” he/she will feel easily replaceable and less responsible for doing a job.
- Discuss with volunteers their personal goals and how they fit with those of the campaign. You must help people keep their expectations realistic or you won’t be able to meet them.
- Do the above tasks in person. Don’t rely only on printed circulars, letters, or phone calls. There is no substitute for face-to-face communication. It lets people know you consider the discussion important, and it provides you with a chance to be acquainted with each volunteer.
- You have a right to be enthusiastic about the importance of your work. Don’t apologize or belittle it. Your mood will be conveyed to the people you talk to, and they’ll respond to it.

“How do I build an active committee?”
- Keep records. You can’t keep it all in your head. Have a list of members, with names and up-to-date addresses and phone numbers. Keep minutes or notes of jobs to do and decisions made. Keep a list of each person’s skills and “strong suits.”
- Keep your committee together. Call meetings regularly; don’t just keep in touch with each person separately. People need to see and believe they are part of something big, not just hear about it from you. Let members share in deciding what jobs to do, how they can best be done, and who can do them best. They know some things you don’t, and they will work harder for things they decide themselves.
“HOW CAN I KEEP PEOPLE MOTIVATED?”

- **Set high standards of activity.** Members will take their cue from you. Remember – you probably won’t get more than you ask for.

- **For each activity, get agreement on group goals.** Achieving them will give everyone a real feeling of accomplishment. If there are no challenges, members believe their activity is unimportant.

- **Get enough people to do the job.** Overworked volunteers stop volunteering, and besides, the extra lift of the group really begins when you have more people involved.

- **Be sure members know their jobs and positions in the group.** It’s not enough for you to know; ask the volunteers and listen to make sure each individual also knows.

- **Do things at meetings.** Transact business. Make decisions. Review past work. Plan new tasks. People will be more committed to tasks the group has agreed upon. People will not continue attending meetings unless they see results!

- **Pay attention to individuals not meeting committee standards and expectations.** If you ignore their failure, other members will follow their example. If a member does not live up to committee standards, speak to the volunteer personally, asking frankly to identify the problem. Be encouraging, and offer help. Other members can speak to the person and show interest. Reassign the person to another task, if necessary.

- **Recognize good work and reward it.** What you can do will depend on the local situation, of course, but you can always commend good workers at meetings. Express your appreciation in person and write letters of thanks.
Both ESP and teacher presidents have requested ideas on how the two organizations can collaborate on activities or business of the union that affect both sides. The following are some suggestions to consider keeping in mind that will take the effort of at least one president to make the overture to begin the collaboration.

- Creating a positive image of education in the community through walk-a-thons, food shelf collections, blood drives, Adopt-A-Highway, American Education Week.

- Screen candidates for school board elections, and inform members of both locals where each candidate stands on education.

- Elections will provide the opportunity for all educators to elect candidates on the state and national level that are good for education. Locals can exchange information, and work together on campaigns.

- Within the school setting, work together on work site decision-making teams.

- See that the district’s Staff Development Committee respects the needs of all staff to receive funding for professional development.

- Car-pool to attend Education Minnesota Lobby Days, the Minnesota Educator Academy (MEA), Representative Convention, and area meetings.

- Together, sponsor recognition for local leaders and retirees in the spring.

- Hold one local function to welcome all new hires to the district, introduce the union to new staff, and provide information about the community.

- Hold joint governance meetings to learn more about each other and do training of leaders as one activity (effective use of building reps, grievance processing, etc.)

- Collectively conduct events such as a silent auction or talent show with the proceeds used for scholarships.

- Support each other in applying for grants from the Education Minnesota Foundation for Excellence in Teaching and Learning.
Is there a quick way to resolve conflict?

Much of how we resolve conflict has to do with our attitude towards it.

Remember... conflict is a natural and expected condition.
It is neutral... neither good or bad, right nor wrong.

How we deal with conflict—whether quickly or over the long term has more to do with the attitude we have as we approach it.

Ask yourself:

1. Do you see it as a neutral?
2. Do you see it as an opportunity for change?

What is conflict?
Two or more persons, ideas, things attempting to occupy the same space at the same time.

- Conflict is inevitable - it is certain to happen
- Conflict is seldom resolved or ended but can be successfully managed
- Conflict can be very positive if well managed

Conflict is productive when it results in:
- Needed change
- New learning
- Better use of information and resources
- A basis for problem solving
- Using energy in a productive way

Conflict is non-productive when it results in:
- Unnecessary change
- No new learning
- Polarization of individuals or groups
- Solidification of non-productive behavior
- Loss of energy by stereotyping or blaming
Who Manages Conflict Productively?

The One Who Characteristically:

- Uses descriptive rather than prescriptive language
- Presses for clarification
- Paraphrases and confirms understanding
- Asks for illustrations
- Directs and redirects analysis
- Supports the other person
- Tests perceptions of intentions
- Asks others what they are hearing
- Listens attentively and responsively
- Offers relevant information
- Reports own feelings
- Suggests alternatives
- Accepts others feelings
- Avoids changing the subject
- Does not try to explain the other’s behavior
- Soft-pedals expectations that bind the other
- Is easy on giving “advice”
- Can identify and pick up the winnings
Roadmap to Resolution
A Conflict Resolution Program for Members

Roadmap to Resolution is a conflict resolution program designed to meet the needs of teachers and educational support professionals in Minnesota.

Roadmap to Resolution offers members a process to settle conflicts that occur in the workplace between members. It utilizes self-resolution techniques and trained facilitators to lead discussions and use conflict resolution methods when the parties cannot resolve the conflict on their own.

Self-resolution techniques allow the resolution of conflicts without external help. Methods of self-resolution can include:

- Communication with the other party to the conflict.
- Use of methods to alleviate personal concerns about conflict without involving the other party.

When self-resolution is not effective, a facilitation is scheduled using Education Minnesota trained field staff. All parties meet to facilitate a resolution to the conflict being experienced.

The use of self-resolution techniques and guided facilitation have many benefits:

- The people involved in the conflict control the confidentiality of their conflict.
- Scheduling is easier with only the parties involved.
- Self-resolution avoids the perceived problems of neutrality, confidentiality, training, availability and conflicting roles that may exist with the use of a neutral third party.
- Training in conflict self-resolution can help individuals understand others' differences and decrease their conflict level.
- It enables problem solving without finger pointing.
- It helps individuals learn to act early in acknowledging conflict, responding rationally and without emotion, and dealing with conflict honestly and directly.
- It may prevent further conflict and possible discipline of members.
Who can use Roadmap to Resolution?
Teachers, instructors and educational support professionals (ESPs) who are Education Minnesota members can benefit from this program.

What types of conflicts should be addressed through Roadmap to Resolution?
Roadmap to Resolution is designed to assist members in resolving member-to-member workplace conflicts they encounter in the course of their duty day.

What types of conflicts should NOT be addressed through Roadmap to Resolution?
- Concerns that can be properly addressed through a union grievance procedure
- Disputes between union members and administrators
- Any type of harassment or discrimination complaint
- Criminal behavior

Contact your field staff for information on handling the above types of conflicts.

Where can I find more information about Roadmap to Resolution?
Roadmap to Resolution

What is Roadmap to Resolution?
Roadmap to Resolution is a conflict-resolution program tailored to meet the needs of teachers, instructors and educational support professionals (ESPs) in Minnesota.

How does Roadmap to Resolution work?
The program involves three steps:

- Step One helps the parties identify the conflict. Members are encouraged to address workplace disputes on their own and are provided guidance and a framework to deal with the conflict.

- Step Two can be used if the parties are unable to resolve the conflict themselves. A trained Conflict Management Facilitator meets with members to assist them in exploring possible resolutions of the conflict.

- Step Three involves the use of an external mediator to formally mediate the conflict.

Will every conflict utilize all three steps?
No, Roadmap to Resolution is designed to resolve the majority of conflicts through Step One. Steps Two and Three are designed to address particularly difficult situations that require the intervention of professionals. Step Three is only available if approved by Education Minnesota.

Conflict arises

Step One
Participating member(s) should use the Online Self Resolution guidelines at www.educationminnesota.org.

Step Two
Parties unable to resolve the conflict complete the Request for Facilitation form and submit to Education Minnesota. Parties are assigned a Conflict Management Facilitator and meet to resolve conflict.

Step Three
Parties are unable to resolve the conflict with the assistance of the Conflict Management Facilitator; Education Minnesota approves the use of mediation with an External Mediator.

Parties resolve the conflict themselves.

Parties resolve the conflict with the help of the Conflict Management Facilitator.

Parties resolve the conflict through mediation.
Maintain Legal Responsibilities

The local organization recognized by the State of Minnesota with the responsibility and authority to represent its members is an exclusive representative. This includes the responsibility to bargain the Collective Bargaining Agreement and monitor its implementation. The local union has the right and responsibility to process grievances to correct misunderstandings or misinterpretations of the Collective Bargaining Agreement.

An area of assistance and support for locals and members is through the Education Minnesota/AFT/NEA Legal Services Policy. This program assures that members receive appropriate legal assistance in matters relating to their employment. Local presidents should have knowledge of specific guidelines and procedures, which describe the eligibility, requirements, coverage, exclusions and appeal privileges of this program.

In this section is:
1. Education Minnesota Affiliate Standards and Financial Responsibilities
2. A quiz testing knowledge of the responsibility of an exclusive representative
3. Collective Bargaining Grievance Language: Got Much Junk?
4. Information on the Education Minnesota Legal Services Program
Education Minnesota Affiliate Standards and Financial Responsibilities

Preamble
One of the core values identified as a key component for Education Minnesota to achieve its mission to become the pre- eminent source of excellence in teaching and learning in Minnesota is integrity. To embrace this core value fully, Education Minnesota and all of its affiliates and intermediate organizations must conduct their business in full compliance with all applicable local, state and federal laws, rules and regulations, as well as the governing documents and policies of our national affiliates, the American Federation of Teachers and the National Education Association. Our members and the public expect and deserve a fidelity to integrity.

Affiliate leaders have a tremendous responsibility to live up to the trust given them by the members they serve. Leaders must follow standards that promote both accountability and the highest ethical behavior by all parties. Leaders have a fiduciary obligation to carry out their responsibilities with the utmost degree of good faith, honesty, integrity, loyalty and undivided service of the interest of the members.

Affiliate Guidelines
Conflict of Interest
It is the responsibility of the affiliate governing board and officer to act in the best interest of the affiliate, rather than in furtherance of personal interests or the interests of third parties.

Membership Information
Affiliates are obligated to timely submit membership information of sufficient quality to enable Education Minnesota, AFT, NEA, and the AFL-CIO to communicate with and provide direct benefits to members as well as determine the total affiliate dues obligation.

Dues Formula/Calculation
Education Minnesota calculates the dues for the Active Professional/Teachers/Faculty membership categories using the data reported by the Minnesota Department of Education on February 28 of each year on the average teacher salary. Education Minnesota calculates dues for the Active Education Support Professional (ESP) membership categories utilizing data reported from local affiliates on the average starting teacher salary.

Dues Transmittal
Affiliates have the option to choose between ten-month or twelve-month dues transmittal schedules. Payments are due by the 25\textsuperscript{th} of each month in the selected schedule.

New Affiliates
Newly certified affiliates are not required to begin submitting dues until the earlier of either 1) the ratification of the initial collective bargaining agreement for that affiliate or 2) one year from the date the affiliate is certified as the exclusive representative for the bargaining unit by the Minnesota Bureau of Mediation Services or the National Labor Relations Board. Current affiliates that restructure and continue as affiliates are not “new affiliates.”
Audits
Affiliates are subject to the following audit/review requirements:

<table>
<thead>
<tr>
<th>Number of Members</th>
<th>Minimum Type of Audit/Review Required</th>
<th>May Choose to Have</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,500 members or more</td>
<td>Audit by an Independent Certified Public Accountant (CPA)</td>
<td></td>
</tr>
<tr>
<td>At least 1,000 members but fewer than 2,500 members</td>
<td>Review by an Independent CPA</td>
<td>Audit by an Independent CPA</td>
</tr>
<tr>
<td>Fewer than 1,000 members</td>
<td>Review by an Internal Audit Committee</td>
<td>Audit or Review by an Independent CPA</td>
</tr>
</tbody>
</table>

A copy of the applicable report must be filed annually with Education Minnesota and must include a statement, signed by the affiliate’s principal officer and, if applicable, the independent auditor, certifying that the audit has been presented at a specified meeting of the affiliate’s governing body and published and made available to the members.

Intermediate Organizations
Intermediate Organizations are subject to the above audit requirement except that the standard for requiring an annual audit performed by an Independent CPA is whether the IO has revenue or assets of at least $100,000 instead of how many members are in the IO.

IRS Required Returns: Form 990, 990-EZ or 990-N (e-Postcard)
All affiliates are required to file Form 990, 990-EZ, or 990-N. Affiliates must prove that they have filed one of the returns each year. A signed statement by the affiliate’s president certifying the return has been filed, must be included with the affiliate’s annual audit report filed with Education Minnesota.

Affiliate Support
Successful implementation of the Affiliate Guidelines requires that we have an organized support system for persons involved with affiliate finances. To fulfill this obligation to our affiliates, Education Minnesota will:

- Upgrade and expand the content and distribution of the Treasurer Handbook
- Improve the communication system with affiliate Treasurers to make it more periodic and formal
- Provide ongoing and uniform financial and fiduciary training for Presidents and Treasurers
- Expand training to include Field Staff and those who serve on audit committees
- Expand training to include Intermediate Organizations
- Identify CPA firms for use by affiliates required to have an audit performed by an Independent Certified Public Accountant
- Coordinate and consolidate financial and fiduciary training programs offered by the AFT and NEA
Membership Timeline Information
For purposes of Representative Convention seating, continued participation in liability insurance programs, legal defense coverage, and continued participation in programs that include staff and financial assistance from Education Minnesota, AFT, NEA, and the AFL-CIO, affiliates have the following requirements:
- Timely payment of dues
- Timely submission of current audit
- Timely submission of names, addresses and phone numbers of officers and executive board
- Timely submission of current membership roster
- Timely submission of current constitution as revised/updated

Dues Transmittal
Affiliates/IOs that fail to submit dues in accordance with the agreed-upon dues transmittal schedule will be subject to the following arrearage notices:

<table>
<thead>
<tr>
<th>Length of Arrearage</th>
<th>Notice sent to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Two months</td>
<td>Affiliate/IO President and Treasurer</td>
</tr>
<tr>
<td>Three months</td>
<td>Affiliate/IO Governing Body</td>
</tr>
<tr>
<td>Four months</td>
<td>Affiliate/IO Membership</td>
</tr>
</tbody>
</table>

Dues Transmittal (NEA)
An affiliate delinquent in its dues transmittal schedule by more than thirty days is assessed an NEA penalty of two percent per month on the overdue balance. Unless waived by the NEA Executive Committee, delegates to the NEA Representative Assembly of an affiliate that fails to transmit dues in accordance with the dues transmittal schedule have no right to participate in the NEA Representative Assembly at the Annual Meeting other than to participate in elections for officers and vote on dues increases.

Audits
If an affiliate/IO fails to conduct and submit applicable audit/review within six months of the close of the affiliate/IO fiscal year, Education Minnesota is authorized to conduct the applicable audit/review at the affiliate/IO’s expense. Education Minnesota will notify the membership of the affiliate/IO that an audit/review is underway and will report the results of the audit/review to the membership of the affiliate/IO.

Guiding Principles
In cases where further action is required and in recognition of our dual affiliation with AFT and NEA, Education Minnesota will be responsible for monitoring affiliate compliance with state and national policies. In doing so, Education Minnesota will be guided by the following principles:

1. Whenever possible, consequences should be positive rather than punitive.
2. Whenever possible, consequences should apply to the affiliate rather than to the member.
3. Whenever possible, consequences should be progressive.
4. Whenever possible, include Intermediate Organizations in the process.
5. Whenever possible, consequences imposed will align with those required by the national organizations.
6. Provide reasonable opportunities to correct deficiencies prior to implementing consequences.

If affiliates are not in compliance, the Education Minnesota Executive Committee will authorize the Education Minnesota President and Executive Director to enter into discussions with both AFT and NEA regarding additional actions in order to bring the affiliate into compliance. Such actions will be consistent with the above principles and pursuant to national and state constitution and bylaw provisions. Actions taken by the Executive Committee to bring the affiliate into compliance are subject to the approval of the Education Minnesota Governing Board.
Determine whether the following statements are true or false by placing a (✓) in the appropriate space.

1. An exclusive representative has greater privileges in representing members than do competing organizations.
   ✓   
   ✓   

2. In negotiating and administering Collective Bargaining Agreement (filing grievances), the exclusive representative must represent members and non-members equally.
   ✓   
   ✓   

3. The exclusive representative must negotiate the same compensation for all members of that organization.
   ✓   
   ✓   

4. The exclusive representative is not obligated to represent non-members.
   ✓   
   ✓   

5. Collective Bargaining Agreements allow any individual covered by that Agreement to file and process a grievance.
   ✓   
   ✓   

6. An exclusive representative must file a grievance when a member of the bargaining unit brings a complaint to its attention.
   ✓   
   ✓   

7. Once a grievance has been filed, the exclusive representative has a duty to carry the grievance if unresolved, to the final step of the grievance procedure.
   ✓   
   ✓   

8. An exclusive representative may refuse to file a grievance, if, after investigation, it believes the complaint lacks merit.
   ✓   
   ✓   

9. An exclusive representative has a duty to provide legal representation to both members and non-members.
   ✓   
   ✓   

10. If an exclusive representative fails to investigate a complaint or fails to adequately process the complaint, the complainant may sue the exclusive representative or any of its agents.
    ✓   
    ✓   

88
TRUE
1. An exclusive representative has greater privileges in representing members than do competing organizations.
   Points to Stress: Defined by PELRA
   - Represent means to negotiate and enforce the terms and conditions of employment.
   - Legal representation will be clarified later.

TRUE
2. When negotiating and administering Collective Bargaining Agreement (filing grievances), the exclusive representative must represent members and non-members equally.
   Points to Stress: Unit vs. Union Distinction
   - Grievances are Collective Bargaining Agreement violations and are not exclusive to members.

FALSE
3. The exclusive representative must negotiate the same compensation for all members of that organization.
   Points to Stress: Not disparate treatment, but can be different categories.
   - Different compensation is possible as long as it is not based on discriminatory factors. Non-discriminatory examples – new employees are paid less than veteran employees, employees with special training might be paid more, etc. Discriminatory examples: Based on non-member vs. union member, gender, race, age, religion, marital status, sexual orientation, etc.

FALSE
4. The exclusive representative is not obligated to represent non-members.
   Points to Stress: If in unit . .

TRUE & FALSE
5. Collective Bargaining Agreements allow any individual covered by that Agreement to file and process a grievance.
   Points to Stress: Depends on Collective Bargaining Agreement grievance procedure.

FALSE
6. An exclusive representative must file a grievance when a member of the bargaining unit brings a complaint to its attention.
   Points to Stress: Depends on grievance policy and facts.

FALSE
7. Once a grievance has been filed, the exclusive representative has a duty to carry the grievance, if unresolved, to the final step of the grievance procedure.
   Points to Stress: Depends on facts uncovered along the way and grievance policy.
**TRUE**
8. An exclusive representative may refuse to file a grievance, if, after investigation, it believes the complaint lacks merit.
   Points to Stress: Good grievance policy states this clearly.

**FALSE**
9. An exclusive representative has a duty to provide legal representation to both members and non-members.
   Points to Stress: Education Minnesota Legal Policy
   Legal representation is usually a member only benefit except if the issue is a Collective Bargaining Agreement related grievance.

**TRUE**
10. If an exclusive representative fails to investigate a complaint or fails to adequately process the complaint, the complainant may sue the exclusive representative or any of its agents.
    Points to Stress: Yes, it is part of the obligations and responsibilities of the exclusive representative.
    But, and – Education Minnesota has policy covering them - this is called DFR.
**EDUCATION MINNESOTA**
**LEGAL SERVICES PROGRAM**

**Key Questions:**  
*Is the employee a member?*  
*What type of proceeding is it?*

<table>
<thead>
<tr>
<th>Type of Proceeding</th>
<th>Representation Provided</th>
<th>Members Only?</th>
</tr>
</thead>
<tbody>
<tr>
<td>School District Investigation</td>
<td>Field Staff</td>
<td>No</td>
</tr>
<tr>
<td>Discipline Grievance</td>
<td>Field Staff/Attorney at Arbitration</td>
<td>No</td>
</tr>
<tr>
<td>Discharge – Teacher <em>(K-12, public school)</em></td>
<td>Attorney</td>
<td>Yes</td>
</tr>
<tr>
<td>Discharge – Other</td>
<td>Attorney</td>
<td>No</td>
</tr>
<tr>
<td>Layoff – Teacher <em>(K-12, public school)</em></td>
<td>Field Staff/Attorney if a legal issue</td>
<td>Yes</td>
</tr>
<tr>
<td>Layoff – Other</td>
<td>Field Staff/Attorney at arbitration</td>
<td>No</td>
</tr>
<tr>
<td>MDE Investigation</td>
<td>Criminal Attorney provided through Legal Department</td>
<td>Yes</td>
</tr>
<tr>
<td>Criminal Investigation</td>
<td>Criminal Attorney provided through Legal Department</td>
<td>Yes</td>
</tr>
<tr>
<td>• Related to Job</td>
<td>Criminal Attorney provided through Legal Department (pre-charging)</td>
<td>No attorney provided</td>
</tr>
<tr>
<td>• Unrelated to job</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board of Teaching Investigation</td>
<td>Attorney&lt;sup&gt;2&lt;/sup&gt;</td>
<td>Yes</td>
</tr>
<tr>
<td>Investigation by other Board <em>(Social Work, Psychology, Nursing)</em></td>
<td>Attorney&lt;sup&gt;2&lt;/sup&gt;</td>
<td>Yes</td>
</tr>
<tr>
<td>Complaint to administrative agency <em>(i.e. Dept. of Human Rights, workers-compensation, unemployment)</em></td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

<sup>1</sup> In a proceeding arising under the Collective Bargaining Agreement (for example, layoff of ESPs), we provide representation to all unit members as part of our Duty of Fair Representation. In a statutory proceeding (for example, discharge of a K-12 public school teacher), we represent union members only.

<sup>2</sup> Some restrictions apply if member did not retain her/his job.
Important Dates

2021

October 21, 2021  Minnesota Educator Academy (MEA)
November 2, 2021  Election Day
November 15-19, 2021  American Education Week
November 17, 2021  Education Support Professionals (ESP) Day

2022

April 22-23, 2022  Representative Convention
May 1-7, 2022  National Teacher Appreciation Week
May 3, 2022  National Teacher Day
July 2-6, 2022  NEA Representative Assembly, Dallas Texas
July 14-17, 2022  AFT Convention, Boston, Massachusetts
August 1-3, 2022  Summer Seminar, College of St. Bens

Please check the Education Minnesota Web Site calendar for updates and other important dates.

www.educationminnesota.org
Local President – Education Minnesota Staff Relationships

An effective working relationship begins with an open conversation about how people expect to work together. This conversation may address questions such as:

- What are our expectations for our various roles?
- How will we work together?
- How will we mutually support each other’s work?

This conversation allows everyone involved to think intentionally about roles, responsibilities, and expectations.

If the working relationship is ongoing, it’s good practice to check in purposefully at least once a year to see how well the expectations are being met and to determine if any modifications need to be made to the working relationship. For shorter-term projects, in addition to a start-up conversation, a reflective conversation at the end of the project is a meaningful part of evaluating the effectiveness of the work.

Topics to discuss and review in a leader/staff working relationship:
The best way to engage in a ‘start-up’ conversation is face-to-face meeting. While the nature of the working relationship (ongoing v. project-based) may influence some of the topics discussed, these topics generally provide a solid footing for the conversation:

- Background
  - How long have you been in education? In staff work?
  - What inspired your union involvement?
  - What do you especially like about your union work? What do you find challenging?
- Review job/role descriptions
  - Define parameters of the work we do and don’t do in our respective roles
  - Share what is notable or pertinent about individual work styles
  - For Field staff:
    - Discuss how Field staff may serve as liaison between local and Education Minnesota
    - Define how and when Field staff are involved with member rights, bargaining, organizing, day-to-day union business, etc., with the local
- Communication preferences
  - How to communicate (phone, email, text, in-person)
  - When to communicate (before/after school, prep hour, etc.)
  - How often communication and checking-in should occur
  - Expectations for turn-around time in response to communications
  - Confidentiality:
    - Local leader-EdMN staff communication
    - In reference to work with specific members
- Nature of the local – what do we need to know to do our work?
  - Who actively participates in the local?
  - When does the local meet? When should EdMN staff be present?
What current goals and plans does the local have?
- Member recruitment, retention, and engagement planning
- Negotiations planning
- Member rights issues
- Community engagement

What is the relationship with district administration and the school board?
- Any additional expectations and topics to be covered?
- When will we check in regarding these topics?

Here are some common ways Field staff may help a local:

**Advocacy**
- Support leaders to uphold member rights
- Support leaders and members with contractual issues
- Provide training and support in contract negotiations and enforcement
- Assist in planning and implementing organizing efforts

**Training**
- Provide training on a variety of topics
- Facilitate training by Education Minnesota staff on issues determined by the local
- Help develop leaders within the local through training opportunities

**Consultancy**
- Offer guidance to local leaders on how to respond to current challenges and issues
- Assist local leaders by providing resources from the state and national unions
- Link leaders to Education Minnesota specialists in areas such as communications, education issues, membership, negotiations, member benefits, and legal support
- Connect leaders from various locals on issues of similar concern

**Planning**
- Assist leaders in developing member recruitment and retention plans
- Assist leaders in developing action plans to support local goals
- Work with leaders to ensure essential structures are in place in the local
**EDUCATION MINNESOTA ACRONYMS**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAA</td>
<td>American Arbitration Association</td>
</tr>
<tr>
<td>AC</td>
<td>Area Council</td>
</tr>
<tr>
<td>ACA</td>
<td>Affordable Care Act</td>
</tr>
<tr>
<td>ADA / IDEA</td>
<td>Americans with Disabilities Act / Individuals with Disabilities Education Act</td>
</tr>
<tr>
<td>ADM</td>
<td>Average Daily Membership (School Funding)</td>
</tr>
<tr>
<td>AEW</td>
<td>American Education Week</td>
</tr>
<tr>
<td>AFL-CIO</td>
<td>American Federation of Labor-Congress of Industrial Organizations</td>
</tr>
<tr>
<td>AFSCME</td>
<td>American Federation of State, County &amp; Municipal Employees</td>
</tr>
<tr>
<td>AFT</td>
<td>American Federation of Teachers</td>
</tr>
<tr>
<td>AFT EA</td>
<td>American Federation of Teachers Educator Academy</td>
</tr>
<tr>
<td>ALC</td>
<td>Area Labor Council</td>
</tr>
<tr>
<td>ATPPS</td>
<td>Alternative Teacher Professional Pay Systems</td>
</tr>
<tr>
<td>AYP</td>
<td>Adequate Yearly Progress (NCLB)</td>
</tr>
<tr>
<td>BMS</td>
<td>Bureau of Mediation Services</td>
</tr>
<tr>
<td>BR</td>
<td>Building Representative</td>
</tr>
<tr>
<td>CBOC</td>
<td>Collective Bargaining &amp; Organizing Conference</td>
</tr>
<tr>
<td>CLC</td>
<td>Central Labor Council</td>
</tr>
<tr>
<td>CLP</td>
<td>Council of Local Presidents</td>
</tr>
<tr>
<td>CNP</td>
<td>Certified Negotiator Program</td>
</tr>
<tr>
<td>DFR</td>
<td>Duty of Fair Representation</td>
</tr>
<tr>
<td>DOE</td>
<td>Minnesota Department of Education</td>
</tr>
<tr>
<td>DOER</td>
<td>Minnesota Department of Employee Relations</td>
</tr>
<tr>
<td>ECSU</td>
<td>Educational Coordinating Service Unit</td>
</tr>
<tr>
<td>ED</td>
<td>Election District (Geographic Representation on the Governing Board)</td>
</tr>
<tr>
<td>EEL</td>
<td>Educator’s Employment Liability Insurance (NEA)</td>
</tr>
<tr>
<td>EEOC</td>
<td>Equal Employment Opportunity Commission</td>
</tr>
<tr>
<td>EI</td>
<td>Education International (NEA)</td>
</tr>
<tr>
<td>EMAC</td>
<td>Ethnic Minority Affairs Committee</td>
</tr>
<tr>
<td>EMAE</td>
<td>Education Minnesota Aspiring Educators</td>
</tr>
<tr>
<td>EPIC</td>
<td>Educator Policy Innovation Center</td>
</tr>
<tr>
<td>ER&amp;D</td>
<td>Educational Research and Dissemination</td>
</tr>
<tr>
<td>ERA</td>
<td>Equal Rights Amendment</td>
</tr>
<tr>
<td>ESI</td>
<td>Economic Services Incorporated (Education Minnesota)</td>
</tr>
<tr>
<td>ESP</td>
<td>Educational Support Professionals</td>
</tr>
<tr>
<td>ESSA</td>
<td>Every Student Succeeds Act</td>
</tr>
<tr>
<td>FICA</td>
<td>Federal Insurance Contributions Act (Social Security)</td>
</tr>
<tr>
<td>Acronym</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td>FIRE</td>
<td>Facing Inequities and Racism in Education</td>
</tr>
<tr>
<td>FLSA</td>
<td>Fair Labor Standards Act</td>
</tr>
<tr>
<td>FMLA</td>
<td>Family Medical Leave Act</td>
</tr>
<tr>
<td>FR</td>
<td>Faculty Representative</td>
</tr>
<tr>
<td>FSA</td>
<td>Flexible Spending Account</td>
</tr>
<tr>
<td>FTE</td>
<td>Full Time Equivalent</td>
</tr>
<tr>
<td>GPS</td>
<td>Great Public Schools</td>
</tr>
<tr>
<td>GR</td>
<td>Government Relations</td>
</tr>
<tr>
<td>HCR</td>
<td>Human and Civil Rights Commission</td>
</tr>
<tr>
<td>HCA</td>
<td>Health Care Advocate</td>
</tr>
<tr>
<td>HIN</td>
<td>Health Information Network (NEA)</td>
</tr>
<tr>
<td>HITA</td>
<td>Health Insurance Transparency &amp; Accountability</td>
</tr>
<tr>
<td>HRA</td>
<td>Health Reimbursement Account</td>
</tr>
<tr>
<td>HSA</td>
<td>Health Care Savings Account</td>
</tr>
<tr>
<td>IO</td>
<td>Intermediate Organization (a/k/a UNISERV)</td>
</tr>
<tr>
<td>IPD</td>
<td>Instruction and Professional Development</td>
</tr>
<tr>
<td>ISD</td>
<td>Independent School District</td>
</tr>
<tr>
<td>KEYS</td>
<td>Keys to Excellence for your Schools (NEA)</td>
</tr>
<tr>
<td>LCAT</td>
<td>Local Community &amp; Action Team</td>
</tr>
<tr>
<td>LLE</td>
<td>League of Latino Educators</td>
</tr>
<tr>
<td>LMC</td>
<td>Labor Management Committee</td>
</tr>
<tr>
<td>LPI</td>
<td>Local Presidents Insider</td>
</tr>
<tr>
<td>LTS</td>
<td>Long Term Substitute</td>
</tr>
<tr>
<td>MACTE</td>
<td>Minnesota Association of Colleges of Teacher Education</td>
</tr>
<tr>
<td>MASA</td>
<td>Minnesota Association of School Administrators</td>
</tr>
<tr>
<td>MASSP</td>
<td>Minnesota Association of Secondary School Principals</td>
</tr>
<tr>
<td>MCLU</td>
<td>Minnesota Civil Liberties Union</td>
</tr>
<tr>
<td>MDE</td>
<td>Minnesota Department of Education (Now PELSB – see below)</td>
</tr>
<tr>
<td>MEA</td>
<td>Minnesota Educator Academy</td>
</tr>
<tr>
<td>MESPA</td>
<td>Minnesota Elementary School Principals’ Association</td>
</tr>
<tr>
<td>MnSCU</td>
<td>Minnesota State Colleges and Universities</td>
</tr>
<tr>
<td>MOA/MOU</td>
<td>Memorandum of Agreement/Memorandum of Understanding</td>
</tr>
<tr>
<td>MRA</td>
<td>Member Rights Advocate</td>
</tr>
<tr>
<td>MSBA</td>
<td>Minnesota School Boards’ Association</td>
</tr>
<tr>
<td>MSEA</td>
<td>Minnesota School Employees Association</td>
</tr>
<tr>
<td>MSCF</td>
<td>Minnesota State College Faculty (Education Minnesota Affiliate)</td>
</tr>
<tr>
<td>MSRS</td>
<td>Minnesota State Retirement System</td>
</tr>
<tr>
<td>NBCT</td>
<td>National Board Certified Teacher</td>
</tr>
<tr>
<td>NBPTS</td>
<td>National Board for Professional Teaching Standards</td>
</tr>
<tr>
<td>NCUEA</td>
<td>National Council of Urban Education Associations</td>
</tr>
<tr>
<td>NEA</td>
<td>National Education Association</td>
</tr>
<tr>
<td>NEA-FC</td>
<td>NEA Fund for Children</td>
</tr>
<tr>
<td>NEA-R</td>
<td>National Education Association-Retired</td>
</tr>
<tr>
<td>Abbreviation</td>
<td>Full Form</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>NFIE</td>
<td>National Foundation for the Improvement of Education</td>
</tr>
<tr>
<td>NLRB</td>
<td>National Labor Relations Board</td>
</tr>
<tr>
<td>OLC</td>
<td>Online Community (Education Minnesota)</td>
</tr>
<tr>
<td>PAC</td>
<td>Political Action Committee</td>
</tr>
<tr>
<td>PAR</td>
<td>Peer Assistance &amp; Review</td>
</tr>
<tr>
<td>PDA</td>
<td>Professional Development Advocate</td>
</tr>
<tr>
<td>PEIP</td>
<td>Public Employees Insurance Program</td>
</tr>
<tr>
<td>PELRA</td>
<td>Public Employment Labor Relations Act</td>
</tr>
<tr>
<td>PELSB</td>
<td>Professional Educator Licensing &amp; Standards Board (MDE)</td>
</tr>
<tr>
<td>PERA</td>
<td>Public Employees Retirement Association</td>
</tr>
<tr>
<td>PPU</td>
<td>Per Pupil Unit</td>
</tr>
<tr>
<td>PROAC</td>
<td>Professional Advocacy Committee</td>
</tr>
<tr>
<td>PSRP</td>
<td>Paraprofessionals and School Related Personnel (AFT)</td>
</tr>
<tr>
<td>RA</td>
<td>Representative Assembly (NEA)</td>
</tr>
<tr>
<td>RC</td>
<td>Representative Convention (Education Minnesota)</td>
</tr>
<tr>
<td>RIF</td>
<td>Reduction in Force</td>
</tr>
<tr>
<td>RTP</td>
<td>Release Time President</td>
</tr>
<tr>
<td>SRSEA</td>
<td>State Residential Schools Education Association (Education Minnesota Affiliate)</td>
</tr>
<tr>
<td>SWHI</td>
<td>Statewide Health Insurance</td>
</tr>
<tr>
<td>TDA</td>
<td>Tax Deferred Annuity</td>
</tr>
<tr>
<td>ToY</td>
<td>Teacher of the Year Program</td>
</tr>
<tr>
<td>TRA</td>
<td>Teachers Retirement Association</td>
</tr>
<tr>
<td>UEA</td>
<td>University Education Association – Crookston &amp; Duluth</td>
</tr>
<tr>
<td>UFARS</td>
<td>Uniform Financial &amp; Accounting &amp; Reporting System (Code in School Budgets)</td>
</tr>
<tr>
<td>ULA</td>
<td>Unrequested Leave of Absence</td>
</tr>
<tr>
<td>ULP</td>
<td>Unfair Labor Practice</td>
</tr>
<tr>
<td>UNISERV</td>
<td>United Services a/k/a Intermediate Organization (IO)</td>
</tr>
<tr>
<td>VEBAs</td>
<td>Voluntary Employee Benefit Arrangement</td>
</tr>
<tr>
<td>VoB</td>
<td>Value of Belonging / Member Engagement</td>
</tr>
<tr>
<td>WAL/WUL</td>
<td>Worksite Action Leader/Worksite Unity Leader</td>
</tr>
</tbody>
</table>
**Local Preparation for Bargaining**

The following is a list of baseline expectations for local preparation for bargaining. Unless a team is bargaining a first Collective Bargaining Agreement, the local should complete bargaining activities prior to field staff participation. Of course, if the bargaining team is composed of beginners or if the local has no experience in some of these activities, field staff should assist the local with training in how to accomplish these pre-bargaining tasks.

- Select and train the team members, and define the team members’ roles. Any opportunities that the team has to practice these roles prior to being at the bargaining table would be very beneficial.

- Survey members of the local and the survey results summarized, including past grievance settlements.

- The bargaining team has at least discussed what the priorities for a settlement are.

- The local has at least begun to organize its members for settlement and success. This organizing should be a continual activity.
  - A plan for communicating with members is in place
  - The roles of the bargaining team and the members are defined
  - A completed Environmental: i.e. what is the relationship between the union and the district? Has a recent levy failed or is one upcoming? Who holds the power to settle for the employer?
  - A social before the onset of bargaining can help build unity.
  - Ratification procedures clear and understood by all?

- Community organizing should also be ongoing so that it does not occur only around the bargaining of the Collective Bargaining Agreement.

- The local has filed the necessary Notice of Intent to Negotiate with the BMS and the employer.

- Costing data is collected and base year costs agreed to by the employer and the local. The local has entered all of the necessary data on the Education Minnesota costing model.
Emerging Leaders Program

New and potential leaders! Education Minnesota is committed to working with locals to identify and prepare you to become the union leaders of tomorrow through our Emerging Leaders Program.

We need union members who are:
- Interested in becoming leaders within their union
- Team players eager to learn
- Ready to develop their potential
- Committed to improving the profession
- Ready to mobilize their fellow members

Our curriculum will empower participants to:
- Identify aspects of quality leadership
- Develop their own leadership potential
- Embrace diversity in the workplace
- Understand and work with personality and generational differences
- Explore leadership opportunities within the union
- Develop the ability to engage members one on one
- Network with colleagues from across the state
- Manage conflict for positive outcomes
- Know the issues which have faced educators in the past
- Lead educators to face the issues of tomorrow

Keep updated by going to the Education Minnesota Web site. The link for the Emerging Leaders Program is:

http://www.educationminnesota.org/advocacy/Union-U/emerging-leaders-program

Questions? Contact your field staff.

Testimonials
“The Emerging Leaders training is outstanding! It is a great way to network, and a great way to learn how to be a leader. Even if you are not in a leadership role, it’s a great training that provides you tools to grow into one. You can even use the tools
and activities in your classroom. This training helps those of us who are new gain a deeper understanding of the union and how to help others gain the understanding as well.”

– Tammy Mezzenga, Intermediate District 287/Local 2209

“Whether you are new or an experienced teacher, this impactful and collaborative workshop, rooted in policy, education and leadership lays the, ‘we are all in this together’ groundwork for future growth and taking the lead. Highly recommended.”

– Steve Sandberg, Duluth Federation of Teachers

“Emerging leaders has been a great experience. It is a comprehensive overview of everything the union does which helped me know how I might get more involved. This training has helped me make connections with education professionals from across the state who have become fast friends. I look forward to seeing them again as I engage in future union activities. We are better together!”

– Sara McKeever, Sauk Rapids-Rice Education Association

“This Labor Day weekend is really hitting me differently than it has in years past. I have always celebrated the holiday, but I never truly understood why it existed. My time spent at the Emerging Leaders training helped me realize the important role unions have had in this country. I am now ready to contribute to this great narrative that is of union workers.”

– Will Ruffin II, Rochester Education Association
Local Election Reimbursement Policy

Purpose
The purpose of the local election reimbursement policy is to support a local’s involvement in a school board, levy or bond referendum election, or an election in which a member or retiree is running for a local office.

Funding
1. The Education Minnesota Political Action Committee will designate the amount to be used for assisting locals involved in local school elections, or to support member-candidates running for local office. The fiscal year shall be September 1-August 31.

2. A local may receive a reimbursement once per fiscal year in the year of the election. Additional local election reimbursement applications from a local, within one year will be considered by the PAC, on a case-by-case basis, if funds are available. Locals must be in good standing with their dues transmittal to be eligible for reimbursement.

3. Each local may request up to $5.00 of funds per member based on the number of members participating in reverse dues check-off. Each local may request an additional $2.00 per member if the additional funds are matched by the local. No local shall receive less than $750 of documented expenses.
   a. Qualifying membership will be calculated based on the number of members who participate in reverse dues check-off as of March 31 of the previous school year.
   b. A local must have at least 90% of their members participating in reverse dues check-off to qualify for local election assistance.
   c. Locals will be notified annually that:
      1. Their local is below the 90% threshold
      2. Their local is at or above the 90% threshold
      3. Their local has 100% participation

4. In the event that a particular situation in a local could have statewide implications for locals/districts, the Education Minnesota PAC may choose to grant additional dollars.
   a. Contributions to a political/activist/organization are only permitted after the local has received pre-approval from the PAC chair for this contribution.

5. Education Minnesota PAC strongly encourages locals involved in local elections to participate in campaign finance training from the Public Affairs Department or field staff in their respective field office.
6. Education Minnesota PAC strongly encourages each local requesting funding under this policy to have at least one member on the local levy committee.

Applications Process
1. Initial Application: Locals intending to apply for reimbursement shall complete the initial application and submit it to the Public Affairs Department prior to the election.
   a. Public Affairs staff shall process all initial applications that meet the membership requirement.
   b. If a local does not meet the requirement, it may submit an initial application along with an appeal letter. A subcommittee composed of the Education Minnesota President, Education Minnesota Secretary/Treasurer, and the Education Minnesota PAC Chair shall review and may approve initial applications that do not meet the membership requirement.

2. Final Approval: The PAC will make final approval, post-election, of all completed final applications. Final applications must be submitted not more than 90 days after the election and must include:
   a. A well organized campaign plan;
   b. Receipts/documentation of all campaign expenses;
   c. Official results of the election.
   d. Assurance that the proper campaign finance reports have been filed with the local school board clerk.

3. Loans to Locals: In the event a local is in need of funding prior to the election, a loan may be available for up to the full amount of their eligible reimbursement amount.
   a. To qualify for a loan, a “Loan Request” form must be submitted outlining the campaign and the rationale for the loan. The loan is subject to the initial approval process by the subcommittee of the PAC.
   b. In the event a completed final application with the required criteria is not submitted or approved, the loan must be repaid to the Education Minnesota PAC within 120 days of the election.

Report
A report of the reimbursement awards shall be made annually to the Education Minnesota Political Action Committee.
Organizing for Settlement Fund Policy

Education Minnesota Organizing for Settlement Fund Committee
41 Sherburne Ave., St. Paul, MN 55103
Last amended: July 16, 2020
# Table of contents

Introduction ...................................................................................................................... 1

Education Minnesota Organizing for Settlement Fund Policies and Guidelines .................. 1

   A. Education Minnesota Bylaws ...................................................................................... 1

   B. Organizing for Settlement Fund Committee ............................................................... 1

   C. Types of Loans and Grants ........................................................................................ 2

Education Minnesota's Assessment Team Information ......................................................... 2

   A. Settlement Assessment Team Responsibilities ............................................................ 2

   B. Procedures for Conducting a Settlement Assessment .................................................. 2

   C. Procedures for Approving Loans and Grants ............................................................... 3

Education Minnesota Local/Affiliate Information ............................................................... 4

   A. Settlement Assessment Procedures ........................................................................... 4

   B. Use of Organizing for Settlement Funds ................................................................... 5

   C. Organizing for Settlement Fund Loan Procedures ..................................................... 7

   D. Post-Settlement and Grant Procedures ..................................................................... 8

   E. Strike Assistance ...................................................................................................... 8

   F. Appeal Process ....................................................................................................... 9
Introduction

The Education Minnesota Organizing for Settlement Fund represents a commitment to assist local/state affiliates and members during protracted bargaining and strikes. Affiliates include any Education Minnesota local/state affiliate organization organized under and functioning within the Constitution and Bylaws of Education Minnesota.

The Organizing for Settlement Fund is intended to assist members and local/state affiliates in collective bargaining crises. The Organizing for Settlement Fund shall not be considered a source of revenue for routine expenditures.

Requests for Organizing for Settlement Fund assistance will always be reviewed keeping in mind the assets of the fund at the time the request is made. Each request received shall be reviewed on its merits relative to the guidelines. No grant is considered to be precedential.

The Organizing for Settlement Fund’s policies and this handbook’s guidelines are developed to help Education Minnesota, the Organizing for Settlement Fund Committee and affiliates determine how Organizing for Settlement Fund monies should be disbursed.

Education Minnesota Organizing for Settlement Fund Policies and Guidelines

A. Education Minnesota Bylaws

The Organizing for Settlement Fund is established in the Education Minnesota Bylaws as follows:

Article II, Section 3. Assessments: The Governing Board shall establish, maintain and administer guidelines for each assessment. Such assessments shall not be subject to reduction by any other provision of these Bylaws. The following annual assessments shall be collected from all active members:

- Organizing for Settlement Fund. The assessment shall be seven dollars ($7.00) per member.

B. Organizing for Settlement Fund Committee

1. Chairperson: The chairperson will be appointed by the Education Minnesota president and approved by the Education Minnesota Governing Board.

2. Other committee members: The president will appoint committee members subject to the approval of the governing board.

3. Function: The Organizing for Settlement Fund committee will:
   - Review all applications.
   - Take action on all loans under $15,000.00.
   - Make recommendations to the governing board for all loans $15,000.00 and over.
   - Review all expenses and receipts.
   - Make recommendations to the governing board for all grants.
   - Make policy recommendations to the governing board regarding use of funds.

4. If a committee member is unable to continue, either by resignation or as indicated by the inability to participate in a significant number of votes, a new appointment will be made by the Education Minnesota president to the Education Minnesota Governing Board to fill the position for the remainder of the term.
C. Types of Loans and Grants

1. The Education Minnesota Organizing for Settlement Fund may be used for the following:
   - A direct grant and/or loan to an Education Minnesota local/state affiliate for unusual contract negotiation expenses.
   - A direct grant or loan to an Education Minnesota local/state affiliate on strike.
   - A loan and/or loan guarantee to Education Minnesota members, who are participants in the Organizing for Settlement Fund, who are on strike.
   - A direct grant and/or loan for aid for sympathetic groups honoring a strike, or another local bargaining unit strike.

2. A grant for support of an educational bargaining unit on strike in another jurisdiction or another state, or to support any other union on strike, is the sole purview of the Education Minnesota Governing Board. The following guidelines will be used:
   - Formal note of support will be made upon notice of the strike.
   - For strikes lasting at least three (3) work days, consideration for financial support will be made at the end of the fifth (5) work day of the strike, if determined a donation would be accepted. The level of donation would be $2.00 per member with a minimum donation amount of $1,000.00 to a maximum amount of $10,000.00.

Education Minnesota’s Assessment Team Information

A. Settlement Assessment Team Responsibilities

1. The Organizing for Settlement Fund chair or designee will work with designated Education Minnesota staff to organize the assessment meeting. The assessment should be conducted as soon as possible.

   The assessment team should be the Organizing for Settlement Fund chair or governance designee, an assigned field staff and any other necessary staff. An Education Minnesota Governing Board member and/or Organizing for Settlement Fund Committee member will attend the settlement assessment meeting when possible.

2. The assessment team will review all pertinent data related to the issues in dispute and the negotiations process to date.

3. The team will also review all aspects of the local/state affiliate’s bargaining assessment program including its organizational structure, budget, internal communications, external public relations, political action and all other elements that may be necessary.

4. A written summary of the findings and recommendations should be filed with the designated Education Minnesota staff within seven days after conclusion of the assessment.

5. The expenses for the staff members of the assessment team shall be borne by their expense accounts. The expenses of the Education Minnesota members of the assessment team shall be borne by the Organizing for Settlement Fund.

B. Procedures for Conducting a Settlement Assessment

1. The settlement assessment team must include a minimum of three members including a local executive officer.

2. The settlement assessment meeting will be conducted by the assessment team with the chairperson presiding, at which the representatives of the local/state affiliate and the field staff person shall present to the team all relevant information on the following:
• History of bargaining in the district.
• History of bargaining in the district for the current year.
• Analysis of the immediate past master contract.
• Analysis of the financial condition of the district.
• Analysis of employer/local affiliate relationships on non-bargaining issues.
• Assessment of employer/administrative personnel.
• Assessment of local/state affiliate structure and program.
• Review of internal and external public relations efforts.
• Review of internal and external political action efforts.
• Readiness of local/state affiliate for strike.
• Other pertinent data.

3. The assessment team may request such information as it deems necessary to write its own report and make its recommendations.

4. The assessment team may, on its own volition, make surveys, conduct interviews or engage in other such assessments as it deems necessary.

5. The assessment team will prepare a written report concerning the status of the local/state affiliate. The written report shall include findings and recommendations related to settlement organizing and strike action.

6. The written report will be submitted within seven days after the conclusion of the assessment to designated Education Minnesota staff. Team recommendations for the affiliate should be communicated back to the local in a timely manner.

7. The field staff person assigned to the local/state affiliate involved will be responsible for making all physical arrangements for the settlement assessment and for the team members.

C. Procedures for Approving Loans and Grants

1. Each loan request received shall be reviewed on its merits relative to the guidelines. No grant is considered to be precedential.

2. Loan requests less than $15,000.00: The Organizing for Settlement Fund Committee will review an affiliate's settlement budget and the manager's written report and will vote to approve or deny the loan request.

3. Loan request $15,000.00 or more: The Education Minnesota Governing Board will approve loan applications of $15,000.00 or more.

4. At no time can the initial loan exceed $100,000.00.

5. The affiliate settlement budget can be amended as long as the amounts stay within the acceptable use guidelines. However, if an affiliate finds it necessary to increase the overall budget amount in excess of 10 percent, advance approval is required by notifying the Organizing for Settlement Fund Committee of the intent and to secure its approval.

6. Upon receipt of the final expense report (expense listing and photo copy of actual itemized receipts), the Organizing for Settlement Fund Committee will send a recommendation to the Education Minnesota Governing Board to convert 80 percent of the total approved expenses to a grant. Twenty percent of the approved expenses will be paid by the affiliate. In no case will Organizing for Settlement Fund assistance exceed 80 percent of the total cost incurred as determined by the final financial report.
In an effort to ensure that each local has a base amount of money to start the process of organizing for the settlement, the first $250.00 of the final financial report will not be subject to the 80-20 percent cost sharing. The first $250.00 will come from the Organizing for Settlement Fund paid in full. For the remaining amount, in no case will the Organizing for Settlement Fund assistance exceed 80 percent of the total cost incurred as determined by the final financial report.

7. Any affiliate that does not meet with the settlement assessment team prior to making expenditures for organizing activities is subject to the potential of a lower grant amount of 70 percent rather than 80 percent.

**Education Minnesota Local/Affiliate Information**

**A. Settlement Assessment Procedures**

1. To apply for an Organizing for Settlement Fund loan, the local/affiliate should request a settlement assessment meeting.
   - The request should be made in writing by the affiliate president to the Education Minnesota president, President.Denise.Specht@edmn.org.
   - The affiliate should seek advice and input of its assigned field staff person prior to requesting an assessment meeting.
   - Upon receipt of the request, Education Minnesota will arrange for the assessment to be conducted.
   - Settlement assessment information will be mailed to the affiliate president prior to the meeting. This includes Settlement Assessment Checklist, Loan Application, Team Report, Expense Reporting Form, and Organizing for Settlement Fund Handbook.

2. Pre-Assessment Meeting – Before the settlement assessment meeting takes place, the affiliate should:
   - Have a settlement committee in place.
   - Follow appropriate negotiations processes under the Public Employer Labor Relations Act.
   - Complete team report (mailed to affiliate president), including draft budget.
   - Invite members to the assessment (affiliate governance, negotiators and settlement committee members).

3. Settlement Assessment Meeting:
   - Bring two copies of the team report and a copy of the local’s constitution and bylaws.
   - Refreshments provided or meal expenses for the assessment will be paid by the Education Minnesota officer or staff in attendance of the assessment.
   - The Education Minnesota secretary-treasurer or Education Minnesota vice president, and Education Minnesota field staff member will attend the assessment.
   - The Education Minnesota officer in attendance will chair the assessment meeting.
   - The Education Minnesota settlement assessment team will discuss the Organizing for Settlement Fund’s policies, internal and external negotiations/organizing issues and the affiliate’s plans for settlement (including the use of the Organizing for Settlement Fund).

4. Post-Assessment Meeting:
   - Finalize settlement action plan and budget.
   - Complete loan application.
   - Submit loan application to director of field services with a copy to field staff.
NOTE: Intermediate Organizations are encouraged to offer opportunities for group settlement assessments when possible. The group assessment can be scheduled through IOs, field offices, at regional events and at statewide events such as Collective Bargaining and Organizing Conference, Summer Seminar, Political Conferences among others.

B. Use of Organizing for Settlement Funds

1. Organizing for Settlement Fund monies are only intended to be used for unusual contract negotiation expenses pursuant to this policy.

2. Funds may be used for mediation, arbitration, protracted negotiations and other organizing for settlement events.

3. Routine local/state affiliate negotiation costs such as negotiator or settlement committee honorariums, gifts, normal printing, postage, meeting expenses, etc., should be anticipated by the local/state affiliate and are not covered by the Organizing for Settlement Fund.

4. Funds may not be used to purchase alcohol or lottery tickets.

5. Reimbursement Limitations

   • Unity apparel and branded wearables: 80 percent of the total cost of all unity apparel and branded wearable items (i.e. clothing, hats, scarves, mittens, etc.) purchased by a local/state affiliate shall be reimbursed by the Organizing for Settlement Fund to a maximum cumulative reimbursement of $50 per member of the local/state affiliate. The local/state affiliate assumes responsibility for 100 percent of the costs above this figure.

   Example:
   
   150 members x $50.00 (80/20) = $7,500.00 maximum unity apparel/branded wearables
   95 members x $50.00 (80/20) = $4,750.00 maximum unity apparel/branded wearables

   • Non-consumable items not defined under unity clothing and apparels: 80 percent of the total cost of all non-consumable items that can be used beyond the organizing situation (i.e., coffee mugs, lanyards, stationery, etc.) purchased by a local/state affiliate shall be reimbursed by the Organizing for Settlement Fund to a maximum cumulative reimbursement of up to $25.00 per member of the local/state affiliate. The local/state affiliate assumes responsibility for 100 percent of the costs above this figure.

   Example:
   
   150 members x $25.00 (80/20)= $3,750.00 maximum non-consumables.
   95 members x $25.00 (80/20)= $2,375.00 maximum non-consumables.

   • Buttons, bumper stickers, window clings and strike-support signs shall not be subject to this maximum reimbursement restriction.

   • Food and beverage events: 80 percent of the costs of food and beverage related meeting(s) shall be reimbursed from the Organizing for Settlement Fund to a maximum reimbursement of $30.00 per member of the local/state affiliate in attendance at each event, as indicated on the required sign-in sheets. The local/state affiliate assumes responsibility for 100 percent of the costs above this figure. Reasonable allowances will be made to cover the costs associated with guests (e.g. family members, community members, etc.) in attendance at a food and beverage event and to account for no-shows. Such post-ratification events should take place within 60 days of ratification to be included in the Organizing for Settlement Fund loan/grant. Meal tips will be reimbursed to a maximum of 20% of the cost of the meal. Tips for delivered food will be reimbursed to a maximum of 10% of the total bill.
• Gift Cards – the following conditions must be met when using gift cards:

  • The number and dollar amount of the gift cards must be documented.
  • A list of all gift card recipients must be documented.
  • Gift cards are considered compensation by the Internal Revenue Service and accordingly must be added to all other income for 1099 purposes. (i.e. stipends, unvouched expense reimbursements, etc.)
  • The number of gift cards purchased is limited to the lesser of 25 gift cards or 20 percent of your total active membership per bargaining cycle. **Maximum value of each gift card may not exceed $20.00.**

Example:

45 members x 20% = 9 maximum gift cards
(of any value, not exceeding $20.00)

650 members x 20% = 25 maximum gift cards
(of any value, not exceeding $20.00)

6. Technology/Equipment reimbursements may be submitted for consideration as part of your plan along with the rationale as to why they are needed within the local. These purchases require committee approval prior to being purchased.

7. When submitted in advance as part of an Organizing for Settlement Fund loan application and approved by the Organizing for Settlement Fund Committee, funds may be used to provide release time or a stipend for local/affiliate members to coordinate/lead settlement organizing efforts on a temporary basis. Support provided to locals for internal organizers is limited in time to the duration of the current contract negotiations cycle. Eighty percent (80%) of the costs of release time for member organizers shall be reimbursed from the Organizing for Settlement Fund up to a maximum reimbursement of $20.00 per member of the local/state affiliate, subject to availability of Organizing for Settlement Fund income for the given bargaining cycle.

When locals experience protracted bargaining and there is a need for additional organizing after utilizing Education Minnesota staff, the local may submit a request for additional organizing help.

8. New local/state affiliates bargaining their first collective bargaining agreement shall be reimbursed at 100 percent of the cost of wages lost because of negotiations during the duty day.

9. Bargaining During the School Day: Expenses of bargaining during the school day shall not be considered for reimbursement by the Organizing for Settlement Fund unless all available contract leave has been exhausted.

10. Mediation Costs: Local/state affiliate costs for unusual mediation will be considered for Organizing for Settlement Fund assistance based on local/state affiliate size, financial need and merit. Routine costs of mediation should be anticipated as a local/state affiliate expense and are not covered by the Organizing for Settlement Fund.

11. Funds may be used for Local and Community Action Team (LCAT) training expenses beyond what is provided by Education Minnesota. Such expenses must comply with Organizing for Settlement Fund policy.

12. Interest Arbitration Expenses

  • The local/state affiliate cost for interest arbitration will be paid in full by the Organizing for Settlement Fund.
  • Interest arbitration expenses are not subject to the 80 percent reimbursement guideline. Reimbursable costs include the local/state affiliate’s share of the arbitrator’s bill, the expense of preparing the Education Minnesota arbitration brief (including any secretarial overtime), and any other appropriate expense related directly to the interest arbitration.
• Interest arbitration costs will be reimbursed only if the following obligations are met by the local/state affiliate:
  • The local/state affiliate membership must approve a recommendation to request interest arbitration. The recommendation should be presented with the support of the local/state affiliate executive committee and negotiations team. Such a recommendation shall be presented for local/state affiliate approval only after consultation with the Education Minnesota field staff person, the Education Minnesota negotiations department, and an Education Minnesota manager. The recommendation will include the form of interest arbitration to be utilized by the parties.
  • The local/state affiliate will pass the recommendation to proceed to interest arbitration by a two-thirds vote of the general membership unless otherwise specified in the local/state affiliate’s constitution and bylaws (faculty representative assembly or other duly constituted body). This shall be at a meeting that has been called and publicized for this purpose.
  • Final position for the local/state affiliate will be established by the local/state affiliate negotiations team and executive committee after consultation with the Education Minnesota field staff person and the Education Minnesota negotiations department.
  • The local/state affiliate’s brief will be prepared by the appropriate Education Minnesota staff. Education Minnesota will consult with the local/state affiliate’s negotiations team, elected leaders and the Education Minnesota negotiations department during this process.
  • The local/state affiliate will provide in a timely manner all information necessary for the completion of the brief and materials for presentation at the arbitration hearing.
  • The local/state affiliate’s arbitration position will be presented by the appropriate Education Minnesota staff person(s) as determined by the director of field services.

13. Payment of Insurance Premiums
   • A loan may be obtained by the local/state affiliate for the purpose of maintaining payment of contracted member insurance premiums such as health, dental, life and long-term disability during a strike.
   • Funds lent for this purpose must be repaid to the Organizing for Settlement Fund in full within 60 days of the conclusion of the settlement.

14. A loan for funds to assist another educational employee bargaining unit on strike in the district may be approved upon request by a local/state affiliate. Up to 80 percent of such costs will be considered by the Organizing for Settlement Fund Committee if a minimum of 20 percent of the costs of such assistance is paid by the local/state affiliate.

15. Preliminary Assistance: Preliminary assistance may be lent based on a projected strike or settlement organizing budget submitted by the local/state affiliate.

C. Organizing for Settlement Fund Loan Procedures
1. Finalize a settlement action plan and loan budget.
2. Complete the loan application and mail it, along with the necessary information, to: Education Minnesota Organizing for Settlement Fund, 41 Sherburne Ave., St. Paul, MN 55103.
3. An affiliate must make formal application for a settlement assessment meeting before any Organizing for Settlement Funds are disbursed to the local.
4. Unless otherwise specified in the guidelines, all funds will be forwarded in the form of a loan to the local/affiliate.
5. Upon approval, the loan check will be mailed to the affiliate president.

6. The affiliate will be responsible for the administration, disbursement and accounting of the funds. Documentation, receipts and sign in sheets or rosters for meals should be kept for every loan expense.

**D. Post-Settlement and Grant Procedures**

1. All unused funds from the loan shall be returned to the Organizing for Settlement Fund within 60 days of the ratification (by both the local/affiliate and administration) of the contract. For locals where there are multiple contracts within the local, the 60 days begins after the ratification of the last contract within the local.

2. Within 60 days of ratification of the contract, the local affiliate shall submit a financial report detailing all expenditures, supported with photocopies of original, itemized receipts and sign in sheets or rosters. Expenses that lack proper documentation, or do not follow Organizing for Settlement Fund policies, will not be reimbursed. An extension may be granted if circumstances make compliance difficult.

   The unused portion of the loan and the financial report with photocopies of original itemized receipts should be mailed to: Education Minnesota Organizing for Settlement Fund, 41 Sherburne Ave., St. Paul, MN 55103.

   The local retains all original receipts for their records.

3. Before submitting the grant proposal to the committee, the lead officer from the settlement assessment will preview the grant and will include the supporting officer in the process.

4. Following review of the financial report for policy conformance, the Organizing for Settlement Fund Committee will forward a recommendation to the governing board converting 80 percent of the total approved expenses to a grant. 20 percent of the approved expenses will be paid by the local/state affiliate.

5. In no case will Organizing for Settlement Fund assistance exceed 80 percent of the total cost incurred as determined by the final financial report prepared at the conclusion of the settlement unless otherwise specified in the guidelines. Locals unable to pay their balance due in full may set up a payment plan with the Education Minnesota secretary-treasurer.

6. Costs incurred more than 60 days after the ratification of the contract will ordinarily not be considered for reimbursement from the Organizing for Settlement Fund. An extension may be requested.

7. Before a local will be considered eligible for accessing the Organizing for Settlement Funds, the local must be current on any and all previous Organizing for Settlement Fund loan amounts.

**E. Strike Assistance**

1. The local/state affiliate must complete an Organizing for Settlement Fund settlement assessment meeting prior to making an application for Organizing for Settlement Fund assistance.

2. A local/state affiliate contemplating a strike should consult with the appropriate Education Minnesota field manager for additional financial and staff assistance prior to the commencement of a strike vote.

3. Local Affiliate Strike Vote Prior to Receiving Assistance

   Prior to receiving funds for a strike, the local/state affiliate must conduct a strike vote at a general membership meeting called expressly for that purpose. The vote shall be conducted by secret ballot. Two-thirds of the Education Minnesota membership must vote approval of a strike action.
4. Individual Member Loans

- Education Minnesota members who are participants in the Organizing for Settlement Fund and on strike may be eligible for loans and/or loan guarantees subject to the application procedures. The strike loan program is funded and administered by a credit union or one of our national affiliates. Education Minnesota will coordinate such administration.

- Individual members must first apply for their loan through their local/state affiliate. If the local/state affiliate refuses to process the application, the individual member may appeal directly to the Organizing for Settlement Fund Committee.

- Loans during a strike may be received only after the fifth working day of the strike, but can be made retroactive to the first day of the strike. Members become eligible for a loan after the first pay period where there has been a loss of wages due to the strike.

- Personal loans will be processed through the local/state affiliate with the assistance of the Education Minnesota field staff assigned to the local.

- Personal loans or loan guarantees from the Organizing for Settlement Fund shall be outlined in the Education Minnesota Strike Loan Program document. This document will be made available through the Education Minnesota director of field services.

F. Appeal Process

1. A local has the right to appeal a denial of Organizing for Settlement Fund money to the Education Minnesota president if a written request for appeal is submitted to the Education Minnesota president, President.Denise.Specht@edmn.org within 20 calendar days after the notice of the denial is mailed. This right of appeal is waived if not made in a timely manner.

2. An appeal must be in writing, signed by the local president, state the address and telephone number of the party, and contain a concise statement of the facts and reasons Education Minnesota should provide Organizing for Settlement Fund money.

   The appeal information should include:

   - Copy of payment (cancelled check, non-itemized receipt etc.)

   - Paragraph stating in detail why original receipt cannot be obtained signed off by vendor, local president and local treasurer.

   - Signed Education Minnesota Organizing for Settlement Fund Appeal Process form of intent to appeal.

3. The Education Minnesota president shall call a meeting of the Education Minnesota Executive Committee to hear and decide the appeal using the recommendation of the Organizing for Settlement Fund Committee as a guide.

4. The appealing party shall be notified of the date of the hearing and shall be allowed to submit written materials for the committee’s consideration. The Organizing for Settlement Fund chair shall be available to present rationale for the denial of Organizing for Settlement Fund money.

5. The decision of the executive committee shall be final and the appealing party shall be advised in writing of the decision.
Meet and Confer

Spring 2014

The union of 70,000 educators
TABLE OF CONTENTS

Meet and Confer ........................................................................................................ 2
Meet and Confer ideas ........................................................................................................ 4
Meet and Confer plan example from one local ........................................................................ 6
Sample survey Meet and Confer information request form .................................................. 7
Meet and Confer exercise ...................................................................................................... 12
Possible Meet and Confer topics ............................................................................................ 13
Meet and Confer at a glance .................................................................................................. 14
MEET AND CONFER

1. WHAT is Meet and Confer?

Meet and Confer meetings provide for a formal “...exchange of views and concerns between employers and their employees.” (M.S. 179A.03, Subd. 10)

Further (M.S. 179A.07, Subd. 3), states “A public employer has the obligation to meet and confer, under (M.S. 179A.08), with professional employees to discuss policies and other matters relating to their employment which are not terms and conditions of employment.”

NOTE: Neither the Union nor the District can use Meet and Confer to solve contractual disputes nor should either party propose moving issues from the bargaining table to meet and confer.

2. WHY should we Meet and Confer?

Minnesota’s Public Employment Labor Relations Act (PELRA) (M.S. 179A.01) states that “...orderly and constructive relationships...” need to be maintained between the employer and all employees. Meet and confer rights and obligations help maintain this “orderly and constructive...” relationship.

3. WHO is involved in the Meet and Confer process?

A. The Exclusive Rep

PELRA also provides for exclusive representation status as the process to be used for communications between the employer and the employees. The District may not discuss ideas or share concerns with any employee or group of employees, except through the Exclusive Representative.

(M.S. 179A.07, Subd. 4). This employer may however, seek the advice or ideas of a teacher if “...this communication is a part of the employee’s work assignment.” (For example: the reading teachers report to the Board on student reading test scores.)

a. Professional Employee Defined (teachers)

PELRA states that teachers have “knowledge, expertise, and dedication” which are beneficial to the District. (M.S. 179A.08, Subd. 1; M.S. 179A.03, Subd. 13).

b. Educational Support Professionals

Meet and Confer should be negotiated into the collective bargaining agreement. The language should state the process the ESP local and the employer will follow.

B. The District

The District selects or appoints its representatives to Meet and Confer. This should follow the policy and ground rules of the committee.
4. WHEN and how often are meetings required?

(M.S. 179A.08, Subd. 2). The public employer shall provide the facilities and set the time for these conferences to take place. The parties shall meet at least once every four months. Some Districts and locals hold monthly Meet and Confer meetings. The Statute also allows the District to set the time of the Meet and Confer meetings.

5. WHERE do we meet?

The District is required to provide the facilities for such meetings. Many meetings are held in the Board Room or classrooms. (M.S. 179A.08, Subd. 2).

6. HOW should Meet and Confer meetings be scheduled?

The Statute is silent on this. The Exclusive Rep and the District should discuss the process. The following steps may be helpful:

1. Arrange for a meeting (date, time, location).
2. Determine who will represent the local.
3. Plan and share the agenda in advance of meeting.
   a. List of issues.
   b. Both parties do their own research.
4. Use problem-solving methods to examine issues, discuss, research, seek alternatives, develop implementation plans, review.
5. Determine process to be used to implement the proposed resolution:
   a. Memorandum of Understanding recommendation.
   b. Board policy – adoption/revision.
   c. Administrative action.
   d. Other?

7. Are Meet and Confer meetings open to the public?

Meet and Confer is a committee required by PELRA and composed of representatives from the Union and the District. Meet and Confer is not subject to the open meeting law unless a quorum of Board members participates on the committee.

If the Union and District wish to open the meeting, they should develop ground rules and committee guidelines. For example, the committee could have public comment during a portion of the meeting. It could use subcommittees to meet and report back.
MEET AND CONFER IDEAS

Preparing for the session:

1. Build an agenda by identifying problems and issues. Gather topics from individual members. This is often done at the building sites. A sample data-collecting sheet is attached. Members should be allowed to remain anonymous if they so choose. Some will not air their concerns if they think they will be singled out.

2. A designated meet and confer committee should compile a group list from the individual surveys. If possible, include a statement of the desired outcome or condition as a resolution.

3. An attempt should be made to address concerns at the site level if possible.

4. Any issues that cannot be resolved at the site level, should be forwarded to the Local President (or meet and confer chair) who will then compile the Meet and Confer agenda.

5. Arrange for the meeting (date, time, and place) in accordance with the ground rules you have established.

6. Share the agenda in advance of the meeting. Often, the local President meets with the Superintendent to finalize the agenda. At this meeting, the District adds its issues and a joint agenda is prepared.

Conducting the session:

1. Establish guidelines and group processes for the first meeting and future meetings.

2. Identify the positives and the problems.

3. Discuss the information and/or research.

4. Use problem-solving methods (consider options and alternatives).

5. Examine the advantages and disadvantages of each potential solution.

6. Reach agreement or consensus on the best solution.

7. Determine the process to be used to implement the proposed resolution.

8. Determine how the information will be shared with members.
Follow-up:

1. Members should receive communication of topics addressed at meet and confer.
2. Members should be informed about remedies discussed and/or agreed upon.
3. If a remedy is agreed upon, check to be sure that decision is implemented!

Meet and Confer ground rules suggested topics

1. Who should be on the committee?
   a. Number from Board (be mindful of Board quorum).
   b. Number from Administration.
   c. Number from Union.

2. How are members selected?
   a. The Exclusive Rep should appoint or elect its representatives.
   b. The District determines its process for selection.

3. Length of term
   a. Staggered terms.
   b. Filling of vacancies.

4. How will meetings be scheduled?
   a. 3 pre-set dates a year.
   b. 3 pre-set dates with optional 4th.
   c. Every other month.
   d. Other?

5. How is the meeting chaired?
   a. Rotating between the parties.
   b. Election of a chair by the committee.
   c. Other?

6. How are the minutes or notes taken?
   a. Appointment of notetaker.
   b. Election of notetaker.
   c. Rotation between the parties.

7. How will the agenda be developed?
   a. Input from both parties.
   b. How far in advance.

8. How will the minutes be published?
   a. Joint preparation of notes.
   b. Same message to both parties.

9. How will the recommendations be followed up or implemented?
10. What are the group norms?
11. How will the committee handle visitors or those who wish to attend?
MEET AND CONFER PLAN
EXAMPLE FROM ONE LOCAL

ORGANIZATION – Since this was the first meeting, several decisions were reached regarding organizational details.

A. Purpose

The Public Employment Labor Relations Act (PELRA) says that “Meet and Confer” means the exchange of views and concerns between employees and their respective employers. Educational policies of the District are specifically noted in this regard.

B. Number of Meetings

1. PELRA requires meetings at least three times a year; the impending contract between the Board and EA says not less than once every two months.

2. Tentative dates were set as follows:
   a. First Thursday in May
   b. Last Thursday in August
   c. First Thursday in the following months: October; December; February; April; June

C. Place and Time

It was agreed to meet from 4:00 to 5:00 p.m. in the Administration Building.

D. Membership: The Board and the EA Appoint Three People Each

1. EA President
2. EA President Elect
3. EA Appointee
4. Board Member
5. Superintendent
6. Board Appointee

E. Recommendations

When four or more members agree to a written recommendation, it will be signed and be forwarded for consideration to these parties: Superintendent, Local EA, and the Board of Education.

F. General Communications

Following each meeting, a joint statement will be issued regarding the topics that were discussed during the “Meet and Confer” session. This will be sent to all teachers, administrators, and Board members. No editorializing is expected, only the sharing of topics discussed and general information thereto. Board and the Local EA will take turns in drafting the communication.
SAMPLE SURVEY MEET AND CONFERENCE
INFORMATION REQUEST FORM

Our Local, along with our school administration and board members, will be holding a Meet and Confer meeting (date) in (place) at (time). This is an opportunity for dialogue on non-contractual issues. Please list below any items or issues you feel need to be addressed and discussed.

Recognition of positive actions within a Local/District is valuable and should be acknowledged. Please list these accomplishments below. List any ideas that may continue to help improve our Local/District or things that we are doing now that we should continue to do because they are working well.

*List below items of concern that you may have within your building or within the District. Please suggest any action plan options for each concern that you feel may help resolve the problem.

*If at all possible, know what outcome you believe will resolve the issue. Action plan “key” words to use:
  - Use “we” statements -
    - “We think…”
    - “We need to…”
    - “We believe…”
    - “Based on the facts/research, we know…”
  - Include such words as Critical, Vital, Must be Done, and Urgent.
M.S. 179A.01 Public Policy

It is the public policy of this state and the purpose of Sections 179A.01 to 179A.25 to promote orderly and constructive relationships between all public employers and their employees.

This policy is subject to the paramount right of the citizens of this state to keep inviolate the guarantees for their health, education, safety, and welfare.

The relationships between the public, public employees, and employer governing bodies involve responsibilities to the public and a need for cooperation and employment protection which are different from those found in the private sector. The importance or necessity of some services to the public can create imbalances in the relative bargaining power between public employees and employers. As a result, unique approaches to negotiations and resolutions of disputes between public employees and employers are necessary.

Unresolved disputes between the public employer and its employees are injurious to the public as well as to the parties.

Adequate means must be established for minimizing them and providing for their resolution. Within these limitations and considerations, the legislature has determined that overall policy is best accomplished by:

1. Granting public employees certain rights to organize and choose freely their representatives;

2. Requiring public employers to meet and negotiate with public employees in an appropriate bargaining unit and providing that the result of bargaining be in written agreements; and

3. Establishing special rights, responsibilities, procedures, and limitations regarding public employment relationships which will provide for the protection of the rights of the public employee, the public employer, and the public at large.

Nothing in Sections 179A.01 to 179A.25 impairs, modifies, or alters authority of the legislature to establish rates of pay, or retirement, or other benefits for its employees.
179A.03 Definitions

Subd. 10. Meet and Confer.

“Meet and Confer” means the exchange of views and concerns between employers and their employees.

Subd. 11. Meet and Negotiate.

“Meet and Negotiate” means the performance of the mutual obligations of public employers and the exclusive representatives of public employees to meet at reasonable times, including where possible meeting in advance of the budget-making process, with the good faith intent of entering into an agreement on terms and conditions of employment. This obligation does not compel either party to agree to a proposal to make a concession.

Subd. 13. Professional Employee.

“Professional employee” means: (a) any employee engaged in work (i) predominantly intellectual and varied in character as opposed to routine mental, manual, mechanical, or physical work; (ii) involving the consistent exercise of discretion and judgment in its performance; (iii) of a character that the output produced or the result accomplished cannot be standardized in relation to a given period of time; and (iv) requiring advanced knowledge in a field of science or learning customarily acquired by a prolonged course of specialized intellectual instruction and study in an institution of higher learning or a hospital, as distinguished from a general academic education, an apprenticeship, or training in the performance of routine mental, manual, or physical processes; or (b) any employee, who (i) has completed the course of advanced instruction and study described in clause (iv) of paragraph (a); and (ii) is performing related work under the supervision of a professional person to qualify as a professional employee as defined in paragraph (a); or (c) a teacher.


“Terms and Conditions of Employment” means the hours of employment, the compensation therefore including fringe benefits except retirement contributions or benefits other than employer payment of, or contributions to, premiums for group insurance coverage of retired employees or severance pay, and the employer’s personnel policies affecting the working conditions of the employees. In the case of professional employees the term does not mean education policies of a school district. “Terms and conditions of employment” is subject to Section 179A.07.
179A.06 Rights and Obligations of Employees

Subd. 4. Meet and Confer.

Professional employees have the right to Meet and Confer under Section 179A.08, with public employers regarding policies and matters other than terms and conditions of employment.

Subd. 5. Meet and Negotiate.

Public employees, through their certified exclusive representative, have the right and obligation to meet and negotiate in good faith with their employer regarding grievance procedures and the terms and conditions of employment, but this obligation does not compel the exclusive representative to agree to a proposal or require the making of a concession.

179A.07 Rights and Obligations of Employers

Subd. 1. Inherent Managerial Policy

A public employer is not required to meet and negotiate on matters of inherent managerial policy. Matters of inherent managerial policy include, but are not limited to, such areas of discretion or policy as the functions and programs of the employer, its overall budget, utilization of technology, the organizational structure, selection of personnel, and direction and the number of personnel. No public employer shall sign an agreement which limits its right to select persons to serve as supervisory employees or state managers under section 43A.18, subdivision 3, or requires the use of seniority in their selection.

Subd. 2. Meet and Negotiate.

(a) A public employer has an obligation to meet and negotiate in good faith with the exclusive representative of public employees in an appropriate unit regarding grievance procedures and the terms and conditions of employment, but this obligation does not compel the public employer or its representative to agree to a proposal or require the making of a concession. The public employer's duty under this subdivision exists notwithstanding contrary provisions in a municipal charter, ordinance, or resolution. A provision of a municipal charter, ordinance, or resolution which limits or restricts a public employer from negotiating or from entering into binding contracts with exclusive representatives is superseded by this subdivision.

(b) In addition, a public employer may, but does not have an obligation to, meet and negotiate in good faith with the Exclusive Representative of public employees in an appropriate unit regarding an employer contribution to the state of Minnesota deferred compensation plan authorized by section 356.24, paragraph (a), clause (4), within the limits set by section 356.24, paragraph (a), clause (4).
Subd. 3. Meet and Confer.

A public employer has the obligation to meet and confer, under section 179A.08, with professional employees to discuss policies and other matters relating to their employment which are not terms and conditions of employment.

Subd. 4. Other Communication.

If an Exclusive Representative has been certified for an appropriate unit, the employer shall not meet and negotiate or meet and confer with any employee or group of employees who are in that unit except through the exclusive representative. This subdivision does not prevent communication to the employer, other than through the exclusive representative, of advice or recommendations by professional employees, if this communication is a part of the employee’s work assignment. This subdivision does not prevent communication between public postsecondary employers and postsecondary professional employees, other than through the Exclusive Representative, regarding policies and matters that are not terms and conditions of employment.

179A.08 Policy Consultants

Subd. 1. Professional Employees.

The legislature recognizes that professional employees possess knowledge, expertise, and dedication which is helpful and necessary to the operation and quality of public services and which may assist public employers in developing their policies. It is, therefore, the policy of this state to encourage close cooperation between public employers and professional employees by providing for discussions and the mutual exchange of ideas regarding all matters that are not terms and conditions of employment.

Subd. 2. Meet and Confer.

The professional employees shall select a representative to Meet and Confer with a representative committee of the public employer on matters not specified under Section 179A.03, Subdivision 19, relating to the services being provided to the public. The public employer shall provide the facilities and set the time for these conferences to take place. The parties shall meet at least once every four months.
MEET AND CONFER EXERCISE

Should the following be topics for meet and confer in your local? Why or why not?

- Internal Transfers
- Staff Morale
- Class Size
- Make Up Days
- Posting of Vacancies
- School Calendar
- Field Trips
- Student Discipline
- Staff Right to Leave the Building at Lunch
- Limit on 403B Companies
- Assignment of Student Teachers
- Stipends for Supervising Student Teachers*
- Subbing for Colleagues
- Implementation of Graduation Standards
- Pay Differentials

*If the work of supervising student teachers is part of the bargaining unit member’s work, any benefits (including stipend or salary) should be in the contract. The source of the funding does not matter. If a University pays a school District for this work, then the Exclusive Rep should bargain over how it is paid out to teachers who do the work.

Supervising teacher stipend sample contract language:

Teachers who supervise student teachers will, for each student teacher supervised, be paid a stipend equal to ____ % of the payment made to the District by a college or university placing a student teacher in the District. In the event that no payment is received from the college or university placing the student teacher a stipend of $_____ shall be paid to the supervising teacher.
POSSIBLE MEET AND CONFER TOPICS

Always ask first: Is this topic a term and condition of employment? Is this issue addressed in our contract?

If the answer is yes, it is not appropriate for Meet and Confer.

- Use of teacher aides and paraprofessionals.
- Field trips.
- Student suspension/removal from class.
- Need for additional staff.
- Advance notice on workshops.
- Scheduling of parent conferences.
- Academic letter awards.
- Learning environmental conditions.
- Availability of building facilities – technology, gymnasium for staff.
- Calendar (starting/ending dates, vacation, etc.).
- Posting of vacancies.
- Makeup days/dates.
- Discipline incidents/increases in number.
- Lunch room control.
- Communication channels between staff and administration.
- Extra-duty assignments.
- Limit on 403B companies.
- School visitors’ policy.
- Procedures during construction.
- Leaving building during day policy.
- Advance notice of absent principals.
- Lounge/eating area problem.
- Revision of travel expense policies.
- Budget cuts/moratorium.
- Environment.
- Facilities needed.
- Staff recognition/morale.
- Class size/workload.
- Mainstreaming.
- Curriculum concerns.
- District reorganization.
- Number and location of phones.
- Professional leaves for educational conferences.
- School cleanliness.
- Pairing of staff.
- Absenteeism.
- Health insurance cost containment.
- Late fall opening/early spring closing of library.
- Early arrival of students at school.
- Abusive language.
- Building plans/bond issues or Referendums.
- Assignment of student teachers.
MEET AND CONFER AT A GLANCE

ISSUE

Is this a term and condition of employment (PELRA)?
179A.03 Subd. 19,
179A.06 Subd. 5 &
179A.07 Subd. 2

YES

NO

Is this issue addressed in our contract?

YES

NO

Not Meet & Confer

Meet & Confer

Other Options?
Member Rights
Unrequested Leave of Absence/Non-Renewal

For all districts except Duluth, Minneapolis, Rochester and St. Paul.
TABLE OF CONTENTS

Teacher Continuing Contract and Seniority Rights ................................................................. 2
Are You a Probationary Teacher? ........................................................................................ 3
Are You a Continuing Contract Teacher? ............................................................................ 4
Unrequested Leave of Absence (ULA)/Non-Renewal ......................................................... 5
Other Considerations ........................................................................................................ 7
Due Process Rights in a ULA/Non-Renewal Meeting ......................................................... 7
Sample Letters ................................................................................................................... 8
Reemployment Insurance Information .................................................................................. 15
Resource Information ....................................................................................................... 16
Minnesota WorkForce Center Contact Information ......................................................... 17
Investigative Form ............................................................................................................. 20

RULE NO. ONE
DO NOT VOLUNTARILY RESIGN

RULE NO. TWO
DO NOT VOLUNTARILY
ACCEPT A REDUCED CONTRACT

RULE NO. THREE
WHEN IN DOUBT, CONTACT YOUR
EDUCATION MINNESOTA FIELD OFFICE
Teacher Continuing Contract and Seniority Rights

When a School District begins reducing teaching positions, there is a great deal of concern about the unrequested leave of absence (ULA)/Non-Renewal process and the rights of individual teachers. If you have questions about seniority or the ULA/Non-Renewal process: Contact your Local President or your Member Rights Advocate for assistance!

- **Do not voluntarily resign.** This is important for probationary as well as continuing contract teachers. Resigning could jeopardize your eligibility for unemployment compensation benefits. Resigning permanently severs your relationship with the School District. By resigning, you are forfeiting any right you might have to be recalled to an open position.

- **Do not voluntarily reduce your work time** (i.e., full-time to half-time). This could jeopardize your right to be recalled to the full extent of your position.

- It is possible for probationary teachers to simply have their contracts non-renewed. Written notification of non-renewal must occur before July 1. If you are notified that your contract is non-renewed, immediately contact your Local President or Member Rights Advocate for assistance.

- Written notification is required when a School District proposes to place a continuing contract teacher on ULA. The teacher then has a 14-day window to request a hearing challenging the proposal.

- Don’t assume that the information you receive from the District is accurate or complete. If you received notification about non-renewal or ULA/Non-Renewal, don’t wait and don’t resign – protect your rights under your contract and state statute by immediately contacting your Local President or Member Rights Advocate for assistance.

- If you are placed on ULA, it is in your best interest to monitor School Board action over the summer months. Watch for open positions and assert your right to be recalled to any position for which you are licensed. Contact your Local President or Member Rights Advocate if you believe your recall rights have been violated. Any violation of your recall rights must be challenged within 60 days.
Are you a probationary teacher?

Minneapolis Statute 122A.40 states:
Subd. 5. Probationary Period. The first three consecutive years of a teacher’s first teaching experience in Minnesota in a single School District shall be deemed to be a probationary period of employment, and after completion thereof, the probationary period in each School District in which the teacher is thereafter employed shall be one year.

It should be noted that:
• Any licensed teacher—full-time, part-time (even one hour a day), Title I, etc.—can earn continuing contract status. The exceptions are Early Childhood-Family Education and Community Education (ECFE), and Adult Basic Education (ABE) teachers.

• Time spent as a long-term substitute may be eligible toward achieving continuing contract status if the teacher works an entire school year to replace a single teacher.

• A probationary teacher must complete at least 120 days of teaching service each year during a probationary period. Days devoted to parent-teacher conferences, teachers’ workshops, and other staff development opportunities and days on which a teacher is absent from school do not count as days of teaching service under this section.

• Unless the contract specifies otherwise, probationary teachers do not hold seniority over other probationary teachers.

• A teacher who has completed three consecutive years in a Minnesota School District, must serve only a one-year probationary period in any other Minnesota School District (except in Duluth, Minneapolis, Rochester and St. Paul).

• The District must give teachers in their final year of probation written notice before July 1, stating that their contract is being nonrenewed. If such a notice is not received, the teacher automatically has a contract for the next year and is no longer probationary.

• A teacher whose first three years of consecutive employment are interrupted for active military service and who promptly resumes teaching under federal reemployment guidelines is considered to have a consecutive teaching experience.

• A teacher whose first three years of consecutive employment are interrupted for maternity, paternity, or medical leave and who resumes teaching within 12 months of when the leave began is considered to have consecutive teaching experience.

Other rights and protections for probationary teachers
• A probationary teacher may request the reasons for his/her termination from the School Board. Consult with your Local President or Member Rights Advocate before taking this action. (See sample letter #4)

• Probationary teachers may be placed on Unrequested Leave of Absence if such a practice is allowed by the contract and is acceptable to the School District. Ask if this is the practice in your School District.

• Begin your preparation to search for a new position by collecting written recommendations from your immediate supervisor and other professionals who have first-hand knowledge of your teaching performance.
Are you a continuing contract teacher?¹

Minnesota statute allows School Districts to place teachers on unrequested leave of absence for one of four reasons: discontinuance of position, lack of pupils, merger of classes caused by consolidation of Districts and/or financial limitations. The Statute also contains a default procedure for dealing with layoffs. However, during the 2017 legislative session, legislation was passed that eliminates the statutory ULA process as of July 1, 2019 and obligates school districts and exclusive representatives to negotiate a plan providing for ULA.

The default ULA procedure set forth in Minn. Statute § 122A.40, Subd. 11 is applicable for the 2018-19 school year. Check your contract first for specific language about Unrequested Leave of Absence procedures. If a contract is silent about any or all of the procedures, then the statutory provisions must be followed. Beginning in the 2019-20 school year, ULA procedure will be solely governed by the ULA provisions in the collective bargaining agreement.

Minnesota Statute 122A.40, (Subd. 11) specifies:

• No continuing contract teacher may be placed on unrequested leave of absence while any probationary teachers with like licenses are retained in a position for which the continuing contract teacher is properly licensed.

• Continuing contract teachers are placed on unrequested leave of absence in the inverse order in which they were employed in the fields in which they are licensed.

Other rights and protections for continuing contract teachers

• Continuing contract teachers accrue seniority in all areas for which they are licensed for the entire number of years of continuous employment in the District, unless your contract provides otherwise.

• A teacher’s seniority date is their first day of actual service in the District, unless your contract specifies a different date.

• Part-time teachers accrue a full year of seniority for each year of continuous employment in the District, unless your contract provides otherwise.

• In the case of equal seniority, see your contract for the tie-breaking procedure to be used.

• A School District might have to realign teachers in order to retain the most senior teacher. Check your contract for realignment procedures.

Continuing contract teachers have recall rights

• Continuing contract teachers are recalled in the inverse order of placement on unrequested leave of absence. Teachers are on recall for a period of five years, unless your contract has other specifications.

• A teacher can be recalled to any position for which he/she is licensed, unless your contract has other specifications.

• Teachers who acquire a new license should immediately notify the school district and request reinstatement if there is a vacant position. (See sample letter #3)

• No new teacher may be hired while there is a teacher on unrequested leave of absence who is licensed to fill a vacancy.
What should a teacher on recall do?

1. Monitor School Board meetings during the summer. If a position becomes available, make sure you are recalled. If not, you have only a 60-day window to challenge the School Board’s actions. Contact your Local President/MRA and Field Staff immediately.

2. By April 1st of each year, send a letter to the School District requesting reinstatement, unless your contract identifies a different date. Notify the School District about any changes in your license immediately. (See sample letter #3)

3. Make sure the school district has your current mailing address on file. If the School District can’t find you, then it has no obligation to recall you.

4. Maintain your Education Minnesota membership. You are not required to maintain membership while on ULA/Non-Renewal for the local union to enforce the terms and conditions of the collective bargaining agreement on your behalf. However, membership includes your right to legal services if you need them for a statutory recall challenge, a MDE complaint or licensure matter. http://www.educationminnesota.org/en/membership.aspx

5. Send a letter prior to April 1st of each year requesting reinstatement, unless your contract identifies a different date. Keep a copy of the letter for your file. You may teach in another District, substitute teach or change occupations and not forfeit your recall rights.

6. If you are recalled, you have 30 days to accept the offered position, unless your contract identifies a different number of days. (See sample letter #6)

ULA Procedure

1. The board must meet and pass a resolution proposing that you be placed on unrequested leave of absence.

2. You must receive a letter from the District stating:
   - You are being proposed for ULA and why
   - One or more of the following reasons must be listed:
     - Discontinuance of position
     - Lack of pupils
     - Merger of classes caused by consolidation of districts
     - Financial limitations

3. Immediately Contact your Member Rights Advocate for assistance if you receive notice of ULA/Non-Renewal.

---

1 Teachers who teach in Duluth, Minneapolis, Rochester and St. Paul (cities of the first class) are covered by a different statute, Minn. Stat. 122A.43. Teachers who teach in Duluth, Minneapolis, Rochester and St. Paul have “tenure” rights, rather than “continuing contract” rights.
Request for a Hearing

1. You have the right to request a hearing on the School Board’s proposal to place you on ULA. You have fourteen (14) calendar days from the time you receive your letter to submit a written request for a ULA hearing. The request for a hearing must come from the individual teacher – your local can’t do this for you. (See sample letter #2)

2. Your request for a hearing should be personally delivered or sent via certified mail to any member of your local school board – preferably the Board Chairperson or Clerk. Document the notification by having the School Board Member sign a receipt for the delivery or have a qualified adult (not your spouse or other relative) witness the notification. Check your contract for language about notification.

3. If you receive a letter with a pre-set hearing date – contact your Member Rights Advocate.

4. Requesting a hearing will maintain the timeline for preserving your rights. There are many possible reasons to challenge a School District’s ULA procedure. Contact your Field Staff for assistance in determining if there are legal grounds for such a challenge. The hearing must be before a neutral hearing officer with a court reporter present. The Board pays for both the hearing officer and the reporter, as well as for their attorney who represents them in this matter. You may withdraw your request for a hearing at any time prior to the hearing date.

5. There is no date given in the statute that specifies a date by which a District must send a proposed Unrequested Leave of Absence letter to a teacher, but all these procedures must be completed prior to JULY 1st.

6. In some cases, facts may change after the fourteen (14) day timeline has passed. If the changed circumstances could result in a challenge to your placement on ULA, the timeline may restart. Contact your Field Staff for help.

7. Education Minnesota will advise you regarding the legal feasibility of a ULA hearing. Work with your Member Rights Advocate and Field Staff to determine the best course of action for your individual situation.

Resignation or Voluntary Reduction of Contract

If you are asked to resign or reduce your contract – contact your Member Rights Advocate or Field Staff for assistance.

ABOVE ALL – DO NOT RESIGN!!

If you resign, you forfeit:

- Your right to be recalled.
- Your seniority as a full-time teacher in the District.
- And possibly your unemployment compensation.

And at that point there is nothing anyone can do to help you.
**Other Considerations**

*Fringe Benefits:*
Medical, dental, disability, and term life insurance, or other benefits, are deferred benefits that you have already earned. You may be covered up to the beginning of the new school year. Check your contract for specific language.

The School District is legally required to notify you in writing about your COBRA rights.

This law allows you to carry your insurance another 18 months beyond the expiration date of the insurance by paying the full premium yourself (state and federal insurance laws).

**Due Process Rights in a ULA Hearing**

- A hearing can include you and any other teachers proposed for ULA depending on the desire of the School Board.

- You will usually be represented by a staff person, either a Field Staff person or an attorney, depending on the issue.

- The administration has the “burden of proof.” That is, it has to prove to the Board that your ULA is justified for one of the four reasons.

- The hearing is formal, witnesses are sworn in, there is direct and cross-examination of witnesses and all necessary documents should be received as exhibits.

- The hearing officer will issue his/her recommendations to the School Board. The Board has the right to either accept or reject the recommendations of the hearing officer.

- The hearing must be recorded (court reporter transcript available should there be an appeal). The School District is responsible for paying for the recording of the hearing.

- The ULA proceedings must be concluded and you must be notified in writing that you are placed on unrequested leave prior to July 1st, unless both sides agree to waive the July 1 timeline or unless a different deadline is identified in the contract.

- In some circumstances, the Board’s decision can be appealed to the Minnesota Court of Appeals. The judges review the evidence from the hearing and listen to arguments from counsel for each side. The judges then affirm or reverse the Board’s decision.
# ULA or NON-RENEWAL SAMPLE LETTERS

## Continuing Contract and Probationary Teachers

<table>
<thead>
<tr>
<th>Sample</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Full-time teacher placed on ULA and accepting a part-time contract</td>
</tr>
<tr>
<td>#2</td>
<td>Continuing contract teacher requesting a hearing</td>
</tr>
<tr>
<td>#3</td>
<td>Letter to be sent to the District by April 1 from teachers on ULA</td>
</tr>
<tr>
<td>#4</td>
<td>Probationary teacher’s request for reasons for nonrenewal</td>
</tr>
<tr>
<td>#5</td>
<td>Rejection of reduced contract</td>
</tr>
<tr>
<td>#6</td>
<td>Letter accepting a recall offer</td>
</tr>
</tbody>
</table>
SAMPLE LETTER #1

Full-Time Teacher Placed on ULA and Accepting a Part-Time Position

______________________Date

___________________________, Chairperson
Board of Education
Independent School District No.__________
_____________________________________
_____________________________________
___________________________, MN _____

Dear Mr./Ms. ________________________:

I am accepting the __________________(position fraction, i.e., 1/2)
______________________ teaching position with Independent School District No.
_______ for the 20____ - 20____ school year.

My acceptance of this position should not be considered a waiver of my continuing contract rights guaranteed by Minnesota Statutes for reinstatement to any full-time position for which I am licensed or to additional part-time positions which restore me to a 1.0 teaching position.

Sincerely,

_____________________________________

(Signature)

cc:
__________________________, Superintendent
__________________________, Education Minnesota Field Staff
__________________________, Member Rights Advocate
__________________________, Local President

(Please retain a copy for your professional file)
SAMPLE LETTER #2

Personally deliver this letter to a Board Member with either a witness or a signed receipt to verify delivery OR send via certified mail with return receipt requested.

**Continuing Contract Teacher Requesting a Hearing on Proposed Unrequested Leave of Absence**

______________________ Date

_______________________________, Board Member

Board of Education
Independent School District No. ______

_________________________________

_________________________________

_______________________, MN______

Dear Mr./Ms. ________________________:

I hereby request a public hearing on the Board's proposal to terminate my employment and place me on Unrequested Leave of Absence pursuant to M.S. 122A.40.

I will be represented at the hearing by Education Minnesota. Please contact my representative to arrange a mutually acceptable hearing date. His/Her address and phone number follow:

_______________________________, Education Minnesota Field Staff

_______________________________ Field office address and phone number

Sincerely,

_________________________________

cc:

__________________________, Superintendent

__________________________, Education Minnesota Field Staff

__________________________, Local President

(Retain a copy for your professional file)
SAMPLE LETTER #3

Check your contract for required notification date.
If no date is specified, April 1 is the deadline.

Annual Request for Reinstatement

____________________ Date

_________________________________, Board Chairperson
Board of Education
Independent School District No. _____________
________________________________________
____________________________, MN ________

Dear Mr./Ms. ________________________:
In compliance with M.S. 122A.40, Subd. 11, and the existing Master Contract, I wish to
notify District No. _____________ that I am prepared to return to work as a teacher for
the 20__ - 20__ school year.
I have had no change in licensure. (If the teacher has added credits or added another
license, BE SURE to mention this here instead of the previous statement.)
Please send me any notices of current openings for which I am eligible for recall.
Thank you.
Sincerely,
________________________________
(Signature)
________________________________
(Current Address)

cc:
_________________________________, Superintendent
_________________________________, Education Minnesota Field Staff
_________________________________, Local President

(Retain a copy for your professional file)
SAMPLE LETTER #4

Consult with Field Staff before sending this letter

Probationary Teacher-Request for Reasons for Nonrenewal

_________________________ Date

_________________________, Board Chairperson
Board of Education
Independent School District No. __________
__________________________, MN __________

Dear Mr./Ms. ____________________:

According to the letter I received from ____________________________________________
__ on __________________, my contract will not be renewed for the school year 20____-
20____ with Independent School District No. __________.

Under Minnesota Statute No. 122A.40, Subd. 5, the School Board shall give any teacher
whose contract it declines to renew for the following school year written notice to that
effect before July 1. If the teacher requests reasons for any nonrenewal of a teaching
contract, the School Board shall give the teacher its reason in writing within ten (10) days
after receiving such request.

I hereby request the reasons that my contract is not being renewed.

Sincerely,

________________________________
(Signature)

________________________________
(Current Address)

cc: ____________________________, Superintendent
______________________________, Education Minnesota Field Staff
______________________________, Local President

(Retain a copy for your professional file)
SAMPLE LETTER #5

*Make sure that your contract language gives you the right to decline a part-time position and that you are not waiving any rights to future before you send this letter.

**Rejection of Reduced Contract Accepting Unrequested Leave Status**

_______________________ Date

___________________________, Chairperson

Board of Education

Independent School District No. ___________

_____________________________________

_____________________________________  

___________________________, MN _____

Dear Mr./Ms. ________________________:

I have been offered a ________________ (insert fraction of time, i.e., 1/3) __________- 
time position in ________________ (subject) __________ to teach in District No. ___

for the school year 20____ - 20____.

With regret, I decline the ________________ (insert fraction of time, i.e., 1/3) _______ 
and accept placement on unrequested leave of absence. I understand that under Minnesota 
Statute 122A.40, I am entitled to five (5) years of recall rights and that I am obligated to 
inform you of my desire to return each year by April 1st.

I have enjoyed my teaching experience with the _________________________________ 
School District and hope that I can return to employment here soon.

Sincerely,

_____________________________  

(Signature)

cc: __________________________, Superintendent  

_____________________________, Education Minnesota Field Staff  

_____________________________, Local President

(Retain a copy for your professional file)
SAMPLE LETTER #6

*Make sure that your contract language gives you the right to decline a part-time position and that you are not waiving any rights to future before you send this letter.

Accepting Recall Offer

______________ Date

______________, Chairperson
Board of Education
Independent School District No. _________
____________________________________
____________________________________
_______________, MN ______

Dear Mr./Ms. ________________________:

I have received a recall notice for a _____ F.T.E. position in ____________________ (subject) ________ in District No. ____________ for the school year 20____ - 20_____.

I am accepting the ____F.T.E. teaching position with Independent School District No. _________ for the 20____ - 20_____ school year.

(If the recall is for less than full-time, include the following paragraph...)

My acceptance of this position should not be considered a waiver of my continuing contract rights guaranteed by Minnesota Statutes for reinstatement to any full-time position for which I am licensed or to additional part-time positions which restore me to a 1.0 teaching position.

Sincerely,

_____________________________
(Signature)

cc:
__________________________, Superintendent
__________________________, Education Minnesota Field Staff
__________________________, Local President

(Retain a copy for your professional file)
UNEMPLOYMENT INSURANCE/ WORKFORCE CENTER INFORMATION

The following is information that eligible teachers should be aware of in regard to filing for Unemployment Insurance this year:

1. Teachers who have been terminated or placed on unrequested leave are eligible immediately after the school term has been completed. Drawing summer checks does not remove eligibility. Individuals may not apply until they are out of work (end of school year).

2. Be aware resignation may impact eligibility. Determination is on a case-by-case basis.

3. Unemployment Insurance—where to apply: www.uimn.org or by phone 651-296-3644 (Twin Cities area) or 1-877-898-9090 (Greater Minnesota). The applicant self-service system is available Monday through Friday, 6:00 am to 6:00 pm.

Call UI Customer Service whenever you have questions about your benefits: Monday through Friday, 8 a.m. to 4:30 p.m.

To talk to a representative:
Enter your Social Security number and password followed by the # sign (if you do not have a benefit account press 2 after you enter your Social Security number, then press 0);

1. Press 2 for other options;
2. Press 3 for answers to commonly asked questions or to speak with a representative;
3. Press 0 to speak to a representative.

4. Information needed for filing:
   a) Social Security Number
   b) Name of employer - School District Number
   c) Letter of termination or unrequested leave letter
   d) Drivers license number or other state government ID number
   e) Employment History for the past 18 months
   f) Union name/number
   g) Bank account number-if choosing direct deposit
   h) Mailing address, telephone number, birth date
   i) If you were in the military in the last 18 months, you will need information from your DD-214 member 4

*see How to Apply for Unemployment Insurance Benefits brochure

http://www.uimn.org/ui/HowToApplyForUI.pdf
WorkForce Centers
(There are offices throughout the state. Call 1-888-438-5627 for more information or the website to access is www.mnworkforcecenter.org.)

See attached Minnesota WorkForce Center Contact Information list.

RESOURCE INFORMATION

Bridge to Benefits Minnesota
http://mn.bridgetobenefits.org/Home2.html

Bridge to Benefits is a multi-state project by Children’s Defense Fund Minnesota to improve the well-being of families and individuals by linking them to public work support programs and tax credits.

Dislocated Worker Programs
www.PositivelyMinnesota.com/dw

The Dislocated Worker Program offers free services to help eligible individuals find suitable re-employment—and help take the stress and uncertainty out of the process.

Internet System for Education and Employment Knowledge (ISEEK)
www.iseek.org

ISEEK is an internet system for education and employment information. It links to information on school programs, training, occupations, skill requirements and job openings.

Minnesota Works
www.MinnesotaWorks.net

You will be able to upload or copy and paste resumes into Minnesota-Works.net and job shoppers will be able to place their top jobs in a ‘shopping cart.’ You will also be able to: See a list of the jobs applied for online; save job orders to a list for reviewing later; and, maintain multiple resumes.
# List of Minnesota WorkForce Center Contact Information

*indicates the WorkForce Center is located on a Minnesota State Colleges and Universities campus

<table>
<thead>
<tr>
<th>WorkForce Center Name</th>
<th>Address</th>
<th>City</th>
<th>ZIP Code</th>
<th>Phone</th>
<th>Fax</th>
<th>TTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anoka County</td>
<td>Anoka County Human Services Building 1201 89th Avenue NE, Suite 235</td>
<td>Blaine</td>
<td>55434-3372</td>
<td>763.783.4800</td>
<td>763.783.4814</td>
<td>763.785.5987</td>
</tr>
<tr>
<td>Dakota County - West St. Paul</td>
<td>1 Mendota Road W, Suite 170</td>
<td>West St Paul</td>
<td>55118</td>
<td>651.554.5955</td>
<td>651.554.6565</td>
<td>651.554.5914</td>
</tr>
<tr>
<td>Dakota County - Burnsville</td>
<td>Southcross Commerce Center IV 2900 W County Road 42, Suite 140</td>
<td>Burnsville</td>
<td>55337</td>
<td>952.895.7600</td>
<td>952.895.7660</td>
<td>952.895.7661</td>
</tr>
<tr>
<td>Hennepin North</td>
<td>7225 Northland Drive</td>
<td>Brooklyn Park</td>
<td>55428</td>
<td>763.279.4400</td>
<td>763.536.6001</td>
<td>763.536.6006</td>
</tr>
<tr>
<td>Hennepin South</td>
<td>4220 Old Shakopee Road W</td>
<td>Bloomington</td>
<td>55437-2949</td>
<td>952.346.4000</td>
<td>952.346.4042</td>
<td>952.346.4043</td>
</tr>
<tr>
<td>Minneapolis North</td>
<td>1200 Plymouth Avenue N</td>
<td>Minneapolis</td>
<td>55411-4085</td>
<td>612.520.3500</td>
<td>612.520.3530</td>
<td>612.302.7061</td>
</tr>
<tr>
<td>Minneapolis South</td>
<td>777 E Lake Street</td>
<td>Minneapolis</td>
<td>55407-1546</td>
<td>612.821.4000</td>
<td>612.821.4014</td>
<td>612.821.4013</td>
</tr>
<tr>
<td>Ramsey County - North St Paul</td>
<td>2098 11th Avenue E</td>
<td>North St Paul</td>
<td>55109-5100</td>
<td>651.779.5666</td>
<td>651.779.5646</td>
<td>651.779.5223</td>
</tr>
<tr>
<td>Ramsey County - St Paul</td>
<td>540 Fairview Ave N</td>
<td>St Paul</td>
<td>55104</td>
<td>651.642.0363</td>
<td>651.642.0706</td>
<td>651.642.0679</td>
</tr>
<tr>
<td>Scott County</td>
<td>752 Canterbury Road S</td>
<td>Shakopee</td>
<td>55379</td>
<td>952.445.7087</td>
<td>952.403.7995</td>
<td>952.403.7999</td>
</tr>
<tr>
<td>Washington County Cottage Grove</td>
<td>13000 Ravine Parkway South</td>
<td>Cottage Grove</td>
<td>55016-6102</td>
<td>651.430.4162</td>
<td>651.430.4157</td>
<td>Use MN Relay - 711</td>
</tr>
<tr>
<td>Washington County Forest Lake</td>
<td>19955 Forest Road North</td>
<td>Forest Lake</td>
<td>55025-9733</td>
<td>651.275.7265</td>
<td>651.275.7266</td>
<td>Use MN Relay - 711</td>
</tr>
<tr>
<td>Washington County Woodbury</td>
<td>2150 Radio Drive</td>
<td>Woodbury</td>
<td>55125</td>
<td>651.275.8650</td>
<td>651.275.8682</td>
<td>651.275.8653</td>
</tr>
<tr>
<td>WorkForce Center Name</td>
<td>Address</td>
<td>City</td>
<td>ZIP Code</td>
<td>Phone</td>
<td>Fax</td>
<td>TTY</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------</td>
<td>--------------</td>
<td>----------</td>
<td>-------------</td>
<td>-------------</td>
<td>------------</td>
</tr>
<tr>
<td>Albert Lea</td>
<td>Skyline Mall 1649 W Main St</td>
<td>Albert Lea</td>
<td>56007-1868</td>
<td>507.379.3409</td>
<td>507.379.3413</td>
<td>507.379.3409</td>
</tr>
<tr>
<td>Alexandria</td>
<td>303 22nd Avenue W, Suite 107</td>
<td>Alexandria</td>
<td>56308</td>
<td>320.762.7800</td>
<td>320.762.7530</td>
<td>320.762.7805</td>
</tr>
<tr>
<td>Austin *</td>
<td>Riverland Community College 1500 8th Ave NW</td>
<td>Austin</td>
<td>55912-1400</td>
<td>507.433.0555</td>
<td>507.433.0591</td>
<td>507.433.0556</td>
</tr>
<tr>
<td>Bemidji</td>
<td>616 America Avenue NW, Suite 210</td>
<td>Bemidji</td>
<td>56601</td>
<td>218.333.8200</td>
<td>218.755.4458</td>
<td>218.755.4422</td>
</tr>
<tr>
<td>Brainerd</td>
<td>204 Laurel Street, Suite 21</td>
<td>Brainerd</td>
<td>56401</td>
<td>218.828.2450</td>
<td>218.828.6194</td>
<td>218.855.5030</td>
</tr>
<tr>
<td>Cambridge</td>
<td>Cambridge City Center 140 Buchanan St N, Suite 152</td>
<td>Cambridge</td>
<td>55008</td>
<td>763.279.4492</td>
<td>763.889.7140</td>
<td>218.889.7140</td>
</tr>
<tr>
<td>Cloquet</td>
<td>715 Croquet Avenue</td>
<td>Cloquet</td>
<td>55720-1629</td>
<td>218.878.4414</td>
<td>218.878.4409</td>
<td>218.878.4414</td>
</tr>
<tr>
<td>Crookston</td>
<td>1730 University Avenue</td>
<td>Crookston</td>
<td>56716-1112</td>
<td>218.281.6020</td>
<td>218.281.6025</td>
<td>218.281.20</td>
</tr>
<tr>
<td>Detroit Lakes</td>
<td>Roosevelt Building 801 Roosevelt Avenue</td>
<td>Detroit Lakes</td>
<td>56501-3703</td>
<td>218.846.7379</td>
<td>218.846.0773</td>
<td>218.846.0772</td>
</tr>
<tr>
<td>Duluth</td>
<td>Government Services Center 320 W 2nd Street, Suite 205</td>
<td>Duluth</td>
<td>55802</td>
<td>218.723.4730</td>
<td>218.723.4734</td>
<td>218.723.4725</td>
</tr>
<tr>
<td>Fairmont</td>
<td>412 South State Street</td>
<td>Fairmont</td>
<td>56031</td>
<td>507.235.5518</td>
<td>507.238.4214</td>
<td>507.235.5518</td>
</tr>
<tr>
<td>Faribault</td>
<td>Faribo Town Square 201 Lyndale Avenue S, Suite 1</td>
<td>Faribault</td>
<td>55021-5758</td>
<td>507.333.2047</td>
<td>507.332.5487</td>
<td>507.333.2047</td>
</tr>
<tr>
<td>Fergus Falls</td>
<td>Lincoln Center 125 W Lincoln Avenue, Suite 1</td>
<td>Fergus Falls</td>
<td>56537</td>
<td>218.739.7560</td>
<td>218.739.7496</td>
<td>218.739.7287</td>
</tr>
<tr>
<td>Grand Rapids</td>
<td>Itasca Resource Center 1215 SE 2nd Avenue</td>
<td>Grand Rapids</td>
<td>55744-3982</td>
<td>218.327.4480</td>
<td>218.327.4179</td>
<td>218.327.4480</td>
</tr>
<tr>
<td>Hibbing</td>
<td>3920 13th Avenue E</td>
<td>Hibbing</td>
<td>55746-3675</td>
<td>218.262.6777</td>
<td>218.262.7316</td>
<td>218.262.6777</td>
</tr>
<tr>
<td>Hutchinson *</td>
<td>Ridgewater College 2 Century Avenue SE</td>
<td>Hutchinson</td>
<td>55350-0550</td>
<td>320.587.4740</td>
<td>320.234.7769</td>
<td>320.587.4740</td>
</tr>
<tr>
<td>International Falls *</td>
<td>Rainy River Community College 1501 Highway 71, SC 128</td>
<td>International Falls</td>
<td>56649</td>
<td>218.283.9427</td>
<td>218.283.4042</td>
<td>218.283.9427</td>
</tr>
<tr>
<td>Litchfield</td>
<td>Meeker County Family Services Building 114 N Holcombe Avenue, Suite 170</td>
<td>Litchfield</td>
<td>55355-2273</td>
<td>320.693.2859</td>
<td>320.693.9146</td>
<td>320.693.2859</td>
</tr>
<tr>
<td>WorkForce Center Name</td>
<td>Address</td>
<td>City</td>
<td>ZIP Code</td>
<td>Phone</td>
<td>Fax</td>
<td>TTY</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------</td>
<td>------</td>
<td>----------</td>
<td>-------</td>
<td>-----</td>
<td>-----</td>
</tr>
<tr>
<td>Little Falls</td>
<td>Coborns Complex 315 12th Street NE</td>
<td>Little Falls</td>
<td>56345-2910</td>
<td>320.616.2400</td>
<td>320.616.2424</td>
<td>800.627.3529</td>
</tr>
<tr>
<td>Mankato</td>
<td>Mankato Place 12 Civic Center Plaza, Suite 1600A</td>
<td>Mankato</td>
<td>56001-7796</td>
<td>507.389.6723</td>
<td>507.389.2708</td>
<td>507.389.6512</td>
</tr>
<tr>
<td>Marshall</td>
<td>Lyon County Courthouse 607 W Main Street</td>
<td>Marshall</td>
<td>56258</td>
<td>507.537.6236</td>
<td>507.537.6362</td>
<td>507.537.6237</td>
</tr>
<tr>
<td>Montevideo</td>
<td>202 North 1st Street</td>
<td>Montevideo</td>
<td>56265</td>
<td>320.269.8819</td>
<td>320.269.5696</td>
<td>320.269.8819</td>
</tr>
<tr>
<td>Monticello</td>
<td>406 E 7th St PO Box 720</td>
<td>Monticello</td>
<td>55362-0720</td>
<td>763.271.3700</td>
<td>763.271.3701</td>
<td>763.271.3745</td>
</tr>
<tr>
<td>Moorhead</td>
<td>Clay County Family Service Center 715 11th Street N, Suite 302</td>
<td>Moorhead</td>
<td>56560-2086</td>
<td>218.287.5060</td>
<td>218.299.5871</td>
<td>218.236.2206</td>
</tr>
<tr>
<td>Mora</td>
<td>903 Forest Avenue E</td>
<td>Mora</td>
<td>55051-1431</td>
<td>320.679.6484</td>
<td>320.679.6495</td>
<td>320.679.6494</td>
</tr>
<tr>
<td>New Ulm</td>
<td>1618 S Broadway Street</td>
<td>New Ulm</td>
<td>56073-3756</td>
<td>507.354.3138</td>
<td>507.354.6997</td>
<td>507.354.3138</td>
</tr>
<tr>
<td>Owatonna</td>
<td>631 Cedar Avenue N</td>
<td>Owatonna</td>
<td>55060</td>
<td>507.446.1470</td>
<td>507.446.1480</td>
<td>507.446.1470</td>
</tr>
<tr>
<td>Red Wing</td>
<td>1606 W Third Street</td>
<td>Red Wing</td>
<td>55066</td>
<td>651.385.6480</td>
<td>651.385.6484</td>
<td>651.385.6404</td>
</tr>
<tr>
<td>Rochester</td>
<td>300 11th Avenue NW, Suite 112</td>
<td>Rochester</td>
<td>55901</td>
<td>507.285.7315</td>
<td>507.280.5523</td>
<td>507.280.3584</td>
</tr>
<tr>
<td>St. Cloud *</td>
<td>1542 Northway Drive, Door 2 PO Box 67</td>
<td>St Cloud</td>
<td>56302-0067</td>
<td>320.308.5320</td>
<td>320.308.5173</td>
<td>320.308.6434</td>
</tr>
<tr>
<td>Thief River Falls *</td>
<td>1301 Highway 1 E</td>
<td>Thief River Falls</td>
<td>56701-2500</td>
<td>218.681.0909</td>
<td>218.681.0913</td>
<td>Use MN Relay - 711</td>
</tr>
<tr>
<td>Virginia</td>
<td>Olcott Plaza 820 N 9th Avenue, Suite 250</td>
<td>Virginia</td>
<td>55792-2345</td>
<td>218.748.2200</td>
<td>218.748.2288</td>
<td>218.748.2222</td>
</tr>
<tr>
<td>Wadena</td>
<td>124 1st Street SE, Suite 2</td>
<td>Wadena</td>
<td>56482-1538</td>
<td>218.631.7660</td>
<td>218.631.7676</td>
<td>218.631.7677</td>
</tr>
<tr>
<td>Willmar</td>
<td>Kandiyohi County Health and Human Service Building 2200 23rd Street NE, Suite 2040</td>
<td>Willmar</td>
<td>56201-9423</td>
<td>320.441.6590</td>
<td>320.231.6054</td>
<td>Minnesota Relay System 711</td>
</tr>
<tr>
<td>Winona *</td>
<td>Minnesota State College - Southeast Technical 1250 Homer Road, Suite 200</td>
<td>Winona</td>
<td>55987-4897</td>
<td>507.453.2920</td>
<td>507.453.2960</td>
<td>507.453.2930</td>
</tr>
<tr>
<td>Worthington</td>
<td>318 9th Street</td>
<td>Worthington</td>
<td>56187-2342</td>
<td>507.376.3116</td>
<td>507.376.3630</td>
<td>507.376.3116</td>
</tr>
</tbody>
</table>

©2010 Minnesota Department of Employment and Economic Development
Unrequested Leave of Absence (ULA) / Non-Renewal Investigative Form – for Teachers

Name: 

School: 

Home phone: 

Email: 

Are you a member of Education Minnesota?  Yes _____  No _____

Are you a full-time or part-time teacher?  Full-time _____  Part-time _____ %

Describe your position/title – attach a current schedule if available:

__________________________________________________________

__________________________________________________________

Are you a probationary or a continuing contract teacher? 

Beginning date of service:  Any breaks in service? 

Teaching experience in another Minnesota School District?  If yes, # of years 

Where: 

What are you licensed to teach? 

Checked seniority list?  Listed correctly? 

Date of written notification of ULA/Non-Renewal 

Date hearing requested 

Other 

Note to MRA – attach the following documents to this form:

1. Copy of this teacher’s license – from the website: http://education.state.mn.us
2. Copy of any letters this teacher has received from the School District about ULA/Non-Renewal
3. Copy of School Board minutes referencing this teacher
4. Any documents relating to placement on ULA or Non-Renewal
5. Copy of letter requesting a hearing
6. Seniority list and licensing areas
7. Contract
8. Current teaching assignments
Why build a robust union orientation process?

Our union’s strength comes from our ability to be there for each other and stand up for meaningful improvements for students, our profession, public education and our communities. Providing an effective orientation process can have a lasting impact on the strength of unions.

Strong locals have a culture of joining and ask new hires to be active members of the union from day one. A high-quality union orientation connects new hires with support in a demanding profession, builds authentic connections and stronger relationships and provides opportunities for new hires to be heard.

New hires who participate in a union orientation program, and find it helpful, are much more committed to the union than new hires who do not participate in union orientation. Moreover, that high level of commitment to the union continues after year one.

When more educators opt in to their union, they have more power at the bargaining table and in policymaking at the local, state and national levels. Our collective voice allows us to advocate for our profession and the public schools our students deserve.

This booklet will help you prepare and plan a continuous new hire orientation and recruitment process. The first section helps you design a yearlong process to orient and engage your new members with a sample calendar. The later sections focus on the welcome meeting, follow up ideas for connections with new members and ongoing recruitment strategies for potential members.

New Hires Who Attend a “Helpful” Orientation …

- Are more likely to volunteer for the union.
- Are more loyal union members.
- Feel greater responsibility toward the union.
Best practices for new hire orientation process

New educators are excited to start their new jobs, and our union orientation process should reflect that excitement and be the starting point for continuous support and engagement throughout their careers. Keep in mind that the quality of the union’s orientation process, both in substance and style, influences member commitment to the union.

☐ Set concrete goals.

- Determine the number of union-sponsored events for the year.
- Diversify your leadership team in advance in order to build a more welcoming local.
- Determine the number of conversations with new hires in the first 90 days. Research suggests a minimum of three in-person contacts in the first 90 days will create a strong union affinity in new hires.
Create informal and formal face-to-face opportunities.
• Informal interactions help identify concerns and allow us to connect individual values to the work of the union.
• Formal interactions help establish an understanding of the purpose of the union and its connection to student success and strong public schools.

Be intentional when choosing the members who connect with new hires.
• Consider the purpose of the meeting and who is the best messenger for the content.
• Include members with a range of cultural and educational experiences.

Track new hire participation.
• Use sign-in sheets at all union-sponsored activities.
• Set up a system to track participation so you know if your plan is working.

Create high-quality, informative materials.
• Use templates and publications from Education Minnesota.
• Provide website and social media information for the union.

Follow up on issues and concerns.
• Build member affinity for the union and confidence in its power.
• Give members opportunities to take action on issues important to them.
EVERY MONTH
Ongoing process for all new hires

☐ Track new hires through HR and via school board minutes.

☐ Ensure building leadership receives lists of all new hires by working with the building secretary to find out who has been newly hired.

☐ Write handwritten notes to new hires inviting them to a union welcome meeting.

☐ Consider home visits to invite new hires to a welcome meeting.

☐ Meet individually with any mid-year hires for individual union orientation.

☐ Highlight new members (with their consent) in local newsletters.

☐ Use the resources from the member of color affinity groups.

☐ Provide opportunities for new members to ask questions about the union.

☐ Follow up on issues and concerns that are important to new hires.

☐ Communicate in a variety of ways with new hires, including text messages and social media.
# New hire member engagement ideas

<table>
<thead>
<tr>
<th>Month</th>
<th>Local Engagement of New Members</th>
<th>State and National Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>▶ Host new hire union welcome meeting.</td>
<td>▶ Summer Seminar</td>
</tr>
<tr>
<td></td>
<td>▶ Site leadership check in on new hires, answer questions and provide a union contacts handout.</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>▶ Follow up individually with each new hire.</td>
<td>▶ Follow Education Minnesota social media on Twitter, Facebook, Pinterest and Instagram.</td>
</tr>
<tr>
<td></td>
<td>▶ Hold a building meeting, thanking new members with union “swag” and answer initial questions about the union.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▶ Invite new hires to union-sponsored homecoming tailgate party.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▶ Intermediate organization PD options (fall drive-ins).</td>
<td></td>
</tr>
<tr>
<td>October</td>
<td>▶ Schedule new member pizza gathering and reinforce union as a support for our profession.</td>
<td>▶ Minnesota Educator Academy Conference</td>
</tr>
<tr>
<td></td>
<td>▶ Attend early voting parties with other members at site.</td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>▶ Organize a fun, social event (paint &amp; sip, brewery tour, etc.) and discuss relevant district policies.</td>
<td>▶ Political Conference (even-numbered years)</td>
</tr>
<tr>
<td></td>
<td>▶ Get Out the Vote Rallies</td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>▶ Invite new members to site-level union cookie social.</td>
<td></td>
</tr>
<tr>
<td>January</td>
<td>▶ Hold Degrees, not Debt presentation and write letters to legislators.</td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>▶ Hold negotiations 101 with new hires and encourage participation in negotiations survey.</td>
<td>▶ Collective Bargaining &amp; Organizing Conference (odd-numbered years)</td>
</tr>
<tr>
<td>March</td>
<td>▶ Share district spring protocols to know in newsletter.</td>
<td>▶ NEA ESP Conference</td>
</tr>
<tr>
<td></td>
<td>▶ Invite new members to attend union action at the school board.</td>
<td>▶ AFT PSRP Conference</td>
</tr>
<tr>
<td>April</td>
<td>▶ Hold social event and discuss how our union can improve new hire support.</td>
<td>▶ Representative Convention</td>
</tr>
<tr>
<td></td>
<td>▶ Invite new members to spring professional development events.</td>
<td></td>
</tr>
<tr>
<td>May</td>
<td>▶ Invite new members to end-of-year union celebration.</td>
<td>▶ Join other educators at the Minnesota State Capitol</td>
</tr>
<tr>
<td></td>
<td>▶ Encourage registration to Summer Seminar.</td>
<td></td>
</tr>
<tr>
<td>June</td>
<td>▶ AFT Teach/Convention</td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>▶ NEA RA</td>
<td></td>
</tr>
</tbody>
</table>
PLANS
The welcome meeting

*Present a positive, substantive introduction to the union*

Despite the proven value of orientations, many local unions do not take advantage of this opportunity to form a positive and ongoing impression. On average, only a little more than one-third of new members participate in a new hire welcome meeting.

It is imperative that a new hire’s introduction to the union be both positive and substantive. Because many new hire union welcome meetings happen during the district’s orientation schedule, and new hires may be feeling overwhelmed, ensure that your welcome meeting is meaningful and engaging to your future members.

☐ *Ensure that your meeting is organized and that all logistics are finalized.*

- Have a sign-in sheet that includes a space for personal email addresses and cellphone numbers.
- Have an agenda prepared and plan what you’re going to say ahead of time.
  - Start with your union story.
  - Introduce the collective bargaining agreement.
  - Discuss what the union does beyond the workplace.
  - Describe and demonstrate how new members can get involved.
  - Make the case for union membership.
Make your meeting fun, comfortable and approachable.

- Use adult-learning strategies that focus on interactive dialogue and active participation.
- Use quality materials through the presentation.
- Stay positive! No horror stories. Speak of the union as a source of solutions.
- Avoid or explain jargon and acronyms.
- Avoid sales pitches. Don’t use member financial benefits as the sole tool to recruit members.
- Ask members to join at the meeting; assume new members want to join. Fill out the application in small groups at tables.
- Make filling out the application as simple as possible by walking through each section.
- Provide food if possible.
- Be transparent about dues and how they are collected. Highlight that the return on investment far outweighs what is paid in dues.
- Anticipate tough questions and be prepared to affirm concerns, answer questions and return the conversation to a message of building collective power.
- Get group, site or individual photos of new hires. Suggest a union selfie with their completed application. Post to social media.

FIGHTING FOR PROFESSIONAL PAY AND ECONOMIC SECURITY FOR ALL
Discuss today’s unionism.

• Connect union values to new hire values.
  • Find out what each new hire values (economic security, racial equity, social justice, robust professional development, respect for the profession, etc.).
  • Highlight the work of the union that aligns with those values (contract negotiations, PD opportunities, work of the Facing Inequities and Racism in Education Program, member of color affinity groups, advocacy at the Legislature, etc.).

• Remember the three frames of unionism.
  • Advocacy for salary and benefits.
  • Advocacy for the profession/professional development.
  • Advocacy for social justice such as anti-racism work, socio-economic justice and gender justice.

• Speak in terms of “we” rather than “the union” as a third party, outside institution.

Listen to new hires.

• Start to build relationships—be intentional about having one-to-one conversations with the new hires at the welcome meeting.

• Create opportunities specific to the needs of people of color, indigenous educators and LGBTQ+ new hires.

• Gather initial input from new hires about their interests, needs and questions—and be sure to follow up on what you hear.

• Build the groundwork for future one-to-one conversations.

Advocating collectively for our profession and high-quality educators
Follow up with potential members

Membership and member engagement are crucial to the work we do. Many of our new hires are stepping into the classroom for the first time and are looking to their more veteran colleagues for tips, advice and guidance. The union can, and should, play a big role in meeting those needs. Additionally, the sooner we engage new members, the more likely they will be committed to the union for their entire career.

Just because new hires do not join at the time of the union welcome meeting does not mean that they will not join. It may take multiple conversations with a potential member to connect the new hire’s values and interests with the value of belonging to the union. It is important to track a potential member’s union affinity through conversations and follow up with them throughout the year. Union leadership should also ask other members, with stronger connections with the potential members, to talk about why we want everyone to join the union.

Potential member recruitment sample timeline

<table>
<thead>
<tr>
<th>Month</th>
<th>Potential Member Engagement</th>
</tr>
</thead>
</table>
| September | ▶ Connect with potential members in their first week on the job and find out how the start of the year is going.  
          | ▶ Start with a values-based conversation to get to know the potential member.  
          | ▶ Provide a copy of the Education Minnesota social justice newsletter.  
          | ▶ Ask them to become a member of the union. |
| October  | ▶ Ask what has been challenging at the beginning of the year.  
          | ▶ Highlight the benefit of professional development in a conversation and give them information about the MEA conference.  
          | ▶ Ask them to become part of the union. |
| November | ▶ Ask potential members what concerns they have about joining the union; be prepared to address the common reasons for not joining.  
          | ▶ Document potential member’s reasons for not joining.  
          | ▶ Ask them to become part of the union. |
| December | ▶ Check the seniority list to ensure you are recruiting all new hire potential members.  
          | ▶ Ask them to become part of the union. |
| January  | ▶ Check in with potential members about mid-year concerns or questions.  
          | ▶ Highlight the work the union does on policy and legislative matters and invite to a Degrees, not Debt presentation.  
<pre><code>      | ▶ Ask them to become part of the union. |
</code></pre>
<table>
<thead>
<tr>
<th>Month</th>
<th>Potential Member Engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>February</td>
<td>Hold a mid-year welcome meeting with all new hires.</td>
</tr>
<tr>
<td></td>
<td>Provide information about the negotiations process.</td>
</tr>
<tr>
<td></td>
<td>Ask them to join in to present a unified voice in negotiations.</td>
</tr>
<tr>
<td></td>
<td>Ask them to become part of the union.</td>
</tr>
<tr>
<td>March</td>
<td>Follow up on issues highlighted in previous conversations.</td>
</tr>
<tr>
<td></td>
<td>Answer questions about concerns and challenges.</td>
</tr>
<tr>
<td></td>
<td>Ask them to become part of the union.</td>
</tr>
<tr>
<td>April</td>
<td>Highlight the democratic structure of the union.</td>
</tr>
<tr>
<td></td>
<td>Use the early enrollment program for potential members who qualify and who still have not joined.</td>
</tr>
<tr>
<td></td>
<td>Ask them to become part of the union.</td>
</tr>
<tr>
<td>May</td>
<td>Check in with potential members and share opportunities for leadership development and growth.</td>
</tr>
<tr>
<td></td>
<td>Ask them to become part of the union.</td>
</tr>
<tr>
<td>June–August</td>
<td>Make contact during the summer and invite to have a conversation outside of school.</td>
</tr>
<tr>
<td></td>
<td>Ask them to become part of the union.</td>
</tr>
</tbody>
</table>
PLANS
New Hire Orientation and Recruitment … In a Virtual World

Unions create community. Intentional social connection and support is even more important in the virtual world we’re living in due to the COVID-19 pandemic.

It might take more connections—and creativity—to get new hires to join the union in a social-distancing environment. But it can be done. And even when we can safely go back to face-to-face interactions, incorporating some of these virtual tools can strengthen and enhance your new hire orientation.

**Best practices for new hire orientation**

Although we may not be able to do in-person orientations, the best practices still stand in a virtual world. Here are some additional pieces to consider (please see New Hire Orientation booklet, p. 2-3):

- Set concrete goals
  - Messaging: Locals need to be even more intentional and concrete in who they are and what they believe in if not in a face-to-face environment.
  - Leadership team: Diversifying your team is key, especially with members familiar with digital organizing tools like social media, virtual meetings, texting platforms, etc.

- Create informal and virtual opportunities
  - **All meetings should include catchy titles and relevant content.**
  - Consider purchasing a video conferencing platform license like Zoom.
  - Utilize Hustle (a peer-to-peer texting platform) and social media, along with traditional methods of communication (such as email), to notify new hires of opportunities.

- Track participation
  - Prepare and recruit members to track participation on virtual platforms (copy participant lists in Zoom, Facebook Live events, conference calls, etc.).
  - Follow up on issues and concerns
    - Provide virtual opportunities for members to take action, such as participating in online professional development, attending virtual school board meetings or engaging in advocacy via letter-writing campaigns.

**Welcome meeting**

- Set agenda
  - Leaders should continue to share their union story, define comprehensive unionism and answer any questions new hires have about what it means to be in a union.
  - Make the meeting fun and interactive: Think of door prizes, poll questions and consider breakout rooms. Use the chat box to have new members answer a question.
  - Create a registration form attendees fill out in the waiting room before being admitted to the meeting to capture contact information and create the attendee list.
  - Consider roles for meeting
• **Online meeting platform tech**: This person knows their way around online meeting platforms. They can screen share, create breakout rooms and send people to them, troubleshoot problems, monitor chat for questions and comments, freeing up the meeting runner to focus on the new hires.

• **Dialogue facilitator**: Ensures the welcome meeting is interactive and a discussion, not just a presentation.

• **Breakout room leaders**: These people should have discussion questions ready and be comfortable facilitating conversation if participants are reluctant. They should also be comfortable with the membership application and know how to complete it.

• **Member speakers**: Diverse group of members who can share their union stories.

• Have an ask (signing up) and create peer motivation

• **Utilize “Join Now,” our new digital application process or discuss how membership applications will be shared with new hires.**

• **Celebrate membership with online meeting platform selfies that are shared over social media.**

**Follow up with new and potential members**

It may take multiple conversations with a potential member to connect the new hire's values and interests with the value of belonging to the union. Here are a few ways to share and gather information, foster community and build meaningful relationships between new employees and union colleagues.

• **Surveys**: Invite new employees to complete a survey about what supports they need as they start their school year (resources, professional development, orientation, etc.). This can provide valuable information about how to provide meaningful support for long-term success.

• **Hustle**: Use this peer-to-peer texting system to share information, invite input and participation and build relationships. Hustle interactions are often more effective than emails or phone calls.

• **Virtual meetings**: Create a series of sessions to help new employees become familiar with professional issues, union activism, political engagement and other topics.

• **Phone calls**: Check in periodically with new employees to see how things are going and if they have any questions.

• **Union buddies**: Connect experienced union members with new employees to serve as mentors or guides to connect new colleagues with supports, resources and relationships.

**EVERY MONTH CHECKLIST: Ongoing process for all new hires**

• Create fun virtual messages instead of handwritten notes to check in and invite new hires to meetings (texts, emails, digital cards, etc.)

• Consider socially distant home visits to connect one on one.

**New hire engagement ideas**

Use some of these virtual ideas to supplement your engagement calendar for the year:

• Host 10-minute meetings on new hire survival topics. Education Minnesota has a list with agendas and materials ready for you at [www.educationminnesota.org/members-only/member-engagement/Resources/new-hire-engagement](http://www.educationminnesota.org/members-only/member-engagement/Resources/new-hire-engagement).

• Offer virtual professional development opportunities through LearnUpon and other union-sponsored platforms.

• Hold outdoor socially distanced building meetings

• Offer pandemic-related union swag (branded face masks, hand sanitizer, etc.)

• Organize a union parade to visit new hires/members.

• Produce union-branded yard signs to welcome new hires/members.

• Plan virtual events like trivia nights or happy hours.

• Host absentee ballot parties and virtual GOTV events.
Professional Training for Educators
2021-22

Education Minnesota’s Core Trainings
2021-22

These trainings are available to Education Minnesota members only.
# Table of Contents

Education Minnesota Training and Professional Development ........................................................................... 1

*Union University* ........................................................................................................................................... 1
  - Voluntary Unionism: Thriving after the Janus decision ........................................................................... 1
  - Bargaining and Negotiations ...................................................................................................................... 1
  - Know Your Rights! Legal Rights and Responsibilities for Educators and Union Leaders ......................... 1
  - Leading and Growing Your Union (Available for In-Person and Live Zoom with Instructor) ................. 1

*Minnesota Educator Academy: Professional Practice* ..................................................................................... 1

*Personal Finance and Wellness* ................................................................................................................... 1

*Policy and Politics* ......................................................................................................................................... 1

Union University ............................................................................................................................................... 2

*Voluntary Unionism: Thriving after the Janus decision* ............................................................................... 2
  - Building an Inclusive, Welcoming Local .................................................................................................. 2
  - Building Power Through Issue Organizing ............................................................................................... 2
  - Building Relationships for the Schools and Communities Students Deserve ......................................... 2
  - Changing the Conversation About What Your Union Is (and Is Not) ......................................................... 2
  - Comprehensive Unionism: What Do You Value? ....................................................................................... 2
  - Digital Organizing 101 .............................................................................................................................. 3
  - Local Membership Training: A Step-by-Step Guide to Keeping Accurate Membership Information ........ 3
  - Meeting Members at Their Interests ........................................................................................................... 3
  - Navigating and Preparing 1:1 Conversations in a New World .................................................................... 3
  - Organizing for Safer and Healthier Schools, in a Pandemic and Beyond! ............................................... 3
  - Roles and Responsibilities of Building Representatives (also available asynchronously) ......................... 4
  - Shifting to an Organizing Culture ............................................................................................................. 4
  - Union Orientation Best Practices ............................................................................................................ 4
  - Who's With You? Mapping and Assessing Union Affinity (Support) at Your Site ..................................... 4

*Bargaining/Negotiations* .................................................................................................................................. 4
  - Bargaining Communications ...................................................................................................................... 4
  - Bargaining and Organizing for Workload Relief ........................................................................................ 5
  - Bargaining Laws, Rules and Regulations for ESPs .................................................................................. 5
  - Conversational School Finance ................................................................................................................ 5
  - Costing Education Support Professionals (ESP) Settlements (also available asynchronously) .................. 5
  - Costing Teacher Settlements (also available asynchronously) ................................................................... 5
  - Identifying and Including Special Education Issues in Contracts ............................................................. 5
  - Internal Communication with Members during Bargaining ..................................................................... 6
  - Language Matters ....................................................................................................................................... 6
  - Legal Issues in Bargaining ........................................................................................................................ 6
  - Negotiations Resources: Online Data and Information to Support Bargaining (also available asynchronously) 6
Preserving Statutory Protections ......................................................... 6
Rethinking Bargaining Surveys (also available asynchronously) ......................... 7
Unrequested Leave of Absence Strategies ........................................ 7
Using a Racial Equity Lens in Bargaining ........................................ 7
Virtual Negotiating: Moving Bargaining Online (also available asynchronously) ............... 7

Know Your Rights! Legal Rights and Responsibilities for Educators and Union Leaders .............................................................. 7
Blurred Lines: Addressing Boundaries ........................................ 7
Cellphones, Social Media and Student Safety ...................................... 8
Considering Staff Safety: Individual Issues and Proactive Steps for a Local .................. 8
Data Practices: Public, Private, Confidential, Nonpublic, Protected. What Does This All Mean? ......................... 8
Free Speech Rights of Educators .................................................. 8
Invisible Illnesses ......................................................................... 8
Legal Basics ............................................................................... 9
Legal Issues for ESPs .................................................................. 9
Legal Issues for Members Facing Disability ...................................... 9
Maltreatment and Mandatory Reporting .......................................... 9
Past Practice: How the Past Can Haunt (or Help) You! ......................... 9
Staff Development: The Law, Your Contract and Your Committee ............... 9
Supporting Transgender Students and Staff: Legal Issues and Best Practices ............... 10
Take It or Leave It: What You Can and Cannot Do Based on Your Local Contract ............. 10
Teacher Code of Ethics .................................................................. 10
Teacher Licensing Update ............................................................ 10
Top 10 Reasons for Discipline .................................................... 10
Unfair Labor Practices .................................................................. 10
What’s New? Ask the Lawyer ....................................................... 11

Leading and Growing Your Union ................................................ 11
A Living Legacy: Lessons from Labor History .................................. 11
Community Engagement: Building Relationships for the Schools and Communities Students Deserve ................. 11
Divided We Fall, United We Thrive: Learn to Grow a Community-Labor Coalition Within Your Local ......................... 11
Financial and Fiduciary Responsibilities for Local Leaders ..................... 11
Internal Audit Committee Training ............................................... 12
Internal Communications ............................................................ 12
Labor-Management Collaboration .................................................. 12
Sharing Our Legacy: Telling Our Union Stories ..................................... 12
Why is it so Hard to Talk about Race? ............................................. 12

Minnesota Educator Academy – Professional Practice .......................... 12

Using best practice in the classroom ............................................. 12
Cultural Competency 1-4 Series – Relicensure (also available asynchronously) ......................... 13
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing a Student-Centered Mindset</td>
<td>14</td>
</tr>
<tr>
<td>Digital Learning Strategies</td>
<td>14</td>
</tr>
<tr>
<td>Education Minnesota Foundation – Get Grants to Improve and Grow Your Practice</td>
<td>14</td>
</tr>
<tr>
<td>English Learners – Relicensure (also available asynchronously)</td>
<td>14</td>
</tr>
<tr>
<td>Introduction to Restorative Practices</td>
<td>14</td>
</tr>
<tr>
<td>Positive Behavior Intervention Strategies – Relicensure (also available asynchronously)</td>
<td>14</td>
</tr>
<tr>
<td>Reading Seminar – Relicensure (also available asynchronously)</td>
<td>15</td>
</tr>
<tr>
<td>Special Education Dilemmas</td>
<td>15</td>
</tr>
<tr>
<td>Special Educators Working Together: Collaboration Strategies for Special Education Teams</td>
<td>15</td>
</tr>
<tr>
<td>Student Mental Health – Relicensure (also available asynchronously)</td>
<td>15</td>
</tr>
<tr>
<td>Suicide Prevention – Relicensure (also available asynchronously)</td>
<td>15</td>
</tr>
<tr>
<td>True Colors</td>
<td>15</td>
</tr>
<tr>
<td>Personal Finance and Wellness</td>
<td>16</td>
</tr>
<tr>
<td>Current Issues in Health Insurance</td>
<td>16</td>
</tr>
<tr>
<td>Degrees, Not Debt: Dealing with Student Loan Debt (also available asynchronously)</td>
<td>16</td>
</tr>
<tr>
<td>Energize Yourself</td>
<td>16</td>
</tr>
<tr>
<td>Financial Concerns for Women</td>
<td>16</td>
</tr>
<tr>
<td>How to Find Balance in Work and Life</td>
<td>17</td>
</tr>
<tr>
<td>Managing Your Money so You Can Plan for the Future</td>
<td>17</td>
</tr>
<tr>
<td>Mental Health Issues for Adults</td>
<td>17</td>
</tr>
<tr>
<td>Using Membership to the Max: Member Benefits (also available asynchronously)</td>
<td>17</td>
</tr>
<tr>
<td>When can I Afford to Retire? (For Members with a PERA Pension)</td>
<td>17</td>
</tr>
<tr>
<td>When can I Afford to Retire? (For Members with a TRA Pension)</td>
<td>18</td>
</tr>
<tr>
<td>Policy and Politics</td>
<td>18</td>
</tr>
<tr>
<td>An Overly Prescriptive and Slightly Presumptuous Guide to Persuasive Writing for Busy Educators</td>
<td>18</td>
</tr>
<tr>
<td>Legislative Session Preview/Update</td>
<td>18</td>
</tr>
<tr>
<td>Introduction to Campaign 2020</td>
<td>18</td>
</tr>
<tr>
<td>Winning Local Referendums: Set a Goal. Write a Plan. Execute. Learn How to Organize Locally and Work with Community and Labor Allies for the Win (Asynchronous Classes (Self-Guided) via MEA Online)</td>
<td>19</td>
</tr>
<tr>
<td>Available online via MEA Online for educators (self-guided)</td>
<td>20</td>
</tr>
<tr>
<td>Assessment for Learning in Response to COVID-19 (Live Recording)</td>
<td>20</td>
</tr>
<tr>
<td>Building Representative – Roles and Responsibilities</td>
<td>20</td>
</tr>
<tr>
<td>Certified Negotiator Program for Education Support Professionals Part 1 – PELRA and Bargaining Team Dynamics</td>
<td>20</td>
</tr>
<tr>
<td>Certified Negotiator Program for Education Support Professionals Part 2 – Member Engagement</td>
<td>20</td>
</tr>
<tr>
<td>Certified Negotiator Program for Education Support Professionals Part 3 – Research and Costing</td>
<td>20</td>
</tr>
<tr>
<td>Certified Negotiator Program for Education Support Professionals Part 4 – Preparing a Proposal and Communications</td>
<td>20</td>
</tr>
<tr>
<td>Certified Negotiator Program for Teachers</td>
<td>21</td>
</tr>
</tbody>
</table>
Classroom Mindfulness .................................................. 21
Community Engagement: Building Relationships for the Schools and Communities Students Deserve . 21
Costing Teacher Settlements ........................................ 21
Cultural Competency Training Part 1 – Relicensure ................................................................. 21
Cultural Competency Training Part 2 – Relicensure ................................................................. 21
Cultural Competency Training Part 3 – Relicensure ................................................................. 22
Cultural Competency Training Part 4 – Relicensure ................................................................. 23
Degrees, Not Debt ............................................................. 23
Engage Students with "Crossroads: An Anthology of Resilience and Hope by Young Somali Writers" (Live Recorded Session) .................................................. 23
English Learners – Relicensure ........................................ 23
ESP Costing Spreadsheet ................................................. 24
Finding Our Way Through: Navigating the Mental and Emotional Challenges of Our Current World (Live Recorded Session) .................................................. 24
Google's Applied Digital Skills Workshop ................................................................. 24
Health Insurance Basics & Beyond ................................................................. 24
Jim Crow of the North: Bringing Minnesota's Diverse History Into the Classroom ................................................................. 24
LGBTQ+ Introductory Training ........................................ 25
Meet and Confer ................................................................. 25
Moving Lives Minnesota: Student-Driven Storytelling Around Immigration (Live Recorded Session) ................................................................. 25
MRA I: Member Rights Advocacy ........................................ 25
MRA II: Member Rights Advocacy ........................................ 25
MRA III: Member Rights Advocacy ........................................ 25
Muslims in the Classroom: Practical Advice for Educators ................................................................. 26
Negotiating Equitable Benefits & A Family Friendly Workplace ................................................................. 26
Negotiations Resources: Online Data & Information to Support Bargaining ................................................................. 26
Positive Behavior Interventions & Instructional Strategies – Relicensure ................................................................. 26
Public Employees Insurance Program (PEIP) ................................................................. 26
Reading – Relicensure ................................................................. 26
Rethinking Bargaining Surveys (CBOC 2021 Recording) ................................................................. 27
Social Media, Legal Issues for Educators ................................................................. 27
Student Mental Health – Relicensure ................................................................. 27
Suicide Prevention - Relicensure ................................................................. 27
Taking Effective Notes in Bargaining and Member Meetings ................................................................. 27
Three Frames of Unionism ................................................................. 27
Using Membership to the Max: Member Benefits ................................................................. 27
Virtual Negotiating: Moving Bargaining Online (CBOC 2021 Recording) ................................................................. 28
Wealth Inequality and the Impact on Public Education ................................................................. 28
<table>
<thead>
<tr>
<th>Training Program</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education Minnesota Core Training FAQs</td>
<td>29</td>
</tr>
<tr>
<td>Core Training Reimbursement Opportunities</td>
<td>30</td>
</tr>
<tr>
<td>Certified Negotiators Program (CNP) (also available asynchronously)</td>
<td>31</td>
</tr>
<tr>
<td>Health Insurance Basics and Beyond (also available asynchronously)</td>
<td>33</td>
</tr>
<tr>
<td>Local and Community Action Team (LCAT) Training</td>
<td>34</td>
</tr>
<tr>
<td>Member Rights Advocacy (MRA) (also available asynchronously)</td>
<td>35</td>
</tr>
<tr>
<td>Peer Review: Strategies for Success</td>
<td>38</td>
</tr>
</tbody>
</table>
Education Minnesota Training and Professional Development

Union University
These help union leaders, activists and potential activists hone their skills, develop leadership and local capacity and learn how to be 21st century union leaders.

Voluntary Unionism: Thriving after the Janus decision
These courses are especially important to offer to local and IO leaders in the fall. It is strongly recommended that curriculum offerings for Fall Drive-Ins includes one or more of these courses. All of these courses provide important training to create thriving locals given the legal changes that occur after the Janus decision.

Bargaining and Negotiations
Building a strong local begins with a strong contract. These courses will allow either experienced and new members to a negotiations team, or members interested in supporting local bargaining, to be more inclusive and effective.

Know Your Rights! Legal Rights and Responsibilities for Educators and Union Leaders
Thinking of holding a staff walkout in your school? Frustrated by constant interruptions to your work by student cellphone use? Just want to know what you can and can’t do as an educator? These classes are designed for all educators to better get to know their legal rights and responsibilities.

Leading and Growing Your Union (Available for In-Person and Live Zoom with Instructor)
These courses help develop skills that current or emerging leaders need to be successful like planning, organizing, complying with union requirements, engaging members and the community and much more.

Minnesota Educator Academy: Professional Practice
These courses are designed for classroom educators and ESPs who are looking to use best practices in their work. These sessions are mostly taught by current, active educators who have practical, hands-on experience to share. Participants in these sessions will earn relicensing clock hours (also called CEUs). Make sure to check out the new courses to help educators engage in racially equitable classroom practices. Offering these courses in your IO or local is a great way to build awareness of all that the union has to support them in their work.

Personal Finance and Wellness
Did you know that being a member of the union also gives you access to financial planning, debt reduction and wellness resources? These courses are a great way to get to know the union-based opportunities for support for educators outside of their classrooms and in every part of their daily lives. Many will also provide strategies to activate yourself or colleagues to take action on these pressing issues.

Policy and Politics
Education is an increasingly political issue. These classes will help members and leaders understand how elected officials and the policies that they make impact our schools and students…and how to influence those decision makers.
Available for in-person classes and live Zoom with instructor

Union University

Voluntary Unionism: Thriving after the Janus decision

These courses are especially important to offer to local and IO leaders in the fall. It is strongly recommended that curriculum offerings for Fall Drive-Ins includes one or more of these courses.

1. Building an Inclusive, Welcoming Local
   Time: 60-90 minutes
   Presenters: Policy staff

   A local union structure is more than an executive committee and negotiators. It should encompass all three frames of unionism. This session will provide opportunity to identify areas in which your local union can build on your current structure to ensure a holistic approach to building power and capacity. Participants will answer the question: What do you need to have in place in order to be successful in building an organizing culture?

2. Building Power Through Issue Organizing
   Time: 60-90 minutes
   Presenters: Policy staff

   Is there a complex issue that needs a creative solution? It may be the need for restorative practices, how to address adult or student bullying, or any number of other issues that arise. This session will provide strategies and supporting tactics to tackle challenging issues and situations within your workplace.

3. Building Relationships for the Schools and Communities Students Deserve
   Time: 75 minutes
   Presenter:

   Now more than ever, the fight for safe, just and equitable schools means our Union must be deeply connected to the communities in which we work and live. We must be in community, not with passive presence, but in active partnership. Hear how Affiliates across the country are forging resilient ties to their communities by embracing diversity, cultivating collaboration and standing as allies for the common good. Learn how external partnership is not only a tool for winning on the issues we care about but also a smart strategy for deepening the Union’s connection to members.

4. Changing the Conversation About What Your Union Is (and Is Not)
   Time: 60-90 minutes
   Presenters: Policy staff

   There is a dominant narrative about education and unions that diminishes the profession and puts a false face on what unionism is and is not. This session will examine how to shift the conversation about education and unionism in your community. This training is based on work from the Grassroots Policy Project.

5. Comprehensive Unionism: What Do You Value?
   Time: 60-90 minutes
   Presenters: Policy staff
Join us to examine the beliefs and values about the work of comprehensive unionism. We will assess our work through the three frames of professional, social justice and traditional unionism. Participants will leave with a better understanding of how to engage members using all of the different frames.

6. **Digital Organizing 101**  
   *Time: 75 minutes*  
   *Presenter: Public Affairs staff*  
   Digital communications and social media have become a critical part of bargaining and organizing campaigns. Tools like mass texting, live video and Facebook can be incredibly useful in communicating with your members and the community at-large. This session will discuss the latest ways your local can use social media and other digital tools to promote your message, build momentum and address issues that matter to educators, students and parents -- including examples of what other local unions are already doing.

7. **Local Membership Training: A Step-by-Step Guide to Keeping Accurate Membership Information**  
   *Time: 120 minutes*  
   *Presenters: Membership*  
   Attendees will learn new systems to document, record and monitor membership information as well as discuss case scenarios that will be helpful in their day-to-day duties as membership contacts. There will be an opportunity to review membership materials and learn how to complete membership forms and document roster changes. Recording potential members will also be discussed.

8. **Meeting Members at Their Interests**  
   *Time: 60-90 minutes*  
   *Presenters: Policy staff*  
   Did you know that there’s a way to find out which of your members want to get more involved? Get support from the union to improve their work? Connect your union with the community? This course will teach you how to use member interest data to better engage members in your local based on what they want to do, not what you have to cajole them to do.

9. **Navigating and Preparing 1:1 Conversations in a New World**  
   *Time: 60-90 minutes*  
   *Presenters: Policy staff*  
   The importance of one-on-one conversations has never been greater, but navigating potential tensions can be intimidating. This session will provide guidance on how to engage and respond during those hard conversations while also being able to identify shared values and experiences.

10. **Organizing for Safer and Healthier Schools, in a Pandemic and Beyond!**  
    *Time: 75 minutes*  
    *Presenters: Legal staff*  
    This session will address the ways in which locals can organize and advocate around the topics of physical, emotional and virtual safety in the workplace. The course will give a brief overview of current state and federal
guidelines that pertain to these three areas, and provide time for participants to engage with other members and to hear about locals who organized and won.

11. **Roles and Responsibilities of Building Representatives (also available asynchronously)**
   
   *Time: 60-90 minutes*
   
   *Presenters: Field staff*

   Building representatives are the eyes and ears of the local. This session defines the role of building reps, and provides ideas for them on how to connect with members, conduct short informational meetings and advocate on behalf of the members they represent.

12. **Shifting to an Organizing Culture**

   *Time: 60-90 minutes*

   *Presenters: Policy staff*

   Unions are under attack and we cannot keep doing things the same way and expect to maintain our influence. By deconstructing traditional ways of union thinking, we can change our mindset about what unionism is and what we want that to look like. We can begin to build a more powerful union. This session will explore what an organizing culture looks like and how collective voice goes beyond the classroom.

13. **Union Orientation Best Practices**

   *Time: 60 min.*

   *Presenters: Field staff*

   Inviting new hires to join the union at the beginning of their employment has been a long-standing, successful practice for building and maintaining the strength of unions. A quality, well-planned orientation along with thoughtful, intentional follow up practices will increase the likelihood that new hires will recognize the value of belonging to the union and choose to join. This session will give you the latest research-based tips and tools you need to develop a successful new hire orientation program for your local.

14. **Who's With You? Mapping and Assessing Union Affinity (Support) at Your Site**

   *Time: 60-90 minutes*

   *Presenters: Policy staff*

   Unionism is based on relationships. Building relationships start with knowing who our members are and where they are, both literally and figuratively. In this session, participants will learn how to create a physical map of their building/site, and use this information to find ways to create community.

**Bargaining/Negotiations**

Building a strong local begins with a strong contract. These courses will allow either experienced and new members to a negotiations team, or members interested in supporting local bargaining, to be more inclusive and effective.

15. **Bargaining Communications**

   *Time: 60 minutes*

   *Presenters: Public affairs staff*

   Get ready for another bargaining season. This session will take you through the steps of developing an internal and external communications strategy that will help your local reach a competitive settlement. It will include
how to prepare for bargaining and a variety of proven tips, tools, and examples of materials and strategies used by other locals to build the public and internal support needed to get the best possible settlement.

16. **Bargaining and Organizing for Workload Relief**
   
   **Time:** 75 minutes
   
   **Presenters:** Negotiations staff
   
   Workload—a perennial challenge for educators—presented new and unanticipated pandemic-related challenges in 2020. During this class, we will identify the unique ways that workload challenges manifest in your local, identify potential remedies, and hear success stories from locals across the state.

17. **Bargaining Laws, Rules and Regulations for ESPs**
   
   **Time:** 75 minutes
   
   **Presenters:** Legal staff
   
   This session will cover common legal questions related to negotiations and will offer a comprehensive review of the laws, rules, and regulations affecting education support professionals in the workplace. We will also discuss the legal rights and obligations of the union and management with regard to collective bargaining.

18. **Conversational School Finance**
   
   **Time:** 75-90 minutes
   
   **Presenters:** Negotiations staff
   
   School finance is incredibly complex. Learn the basics of Minnesota’s school funding system, state trends, why we face underfunding and build your vocabulary around terms and concepts of school district budgets. You will learn how to use finance data to understand a district’s financial position and how to advocate with members and others for adequate and equitable funding for public education.

19. **Costing Education Support Professionals (ESP) Settlements (also available asynchronously)**
   
   **Time:** 60-75 minutes
   
   **Presenters:** Negotiations staff
   
   Knowing the cost of a salary proposal is necessary before presentation of the proposal to the district. ESP compensation schedules can be complex, making it difficult to understand the cost implications of a proposal. This session will demonstrate an Excel spreadsheet that has been developed by Education Minnesota to be used during negotiations to determine the cost of proposals.

20. **Costing Teacher Settlements (also available asynchronously)**
   
   **Time:** 60-75 minutes
   
   **Presenters:** Negotiations staff
   
   Knowing the cost of a salary proposal is necessary before presentation of the proposal to the district. Teacher negotiators need to understand the cost implications of a proposal before offering it to the employer. This seminar will demonstrate an Excel spreadsheet that has been developed by Education Minnesota to be used during negotiations to determine the cost of proposals. Participants are encouraged to bring laptops to this session.

21. **Identifying and Including Special Education Issues in Contracts**
   
   **Time:** 75 minutes
   
   **Presenters:** Legal staff
Collective bargaining agreements are an essential tool for meeting the increasing challenges facing special educators. This session will offer an opportunity to discuss special education workload and Education Minnesota’s bargaining goals related to special education, as well as exchange ideas on how best to address special education in your contract.

22. **Internal Communication with Members during Bargaining**  
*Time: 75 minutes*  
*Presenters: Public Affairs staff*  
This session will discuss strategies and options for effectively communicating with your members during negotiations.

23. **Language Matters**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
Locals and individual members need to pay close attention to language in their contracts. A few words can sometimes make a big difference in meaning. During this workshop we will review various examples of language from grievance to emergency leave and everything in between. Attendees should bring a copy of their collective bargaining agreement to the session.

24. **Legal Issues in Bargaining**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
Many legal issues arise during bargaining. Can the employer refuse to provide budget documents? Are the district’s negotiators bargaining in good faith? Can they summarize negotiations in the newsletter? This session will cover a variety of legal questions that come up before, during and after negotiations.

25. **Negotiations Resources: Online Data and Information to Support Bargaining (also available asynchronously)**  
*Time: 60-75 minutes*  
*Presenters: Negotiations staff*  
Are you new to your bargaining team or to doing research in support of bargaining? Familiarize yourself with the negotiations tools on the Education Minnesota website, the Department of Education website, AFT and NEA, and other resources on the web. You will learn to use resources that will assist you and your local in doing the research necessary to prepare for bargaining. Tools include a contract language search engine, data on demographics and funding, survey tools and economic data.

26. **Preserving Statutory Protections**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
This session will help you develop strategies to preserve legal protections relevant to your workplace, including leave laws, the Public Employment Labor Relations Act and laws related to pay and benefits. Participants will discuss strategies to extend statutory protections to all bargaining unit members and
strategies to negotiate greater benefits than those provided in statutes. Bring your own contract for reference during the session.

27. **Rethinking Bargaining Surveys (also available asynchronously)**

*Time: 60-90 min.*

*Presenters: Field staff*

Bargaining surveys are a staple in the negotiations process, but are they the best way to get information about members’ needs, priorities and values? In this session, participants will explore alternative methods for gathering information that define bargaining priorities, and we will also discuss how these methods can also build local organizing capacity. Participants will also examine how surveys can be used later in the bargaining process to create a cycle of communications between members and their bargaining team.

28. **Unrequested Leave of Absence Strategies**

*Time: 60-90 minutes*

*Presenters: Legal staff*

Members discuss and develop strategies for writing or refining contract language dealing with unrequested leaves of absence.

29. **Using a Racial Equity Lens in Bargaining**

*Time: 75 minutes*

*Presenters: Legal staff*

This session will explore collective bargaining and organizing strategies to elevate the voices of members of color, students and other traditionally underrepresented groups. Participants will examine barriers for members of color in their unions and use an equity audit to examine contracts and local practices that are limiting for underrepresented educators.

30. **Virtual Negotiating: Moving Bargaining Online (also available asynchronously)**

*Time: 75 minutes*

*Presenters: Field staff*

The COVID-19 pandemic has required flexibility and adaptability in everything, including our union work. This session will provide guidance and practical hands-on experience for virtual bargaining, from gathering input from members to ratification. We will discuss ways to optimize the use of online meetings and practice with tools that can advance discussions.

**Know Your Rights! Legal Rights and Responsibilities for Educators and Union Leaders**

Thinking of holding a staff walkout in your school? Frustrated by constant interruptions to your work by student cellphone use? Just want to know what you can and can’t do as an educator? These classes are designed for all educators to better get to know their legal rights and responsibilities.

31. **Blurred Lines: Addressing Boundaries**

*Time: 60-90 min.*

*Presenters: Legal staff*

This training will cover areas such as communication boundaries, personal boundaries, financial boundaries, relationship boundaries, institutional boundaries and power boundaries. Under these topics, we will address
giving students rides home, texting with students, buying a student breakfast or having coffee with a student. We’ll delve into where the legal lines are and the potential legal consequences of blurring those boundaries.

32. **Cellphones, Social Media and Student Safety**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff
   
   With cellphones becoming increasingly prevalent in schools, this presentation will explore these and other legal questions that arise when students use their cellphones to record or photograph their classmates or school employees. This session will also provide some tips to help navigate some of the common social media pitfalls and protect you as an educator.

33. **Considering Staff Safety: Individual Issues and Proactive Steps for a Local**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff
   
   Safety in our schools is important for educators, students and families. A safe classroom and school means a safe educational environment for students and a safe workplace for employees. Considering staff safety means considering individual issues for staff and students, but there are also proactive steps a local union could take to address safety and the impact on staff and students. This session will provide information on options for staff who are injured or at risk for injury, as well as options for local unions to consider.

34. **Data Practices: Public, Private, Confidential, Nonpublic, Protected. What Does This All Mean?**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff
   
   This session will cover the Minnesota Government Data Practices Act, including a basic introduction and more advanced topics. Participants will learn about various types of personnel data, and the circumstances under which that data may be available to the public. We will discuss educational data and the duty to keep this data private.

35. **Free Speech Rights of Educators**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff
   
   This class will examine the various sources of speech protection for educators, both within and outside the classroom. After learning about major Supreme Court cases and Minnesota laws affecting free speech rights of educators, participants will apply their knowledge with real-life scenarios. Participants will also learn strategies for protecting or expanding their own speech rights through collective bargaining.

36. **Invisible Illnesses**
   
   **Time:** 45-60 minutes  
   **Presenters:** Legal staff
   
   Invisible illnesses include a large and varied number of conditions, from depression to migraines to fibromyalgia. People who suffer from invisible illnesses often don’t look sick, and because of that they are sometimes not believed. We will discuss the legal protections available to these individuals, and how those
protections may coincide or diverge from contract language. We will also discuss how we can best represent and support fellow educators who suffer from invisible illnesses.

37. **Legal Basics**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
Many state laws impact educators in the classroom and affect your working conditions and employment status. Join us for an interactive review of the key things to know as a Minnesota educator. This session is particularly beneficial for newer members.

38. **Legal Issues for ESPs**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
This session will offer a review of the laws affecting ESPs. An Education Minnesota attorney will walk you through the Public Employment Labor Relations Act (PELRA), wage and hour laws, leave laws, anti-discrimination laws and other applicable state and federal laws.

39. **Legal Issues for Members Facing Disability**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
In this session, we will address the various issues faced by our members and locals when it comes to navigating physical and mental disabilities, including strategies for member rights advocates to use in assisting members with disabilities, how members request accommodations, the Long-Term Disability (LTD) application process, disability benefits through the pension programs and other related issues.

40. **Maltreatment and Mandatory Reporting**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
This session will test participants' knowledge and provide tips for educators on how to comply with the Maltreatment of Minors Act. When and how are members required to report suspected child abuse or neglect? What are your rights if you are the subject of an investigation? These questions and more will be discussed.

41. **Past Practice: How the Past Can Haunt (or Help) You!**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
What constitutes a binding past practice? How can I use past practice to support a grievance? What is the proper way to terminate a past practice? An Education Minnesota attorney will walk you through the answers to these questions and more.

42. **Staff Development: The Law, Your Contract and Your Committee**  
*Time: 60-90 minutes*  
*Presenters: Education issues staff*
Is your district’s staff development aligned with the law? In this session participants receive an update on the staff development law as well as information and strategies for staff development committees to implement the requirements in their district.

43. **Supporting Transgender Students and Staff: Legal Issues and Best Practices**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff

   Over the past few years, issues surrounding the rights of students and employees who identify as transgender have gone from relatively obscure to center stage. This presentation will identify legal challenges involving transgender individuals, including an update on cases brought against Minnesota school districts, the Department of Education’s partial revocation of its guidance regarding transgender students and cases across the nation.

44. **Take It or Leave It: What You Can and Cannot Do Based on Your Local Contract**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff

   Can I use FMLA to care for my sick grandchild? Does the district have to give me time off to send off my son who was just called up for active duty? My child’s school program is during the day but I don’t know if I can take time off to attend. This session will review various state and federal leave laws and include what to look for in your collective bargaining agreement. Bring your contract and your questions.

45. **Teacher Code of Ethics**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff

   Information provided will help licensed instructors avoid situations that could jeopardize their careers, licenses and reputations. The session focuses on the legal and ethical issues addressed by the Teacher’s Code of Ethics, including a discussion of other related laws. Being informed and understanding these issues will help you have a successful teaching career.

46. **Teacher Licensing Update**
   
   **Time:** 60-90 minutes  
   **Presenters:** Education issues staff

   Significant changes were made to the Minnesota teacher licensing system during the 2017 legislative session. This training will provide an overview of both the new tiered licensure system and the new standards board.

47. **Top 10 Reasons for Discipline**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff

   Join one of the Education Minnesota attorneys and discuss the top 10 reasons teachers receive discipline. From boundary issues with students to paperwork compliance, we will look at why discipline commonly happens and consider best practices for avoiding discipline as a teacher.

48. **Unfair Labor Practices**
   
   **Time:** 60-90 minutes  
   **Presenters:** Legal staff
This session will provide an overview of unfair labor practices under the Public Employment Labor Relations Act. We will discuss the legal rights and obligations of unions and employees and how to use those rights to aid in a successful organizing campaign.

49. **What's New? Ask the Lawyer**  
*Time: 60-90 minutes*  
*Presenters: Legal staff*  
Join one of the Education Minnesota attorneys as we review current legal issues and answer your burning legal questions. Even if you’ve attended before, we’ll have new questions to test your knowledge of the legal issues impacting educators.

**Leading and Growing Your Union**

These courses help develop skills that current or emerging leaders need to be successful like planning, organizing, complying with union requirements, engaging members and the community and much more.

50. **A Living Legacy: Lessons from Labor History**  
*Time: 60 minutes*  
*Presenters: Field staff*  
The history of labor and unions has much to teach us. This workshop highlights eight ongoing themes from labor history that continue to play out in union work today—themes that help us understand better how to mobilize members. In addition, this session will include a short video on the history of education unions in Minnesota that highlights milestones in our shared history.

51. **Community Engagement: Building Relationships for the Schools and Communities Students Deserve**  
*Time: 90 minutes*  
*Presenters: Field staff*  
Now more than ever, the fight for safe, just and equitable schools means our Union must be deeply connected to the communities in which we work and live. We must be in community, not with passive presence, but in active partnership.

52. **Divided We Fall, United We Thrive: Learn to Grow a Community-Labor Coalition Within Your Local**  
*Time: 60-90 minutes*  
*Presenters: Policy staff*  
Community-labor coalitions have always been a historical and effective vehicle toward fighting against divestments targeting public schools and Black and Brown communities, as well as attacks on the education profession. Some of victories that such coalitions have won both locally and across the U.S. include the recent victory in West Virginia, the Fight for 15, Paid Sick and Safe time, Sanctuary Cities/Districts ordinances. This workshop will explore ways that community-labor coalitions can help to grow and strengthen our schools, communities, and public education, especially in a post-Janus world.

53. **Financial and Fiduciary Responsibilities for Local Leaders**  
*Time: 60 minutes*  
*Presenters: Finance staff*  
Education Minnesota and all its affiliates and intermediate organizations must comply with local, state and federal laws, plus the rules and policies set forth in our governance documents and by our national affiliates.
At the same time, we must ensure strong financial practices. This session will provide information on fiduciary responsibilities and financial training for treasurers, local and intermediate organization leaders.

54. **Internal Audit Committee Training**
   
   **Time:** 60 minutes
   
   **Presenters:** Finance staff
   
   Your local’s internal audit committee plays a critical role in maintaining the integrity of the local’s financial reporting. Having the right knowledge and tools will help your committee manage this important responsibility in the most efficient way possible. We'll take you step by step through the internal financial review process.

55. **Internal Communications**
   
   **Time:** 60 minutes
   
   **Presenters:** Public affairs staff
   
   Communicating with your members at the local level is vitally important, especially now. This workshop will have participants analyzing and sharing ideas on ways to improve internal communications within their local or IO. The workshop will look at ways to share information and draft communications plans during both bargaining and member engagement work.

56. **Labor-Management Collaboration**
   
   **Time:** 60-90 min.
   
   **Presenters:** Policy staff
   
   This session will explore the benefits of union-management partnering to improve the quality of teaching and learning for children.

57. **Sharing Our Legacy: Telling Our Union Stories**
   
   **Time:** 60 minutes
   
   **Presenters:** Field staff
   
   Knowing where we’ve been helps us decide where we’re going. One common issue locals and leaders face is how to help members understand both their local labor history and their personal union history. When members have historical context, they better understand the reasons to be involved. In this session, we focus on strategies for locals to begin to capture their histories and for members to share their own union stories.

58. **Why is it so Hard to Talk about Race?**
   
   **Time:** 75 minutes
   
   **Presenters:** Field staff
   
   Race talk, along with the expression of strong, intense emotions, is often discouraged in the classroom. This session will provide space and language for educators to learn and talk about three common barriers to opening discussions about racism in our schools. Our hope coming out of this session is that participants will have the tools to label their own barriers to talk about race and some tools to help us all move forward.

---

**Minnesota Educator Academy – Professional Practice**

**Using best practice in the classroom**

These courses are focused on classroom educators and ESPs who are looking to use best practices in their work. These sessions are mostly taught by current, active educators who have practical, hands-on experience to share.
Participants in these sessions will earn relicensing clock hours (also called CEUs.) Make sure to check out the new courses to help educators engage in racially equitable classroom practices. Offering these courses in your IO or local is a great way to build awareness of all that the union has to support members in their work.

59. Cultural Competency 1-4 Series – Relicensure (also available asynchronously)

(8 hours for complete series to satisfy relicensure requirement) (50 max. capacity)

This series is designed to deepen educators’ understanding of their own frames of reference, the potential bias in these frames, and their impact on expectations for and relationships with students, students' families, and the school communities. Participants will engage in self-reflection and discussion around the following topics: racial, cultural, and socioeconomic groups; American Indian and Alaskan native students; religion; systemic racism; gender identity, including transgender students; sexual orientation; language diversity; and individuals with disabilities and mental health concerns.

The series can be offered in a variety of configurations (one eight-hour session is not an option due to the intensity of the material):
- Four two-hour sessions
- Two four-hour sessions (refreshments and a meal would need to be provided)

Our recommendation for best practice is to offer two 4-hour sessions in close proximity to one another. Participants will not receive relicensure credit for the Cultural Competency requirement until they have completed all four sessions.

This training is designed to meet the language and intent of the MN statutory requirement. It is the only MEA PD training that meets all the required content. Culturally Responsive Teaching does not fulfill all requirements. Local continuing education committees have the authority to approve or deny submissions so please check with local leaders if you have questions.

Module 1: Expanding Your Equity Lens

(2 hours)

Equity work is a journey and in this session we will lay the foundation for centering equity work in your community. Participants will ground themselves with norms and vocabulary, and develop an understanding of the importance of intercultural competency.

Module 2: Finding the ‘I’ in Equity

(2 hours)

Equity begins with an exploration of self. Participants in this session will begin to understand implicit bias and the construction of privilege. One of the goals of the session is to develop strategies to recognize and dismantle implicit bias in their lives.

Module 3: The Power of Language

(2 hours)

Equity work must be done in relationship with others. Language is power, and identifying skills to speak up against prejudice, bias, and stereotypes takes practice. Upon completion, participants will be able to acknowledge and respond to microaggressions, understand intent versus impact, and how to restore relationships using inclusive and recovery language.

Module 4: Next Steps for Equity Work

(2 hours)
Equity work is ongoing. This session will highlight important strategies as you continue on your equity journey. We will go over definitions and characteristics of equity literacy, go over pitfalls of activist burnout, and provide time for participants to develop an action plan to use in your learning community.

Presenters: Member trainers and policy staff

60. Developing a Student-Centered Mindset

Time: 60 minutes

Presenters: Education issues staff

Students are a complex make up of their cultural background, soci-economic status, maturation and mental health. This course will help you develop an awareness of these factors and provide you with additional resources to be more effective in working with all students.

61. Digital Learning Strategies

(35 max. capacity)

Time: 60, 90 or 120 minutes

Presenters: Member trainers and policy staff

Participants will learn about tools and strategies that will take instructional practice to a digital level and return to their classrooms with a new framework for supporting all students.

62. Education Minnesota Foundation – Get Grants to Improve and Grow Your Practice

Time: 60 minutes

Presenters: Policy staff

This training will review the different Education Minnesota Foundation grant applications, and show how the easy grant writing process can benefit educators, education support professionals and students.

63. English Learners – Relicensure (also available asynchronously)

(35 max. capacity)

Time: 60, 90 or 120 minutes

Presenters: Member trainers and policy staff

Learn to tap into the strengths the English Learners bring to your class. Discover strategies for differentiation and scaffolding to support their work as they progress through stages of language acquisition.

64. Introduction to Restorative Practices

Time: 60-90 minutes

Presenters: Member trainers and policy staff

Educators will learn the history and seven guiding principles of restorative practices. Participants will have the opportunity to learn about the circle process and reflect on the benefits of restorative practices in learning communities. Participants will also be given time to reflect on their own classroom, site and district’s capacity to adopt restorative practices.

65. Positive Behavior Intervention Strategies – Relicensure (also available asynchronously)

(35 max. capacity)

Time: 60, 90 or 120 minutes

Presenters: Member trainers and policy staff
This session focuses on effective strategies that lead to increased student engagement and achievement.

66. **Reading Seminar – Relicensure (also available asynchronously)**

(35 max. capacity)

*Time: 60, 90 or 120 minutes*

*Presenters: Member trainers and policy staff*

Participants will review the research and exemplary practices that help students acquire strong reading comprehension skills.

67. **Special Education Dilemmas**

*Time: 60-90 minutes*

*Presenters: Legal staff*

An interactive discussion for special education staff and paraprofessionals on how to improve collaboration and communication with colleagues, parents and administrators in difficult situations.

68. **Special Educators Working Together: Collaboration Strategies for Special Education Teams**

*Time: 60-90 minutes*

*Presenters: Education issues staff*

The goal of this training is to introduce best practices for enhancing special education ESP and teacher partnerships build on trust, respect, communication and unified purpose. Teams will learn collaboration strategies to support student and family capacity for growth. This training is designed for teams of special educators. Ideally, teachers will attend this training with their ESP colleagues.

69. **Student Mental Health – Relicensure (also available asynchronously)**

(35 max. capacity)

*Time: 60, 90 or 120 minutes*

*Presenters: Member trainers and policy staff*

This session raises awareness of key warning signs for early onset mental illness in children and adolescents and includes strategies for addressing learning challenges faced by students with particular mental health challenges.

70. **Suicide Prevention – Relicensure (also available asynchronously)**

(35 max. capacity)

*(Please note: This training is presented by outside experts. Please submit your requests with ample lead time to give Education Minnesota the opportunity to obtain a trainer.)*

*Time: 60, 90 or 120 minutes*

*Presenters: Community partners*

This session will focus on best practices in the area of suicide prevention. Note: Due to the sensitive nature of this training, facilitators will be licensed practitioners in the area of mental health. Please contact the Education Issues staff directly to coordinate a request for training.

71. **True Colors**

*Time: 120 minutes*

*Presenters: Field staff*
True Colors has been created as a vocabulary through which people can communicate the expression of their character. True Colors is an easy, entertaining way to identify your character spectrum to better understand yourself and others. It is an invaluable tool for enjoying success in your personal and professional life. True Colors uses four colors to identify distinct perspectives and personalities. Most of us have a dominant or bright color and are influenced or shaded by the other three colors, thus creating our True Colors Spectrum. True Colors establishes a common language by which we communicate core motivations, needs and behaviors. Discovering your True Colors Spectrum is fun and exciting! Once you recognize the True Colors in yourself and others, you will be able to respond more appropriately and concisely in your varied communication settings. School employees will be able to understand their students and will communicate more effectively with students and parents after attending the True Colors training.

**Personal Finance and Wellness**

Did you know that being a member of the union also gives you access to financial planning, debt reduction and wellness resources? These courses are a great way to get to know the union-based opportunities for support for educators outside of their classrooms and in every part of their daily lives. Many will also provide strategies to activate yourself or colleagues to take action on these pressing issues.

72. **Current Issues in Health Insurance**
   - **Time:** 60-90 minutes
   - **Presenters:** Policy staff
   - This session will explore key health insurance issues that affect Education Minnesota members. Session topics will range from insurance fundamentals, including cost management strategies and plan design issues, to current topics, including wellness plans, medical spending accounts, PEIP and HITA.

73. **Degrees, Not Debt: Dealing with Student Loan Debt (also available asynchronously)**
   - **Time:** 60 minutes
   - **Presenters:** Policy staff
   - We want to make sure you, as an educator, know about existing student loan forgiveness programs, how to find out if you’re eligible and how to apply for them. Education Minnesota's Degrees, Not Debt program is rallying public support to decrease the cost of college and make it easier and cheaper to pay student loan debt. We know that student loan debt makes life hard for many young educators, driving some away from teaching. Many see the cost of college as a barrier to getting into the profession in the first place. These challenges weaken the diversity and depth of our teaching corps.

74. **Energize Yourself**
   - **Time:** 60 minutes
   - **Presenters:** Field staff
   - Feeling a bit out of sync, overloaded and lacking in energy? With this session, you can take some positive steps toward adding energy to your life! This session is full of great tips for you!

75. **Financial Concerns for Women**
   - **Time:** 60 minutes
   - **Presenters:** EFS Advisors
According to statistics, 90 percent of all women will be the sole financial decision maker for themselves and/or their families at some time. This session will explore financial concepts necessary to being a financial decision maker. Both beginning and sophisticated financial decision makers are warmly welcome in this session.

76. **How to Find Balance in Work and Life**
   
   *Time: 60 minutes*
   
   *Presenters: Field staff*
   
   Don’t let stress interfere with your ability to be successful! There are simple techniques that can easily be worked into your schedule that will help you deal with stress and lift your spirits. Techniques will be demonstrated in this session!

77. **Managing Your Money so You Can Plan for the Future**
   
   *Time: 60 minutes*
   
   *Presenters: EFS Advisors*
   
   Sometimes it seems impossible to stretch your paycheck for your bills, student loans and other debts, let alone save for the future. Session topics will include budgeting, paying down credit cards, savings including 403(b) and Roth IRA, saving on daycare expenses using flex money and more.

78. **Mental Health Issues for Adults**
   
   *Time: 60-90 minutes*
   
   *Presenters: Legal staff*
   
   Educators perform a hard job, often under scrutiny and with many of students depending on them. When our members experience mental illness or experience a mental health crisis, what can we do to recognize this and respond with as much help as possible? What protections do our members have, and what resources are available to them? This session will explore those issues.

79. **Using Membership to the Max: Member Benefits (also available asynchronously)**
   
   *Time: 60 minutes*
   
   *Presenters: ESI staff*
   
   Education Minnesota ESI works to bring quality programs and services to members and their families. Through a member-led advisory committee and board, programs and services go through a review process before being sponsored. Learn about the ESI, NEA and AFT sponsored programs including identity theft protection, financial resources and shopping discounts. There are programs for members at every stage in their career. In fact, there are many ways for members to save the cost of their dues and more.

80. **When can I Afford to Retire? (For Members with a PERA Pension)**
   
   *Time: 90-120 minutes*
   
   *Presenters: EFS Advisors, ESI retirement consultants and Educators Lifetime Solutions*
   
   The answer to this question depends not only on how well you have planned financially, but also on what your plans are in retirement. While you are working, your income comes from your paycheck. In retirement, your income will come from three sources: your pension, social security, any savings you have accumulated in accounts such as 403(b)/457/IRAs and savings. In this session, members will begin to understand how defined-benefit pensions work and how income in retirement is calculated based on the pension option you choose. You will also learn about various investment plans and the differences between them so you can plan
what is best for you. Also important are health care choices, and decisions related to long-term care insurance as a means to provide independence as well as helping to protect assets and retirement savings.

81. **When can I Afford to Retire? (For Members with a TRA Pension)**

   *Time: 90-120 minutes*

   *Presenters: EFS Advisors, ESI retirement consultants and Educators Lifetime Solutions*

   The answer to this question depends not only on how well you have planned financially, but also on what your plans are in retirement. While you are working, your income comes from your paycheck. In retirement, your income will come from three sources: your pension, social security, any savings you have accumulated in accounts such as 403(b)/457/IRAs and savings. In this session, members will begin to understand how defined-benefit pensions work and how income in retirement is calculated based on the pension option you choose. You will also learn about various investment plans and the differences between them so you can plan what is best for you. Also important are health care choices, and decisions related to long-term care insurance as a means to provide independence as well as helping to protect assets and retirement savings.

### Policy and Politics

Education is an increasingly political issue. These classes will help members and leaders understand how elected officials and the policies that they make impact our schools and students...and how to influence those decision makers.

82. **An Overly Prescriptive and Slightly Presumptuous Guide to Persuasive Writing for Busy Educators**

   *Time: 60 minutes*

   *Presenters: Public affairs staff*

   Imagine you need to write a letter to the editor, Facebook post to your local, testimony to the Legislature, newspaper op-ed or a short speech to your school board. Now imagine writing this stuff isn’t your day job. This class presents a step-by-step process for focusing your argument and expressing it in 250-word or 750-word pieces. We're leaving the theory for another day and drilling down to a few key concepts, a time-tested essay structure and a few rhetorical flourishes from the speechwriters' toolkit.

83. **Legislative Session Preview/Update**

   *Time: 45-60 minutes*

   *Presenters: Public affairs staff*

   What are the governor’s and lawmakers’ priorities likely to be in 2020? We will offer our predictions on what to expect in the 2020 legislative session.

84. **Introduction to Campaign 2020**

   *Time: 120 minutes*

   *Presenters: Public affairs staff*

   In 2018, Education Minnesota re-shaped our election work -- focusing on getting out the vote at the worksite level. Voting is still a high priority in 2020. And through our union, we have the power to win generational change for public education in Minnesota. To do that, we must: 1. Get out 100 percent of the educator vote for public education on Nov. 3, 2020. 2. Collectively engage at least 33,000 parents and community voters in the election and beyond. 3. Unite our co-workers and communities in a statewide movement for full funding of public education in the spring of 2021. To reach these goals, we need educators like you at the forefront of this
movement. In this session, you will learn more about how to join together with your co-workers in the 2020-21 campaign.

85. **Winning Local Referendums: Set a Goal. Write a Plan. Execute. Learn How to Organize Locally and Work with Community and Labor Allies for the Win (Asynchronous Classes (Self-Guided) via MEA Online)**

*Time: 60 minutes*

*Presenters: Public affairs staff*

This session will cover the tools, resources and help available to locals that are working to pass an operating, building or technology referendum. The session includes valuable information for new and veteran leadership on how to create and execute a successful referendum campaign. The session explains what resources Education Minnesota offers, how to evaluate your community’s climate on levies, and working with other community and labor organizations such as parent groups and AFL-CIO Area Labor Councils (ALCs). Learn from other locals on the do’s and don’ts of winning a referendum.
Available online via MEA Online for educators (self-guided)

Self-guided trainings available at all times for members to complete on their own and at their own pace. Access these classes at educationminnesota@meaonline.com. If you need initial access, email meaonline@edmn.org and request access to MEA Online.

86. Assessment for Learning in Response to COVID-19 (Live Recording)

   Asynchronous
   Time: 60 minutes

   Since being thrust into a new way of teaching and learning during a pandemic, you may feel a need to reexamine the purpose of assessment in your classroom, and at the state and district levels. In this session participants will discuss the purposes of different types of assessments used to check for student understanding in both remote and in-person classroom settings, how to use various resources on the new Testing 1, 2, 3 website to improve the rigor of standards-based classroom assessments, and how to use and act on the resulting assessment data to improve instruction and learning for your students. This presentation was recorded live during the 2020 MEA Conference on October 15th, and is hosted by Kendra Olsen, Outreach Specialist in Data and Reporting - Statewide Testing for the Minnesota Department of Education.

87. Building Representative – Roles and Responsibilities

   Asynchronous
   Time: 60 minutes

   This training will help members develop knowledge and skills around being a Building Representative.

88. Certified Negotiator Program for Education Support Professionals Part 1 – PELRA and Bargaining Team Dynamics

   Asynchronous
   Time: 1 hour

   This course will address the legal basis for bargaining, how to create an effective and functioning bargaining team, and the external and internal norms of a successful team.

89. Certified Negotiator Program for Education Support Professionals Part 2 – Member Engagement

   Asynchronous
   Time: 1 hour

   It's essential that we recognize the vital importance of the real, perceived and potential power of our union. Members = Muscle, when you build engagement your power grows!

90. Certified Negotiator Program for Education Support Professionals Part 3 – Research and Costing

   Asynchronous
   Time: 1 hour

   In this section of ESP negotiation training, the participants will receive training on where resources are that will benefit your team during the negotiation process. These resources will include: language searches, settlement reports, cost comparison, and costing programs.

91. Certified Negotiator Program for Education Support Professionals Part 4 – Preparing a Proposal and Communications

   Asynchronous
Time: 1 hour

During this part of the course, you will learn strategies for preparing a proposal, presenting a proposal and how to respond to the proposals from the board. We will talk about the different modes of communication you can use during bargaining and do some scenarios to determine which modes are more effective during certain situations.

92. **Certified Negotiator Program for Teachers**
   
   **Asynchronous**  
   **Time:** 4 hours

   In this course negotiators will acquire knowledge and skills to lead their locals to settlement. The following essential aspects of bargaining will be covered: foundational labor law, member engagement, negotiations research, costing overview, team dynamics, proposal creation and preparation for being "at the table".

93. **Classroom Mindfulness**
   
   **Asynchronous**  
   **Time:** 60 minutes

   Participants will learn about mindfulness practices as well as how they can be used in a classroom to help students focus and manage their own emotions. After the session, participants will walk away with an easy to use action plan they can implement in their classrooms. Different strategies will be discussed for various teaching levels. This live session was presented by Judi Roux, assistant professor, and Julie Zaruba Fountaine, wellness coordinator for students, of The College of St. Scholastica, at the 2020 MEA Conference on October 15th.

94. **Community Engagement: Building Relationships for the Schools and Communities Students Deserve**
   
   **Asynchronous and Synchronous**  
   **Time:** 90 minutes

   Now more than ever, the fight for safe, just and equitable schools means our Union must be deeply connected to the communities in which we work and live. We must be in community, not with passive presence, but in active partnership.

95. **Costing Teacher Settlements**
   
   **Asynchronous**  
   **Time:** 60 minutes

   Knowing the cost of a salary proposal is necessary before presenting it to the district, but teacher compensation schedules can be complicated and difficult to understand. This session will demonstrate an Excel spreadsheet developed by Education Minnesota which calculates the cost of proposals.

96. **Cultural Competency Training Part 1 – Relicensure**
   
   **Asynchronous**  
   **Time:** 2 hours

   As of July 31, the entire four-part Cultural Competency sequence is now available as a learning path (located in the catalog and then click on learning paths towards the top). We highly encourage anyone starting this series to please enroll in the learning path instead of this course. These courses are available separately for members who started the series pre-COVID. Thank you for understanding.

   This four-part series is designed to deepen educators’ understanding of their own frames of reference, the potential bias in these frames, and their impact on expectations for and relationships with students, students’ families, and the school communities. Participants will engage in self-reflection around the following topics: racial, cultural,
and socioeconomic groups; American Indian and Alaskan native students; religion; systemic racism; gender identity, including transgender students; sexual orientation; language diversity; and individuals with disabilities and mental health concerns.

Participants will not receive relicensure credit for the Cultural Competency requirement until they have completed all four courses. This training is designed to meet the language and intent of the MN statutory requirement. It is the only MEA PD training that meets all the required content. Local continuing education committees have the authority to approve or deny submissions so please check with local leaders if you have questions.

Equity work is a journey and in Part 1 we will lay the foundation for centering equity work in your community. Participants will ground themselves with norms and vocabulary and develop an understanding of the importance of intercultural competency.

**97. Cultural Competency Training Part 2 – Relicensure**

*Asynchronous*

*Time: 2 hours*

This course is for members who have completed Cultural Competency Training: Part 1.

This four-part series is designed to deepen educators’ understanding of their own frames of reference, the potential bias in these frames, and their impact on expectations for and relationships with students, students’ families, and the school communities. Participants will engage in self-reflection around the following topics: racial, cultural, and socioeconomic groups; American Indian and Alaskan native students; religion; systemic racism; gender identity, including transgender students; sexual orientation; language diversity; and individuals with disabilities and mental health concerns.

Participants will not receive relicensure credit for the Cultural Competency requirement until they have completed all four courses. This training is designed to meet the language and intent of the MN statutory requirement. It is the only MEA PD training that meets all the required content. Local continuing education committees have the authority to approve or deny submissions so please check with local leaders if you have questions.

Equity begins with an exploration of self. Participants in Part 2 will begin to understand implicit bias and the construction of privilege. One of the goals of the session is to develop strategies to recognize and dismantle implicit bias in their lives. Learners will read articles, write in their work book, and watch TED Talks to deepen their knowledge and understanding.

**98. Cultural Competency Training Part 3 – Relicensure**

*Asynchronous*

*Time: 2 hours*

This course is for members who have completed Cultural Competency Training: Parts 1 & 2.

This four-part series is designed to deepen educators’ understanding of their own frames of reference, the potential bias in these frames, and their impact on expectations for and relationships with students, students’ families, and the school communities. Participants will engage in self-reflection around the following topics: racial, cultural, and socioeconomic groups; American Indian and Alaskan native students; religion; systemic racism; gender identity, including transgender students; sexual orientation; language diversity; and individuals with disabilities and mental health concerns.

Participants will not receive relicensure credit for the Cultural Competency requirement until they have completed all four courses. This training is designed to meet the language and intent of the MN statutory requirement. It is the only MEA PD training that meets all the required content. Local continuing education committees have the authority to approve or deny submissions so please check with local leaders if you have questions.
Equity work must be done in relationship with others. Language is power, and identifying skills to speak up against prejudice, bias, and stereotypes takes practice. In Part 3, participants will be able to acknowledge and respond to microaggressions, understand intent versus impact, and how to restore relationships using inclusive and recovery language.

99. Cultural Competency Training Part 4 – Relicensure

Asynchronous

Time: 2 hours

This course is for members who have completed Cultural Competency Training: Parts 1, 2, & 3. This four-part series is designed to deepen educators’ understanding of their own frames of reference, the potential bias in these frames, and their impact on expectations for and relationships with students, students’ families, and the school communities. Participants will engage in self-reflection around the following topics: racial, cultural, and socioeconomic groups; American Indian and Alaskan native students; religion; systemic racism; gender identity, including transgender students; sexual orientation; language diversity; and individuals with disabilities and mental health concerns.

Participants will not receive relicensure credit for the Cultural Competency requirement until they have completed all four courses. This training is designed to meet the language and intent of the MN statutory requirement. It is the only MEA PD training that meets all the required content. Local continuing education committees have the authority to approve or deny submissions so please check with local leaders if you have questions.

Equity work is ongoing. Part 4 will highlight important strategies as you continue on your equity journey. We will go over definitions and characteristics of systems change, equity literacy, building your network, and provide tools for participants to develop an action plan to use in your learning community.

100. Degrees, Not Debt

Asynchronous and Synchronous for group

Time: 1 hour

Education Minnesota's Degrees, Not Debt program is rallying public support to decrease the cost of college and make it easier and cheaper to pay student loan debt. We know that student loan debt makes life hard for many young educators, driving some away from teaching. Many see the cost of college as a barrier to getting into the profession in the first place. These challenges weaken the diversity and depth of our teaching corps. This course covers basic information about student loans and loan forgiveness programs and how to use them.

101. Engage Students with “Crossroads: An Anthology of Resilience and Hope by Young Somali Writers” (Live Recorded Session)

Asynchronous

Time: 60 minutes

This interactive presentation introduces the recently published book “Crossroads: An Anthology of Resilience and Hope by Young Somali Writers” as a resource for educators. Improve your own understanding of Somali communities’ strengths and challenges, and consider how this engaging, relatable, and diverse collection can further your learning objectives for all students. This presentation is brought to you by Eden Bart, Minnesota Humanities Center, and KC Harrison, University of Minnesota School of Social Work, and was recorded live at the 2020 MEA Conference on October 15th.

102. English Learners – Relicensure

Asynchronous
Learn to tap into the strengths the English Learners bring to your class. Discover strategies for differentiation and scaffolding to support their work as they progress through stages of language acquisition. For ESPs, teachers, and early career educators.

103. ESP Costing Spreadsheet

Asynchronous

Time: 60 minutes

This course will walk through the ESP Costing Excel spreadsheet. Options to customize the spreadsheet will be shown.

104. Finding Our Way Through: Navigating the Mental and Emotional Challenges of Our Current World (Live Recorded Session)

Asynchronous

Time: 60 minutes

It likely comes as no surprise that struggles with stress and mental health are on the rise. As educators, you are faced with unprecedented challenges and uncertainty about what is to come. Join Dr. Jenna Hobbs, a licensed psychologist, to explore strategies for coping with overwhelming anxiety, stress and depression that many of us are experiencing during this time of difficulty. We'll take a look at some helpful theories for understanding why it's so tough these days, and learn some tools to help you find your way through. We'll even do some guided relaxation and mindfulness together to give body and mind an opportunity to calm and restore. This session was recorded live on October 15th, for the virtual 2020 MEA Conference.

105. Google's Applied Digital Skills Workshop

Asynchronous

Time: 60 minutes

Google’s Applied Digital Skills is a free, video-based, and online curriculum that prepares students of all ages for the growing number of jobs that require basic digital skills. Applied Digital Skills is meant to spark students’ creativity and teach foundational computer science concepts in your classroom. In this hands-on workshop we will do a deep dive into the pedagogy and content behind Applied Digital Skills, then plan for implementation in your school or district. You will get to experience Applied Digital Skills as a student and explore the lessons that would best fit your students. This course is led by Education Minnesota member Jodi Johnson of Princeton, and was recorded live at the 2020 MEA Conference on October 15th.

106. Health Insurance Basics & Beyond

Asynchronous

Time: 60 minutes

Education Minnesota has developed this training as a response to the complicated topic that is health insurance. With rising costs and new laws in place, our members need to have a better understanding of health insurance.

107. Jim Crow of the North: Bringing Minnesota’s Diverse History Into the Classroom

Asynchronous

Time: 60 minutes

TPT’s Minnesota Experience history producers will present an exciting multimedia journey through Minnesota’s diverse history, illustrating how educators can use documentaries like Jim Crow of the North to amplify Minnesota’s
diverse stories, create deeper connections with all cultures, and make this history relevant for the challenges we face today. This session was recorded at the 2020 MEA Conference on October 15th, and is hosted by Daniel Bergin, Katie Carpenter, Marguerite Mills, and Kirsten Delegard.

108. LGBTQ+ Introductory Training

Asynchronous

Time: 60 minutes

In this introductory training, participants will learn important vocabulary in regards to gender and sexual orientation. Participants will learn about pronouns and inclusive language, with tangible ways to support LGBTQ+ students. This is part 1 of 2 trainings; look for part 2 on MEA Online in the future.

109. Meet and Confer

Asynchronous

Time: 60 minutes

The Meet and Confer course will provide you and your team with Minnesota Statutory requirements, Meet and Confer meeting best practices, and possible Meet and Confer topics.

110. Moving Lives Minnesota: Student-Driven Storytelling Around Immigration (Live Recorded Session)

Asynchronous

Time: 60 minutes

Moving Lives Minnesota explores our cultural heritage and the histories of communities who have called Minnesota home. Educators will learn about this Minnesota Public Television Association initiative, discuss best practices for student-led media creation, receive lesson plans and ways to be involved, have hands-on practice telling their own immigration story. This live, recorded session is hosted by Leah Defenbaugh and Kevin Yang, Twin Cities PBS, and took place at the 2020 MEA Conference on October 15th.

111. MRA I: Member Rights Advocacy

Asynchronous

Time: 3 hours

This training will help you develop knowledge and skills to assist colleagues in resolving issues using a variety of options and strategies.

112. MRA II: Member Rights Advocacy

Asynchronous

Time: 5 hours

To develop knowledge and skills to assist colleagues and resolve issues using a variety of options and strategies. This class is for members who have taken MRA I.

113. MRA III: Member Rights Advocacy

Asynchronous

Time: 3 hours

This course is a follow up to MRA I and MRA II. We will focus on the basics of organizing, representing a member at a meeting and processing a grievance.
114. Muslims in the Classroom: Practical Advice for Educators

(Only available in MEA Online until November 25th. After November 25th contact John Emery, Executive Director, Islamic Resource Group, john@irgmn.org, 315-521-1251.)

Asynchronous

Time: 60 minutes

Learn the basics of what impacts Muslim students and their daily lives in the classroom. Aspects of diet, dress, gender relations, prayer, fasting, and Muslim holidays are integral to this topic. The workshop is meant to help identify and address Islamophobia and Islamophobic bullying in the classroom. With these tools, educators will be able to better support Muslim students and families. This live session was hosted by John Emery, executive director of Islamic Resource Group, at the 2020 MEA Conference on October 15th.

115. Negotiating Equitable Benefits & A Family Friendly Workplace

Asynchronous

Time: 60 minutes

You will learn about various statutory leaves and the benefits and limitations of those leaves.

116. Negotiations Resources: Online Data & Information to Support Bargaining

Asynchronous

60-75 minutes

Are you new to your bargaining team, or new to doing research in support of bargaining? Familiarize yourself with the negotiations tools available on the websites of Education Minnesota, government education departments, the American Federation of Teachers and the National Education Association, and other resources around the web. You will learn to use resources that will assist your local do the research necessary for bargaining. Tools include a contract language search engine, data on demographics and funding, survey tools and economic data.

117. Positive Behavior Interventions & Instructional Strategies – Relicensure

Asynchronous

Time: 60 minutes

In this course, participants will learn about positive behavior interventions as well as instructional strategies.

118. Public Employees Insurance Program (PEIP)

Asynchronous

Time: 45 minutes

This course is an introduction to the Public Employees Insurance Program or PEIP. PEIP is a state run health insurance program designed to offer a pooled health insurance option to all Minnesota public employees. The PowerPoint is narrated by Shawn Byrne who works with Innovo Benefits which is the third party administrator for PEIP.

119. Reading – Relicensure

Asynchronous

Time: 1 hour

Participants will review the research and exemplary practices that help students acquire strong reading comprehension skills. For ESPs, teachers, and early career educators.
120. Rethinking Bargaining Surveys (CBOC 2021 Recording)

Asynchronous

Time: 60 minutes

Bargaining surveys are a staple in the negotiations process, but are they the best way to get information about members’ needs, priorities and values? In this session, participants will explore alternative methods for gathering information that define bargaining priorities. Participants will also examine how surveys can be used later in the bargaining process to create a cycle of communication between members and their bargaining team. Audience: Teachers and ESPs

121. Social Media, Legal Issues for Educators

Asynchronous

Time: 20 minutes

In this course, the learner will consider the do’s and don’t’s of using social media platforms both personally and professionally.

122. Student Mental Health – Relicensure

Asynchronous

Time: 1 hour

This session raises awareness of key warning signs for early onset mental illness in children and adolescents and includes strategies for addressing learning challenges faced by students with particular mental health challenges.

123. Suicide Prevention - Relicensure

Asynchronous

Time: 60 minutes

In this course, you will learn tools for suicide prevention. Learn about myths and truths related to suicide, warning signs, and what to do and what not to do when you are concerned someone may be contemplating or planning suicide. This course qualifies for relicensure requirements.

124. Taking Effective Notes in Bargaining and Member Meetings

Asynchronous

Time: 60 minutes

This course is focused on the importance of taking effective notes during bargaining and meetings with members. This course will also focus on understanding the differences in each situation.

125. Three Frames of Unionism

Asynchronous

Time: 60 minutes

Learn about how effective unions have evolved to include three different frames of unionism. As you work at your own pace you will familiarize yourself with the three frames of unionism, examine your own draw to unionism and apply these frames to the outreach we make to our students, staff and communities.

126. Using Membership to the Max: Member Benefits

Asynchronous

Time: 60 minutes
ESI strives to make Education Minnesota members lives better. We empower members to maximize their hard earned dollars, plan for the future and protect themselves and their loved ones. In this session, you will learn about different benefit options and how to access information on a state and national level.

127. Virtual Negotiating: Moving Bargaining Online (CBOC 2021 Recording)

Asynchronous

Time: 60 minutes

The COVID-19 pandemic has required flexibility and adaptability in everything, including our union work. This session will provide guidance and practical hands-on experience on moving traditional bargaining and preparation to a virtual bargaining format. We will present ways to optimize the use of online meetings and tools that can advance discussions. Audience: For ESPs and Teachers

128. Wealth Inequality and the Impact on Public Education

Asynchronous

Time: 90 minutes

What you need to know about the current wealth inequality in America, funding our schools, corporate education reform and what we can do to change it.
Education Minnesota Core Training FAQs

Education Minnesota's Core Trainings are focused on building strong, effective locals. This statewide program builds on the strength within locals to help build a solid foundation for success. The trainings give leaders and members information and skills in five important areas: member rights, negotiations, local organizing, health insurance and peer review. Education Minnesota staff facilitate each training opportunity. A trainer must be assigned by Education Minnesota staff before a Core Training Request Form is submitted.

Where and when are Core Trainings offered?

Core Trainings are offered through regional intermediate organizations (IOs) and locals. As they develop their yearly programming, IOs/locals are encouraged to consider sponsoring Core Training events to benefit their members and leaders. IOs/locals contact field office staff to have their Core Trainings placed on the Core Training master schedule. IOs/locals publicize the Core Trainings in their area of the state.

Who may attend Core Training?

Members should check the Core Training master schedule on the Education Minnesota website for Core Trainings offered in various parts of the state (educationminnesota.org/Advocacy/UnionU/core-training). Education Minnesota field staff also have this information. Any member of Education Minnesota may attend any Core Training event.

What is the reimbursement from Education Minnesota?

To expand participation to as many members as possible, Education Minnesota reimburses an IO/local up to $30 for each Education Minnesota member completing a five-hour Core Training segment. This reimbursement is meant to offset part of the cost of sponsoring a training event (food and meeting room rental, for example). Copies of expenditure receipts are required for reimbursement. The minimum of 10 participants to receive reimbursement has been removed.

How does an IO/local request this reimbursement?

An IO/local must promote its trainings to all Education Minnesota members through the Core Training master schedule. At the training event, all participants must sign the Core Training registration reimbursement form, indicating the name of their local. Field OPS are responsible for confirming membership of reimbursable attendees. After the training, the IO/local president/chair must sign the form and return it to Education Minnesota's St. Paul office, Attn: Shirley Roeber, 41 Sherburne Ave., St. Paul, MN 55103.

How does my local benefit from Core Trainings?

- Members develop the ability to advocate for other members through Member Rights Advocacy (MRA) training.
- They learn to prepare for and participate in contract negotiations via the Certified Negotiator Program (CNP) for teachers or ESPs. Some members might also attend CNP to help them decide whether to become a local negotiator.
- They learn to build power among members, demonstrate member unity and grow community support in the Local and Community Action Team (LCAT) program.
- Members learn to train their local colleagues on giving and receiving valuable feedback on their teaching in Peer Review: Strategies for Success.
- Members will acquire knowledge and skills to advocate for quality health insurance for their local through Health Insurance Basics and Beyond.
- The result of completing the Core Training is a stronger and more vibrant local union.
Core Training Reimbursement Opportunities

Core Training opportunities qualifying for reimbursement are:

1. Certified Negotiator Program (CNP) Parts I and II (10 hours total)
   - Part I for teachers (5 hours)
   - Part II for teachers (5 hours)
   - Part I for ESPs (5 hours)
   - Part II for ESPs (5 hours)

2. Health Insurance Basics and Beyond
   - Health Insurance (5 hours)

3. Local and Community Action Team (LCAT) Parts I and II (10 hours total)
   - Part I (5 hours)
   - Part II (5 hours)

4. Member Rights Advocacy (MRA) Parts I, II and III (15 hours total)
   - Part I (5 hours)
   - Part II (5 hours)
   - Part III (5 hours)

5. Peer Review: Strategies for Success (5.5 hours total)
   - Peer Review (5.5 hours)

The following pages contain descriptions of each Core Training segment. Also included are space and setup requirements to help your intermediate organization/local choose the trainings that fit your members’ needs. Education Minnesota is committed to training that builds local strength, protects members’ rights and teaches the skills to negotiate good contracts.
Certified Negotiators Program (CNP)
(also available asynchronously)

**Space requirements**

- Room needs adequate space to allow participants to easily move about for group activities.
- Space is needed for breakout sessions during negotiations practice component, ideally two separate but adjoining rooms.
- Wall space must be adequate for bargaining timeline, posters, flip charts.
- Participants must be able to see a viewing screen and to work in groups; round or conference-style tables preferred.
- A screen or blank wall is necessary for viewing projected images and print.
- An internet connection is required for the AFT LeaderNet Survey Creator training.
- A table must be placed near one entrance for sign-in sheets, nametags and table tents.

**Set-up time**

- Schedule ample time for presenter(s) to arrange room, put up posters, set out participant materials, test AV equipment and sign in participants.

**Other requirements**

- Sponsoring IO/local provides meals, snacks, meeting space, nametags and table tents.
- Education Minnesota provides the training materials and presenters.

**CNP for ESPs and Teachers – description**

Negotiators acquire knowledge and skills to lead their locals to settlement. There are two separate versions of Certified Negotiators training. One is designed for teacher negotiators; the other for ESP negotiators. Each version is made up of two five-hour components. The complete 10-hour training can be done on a Friday night and Saturday. The training is interactive, and group participation is expected.

**CNP for ESPs Part I – overview (5 hours)**

- Public Employment Labor Relations Act (PELRA)
- Bargaining team dynamics
- Member surveys
- Researching contract language and cost of living data

**CNP for ESPs Part II – overview (5 hours)**

Participants must complete CNP for ESPs Part I before Part II.

- Costing proposals
- Bargaining scenario
- Bargaining communications
CNP for Teachers Part I – overview (5 hours)

• Public Employment Labor Relations Act (PELRA)
• Surveying members
• Loonsville survey results activity
• Research and resources
• Loonsville research
• Costing

CNP for Teachers Part II – overview (5 hours)

Participants must complete CNP for Teachers Part I before Part II.

• Practice revisited
• Balancing trustee and representative
• Bargaining team dynamics
• Preparing a proposal
• Presenting a proposal to the district
• Closing the deal
Health Insurance Basics and Beyond (also available asynchronously)

**Space requirements**
- Room needs adequate space to allow participants to easily move about for group activities.
- Wall space must be adequate for timeline, posters and flip charts.
- Participants must be able to see a viewing screen and to work in groups; round tables preferred.
- A screen or blank wall is necessary for viewing projected images and print materials.
- A table must be placed near entrance for sign-in sheets, nametags and table tents.

**Set-up time**
- Schedule ample time for presenter(s) to arrange room, put up posters, set out participant materials, test AV equipment and sign in participants.

**Other requirements**
- Sponsoring IO/local provides meals, snacks, meeting space, nametags and table tents.
- Education Minnesota provides the training materials and presenters.

**Description**
Education Minnesota has developed this training as a response to the complicated topic of insurance. With rising costs and new laws in place, our members need to have a better understanding of insurance in general and how it works. Participants will gain knowledge around the various components and terminology of insurance, the laws that deal with insurance, and the skills necessary to make comparisons between insurance plans, as well as how to utilize a district insurance committee to its maximum potential. Topics covered in this training include group insurance, legal rights and responsibilities, side-by-side comparisons and an effective insurance committee.
Local and Community Action Team (LCAT) Training

Space requirements
- Room needs adequate space to allow participants to easily move about for group activities.
- Space is needed for breakout sessions for organizing conversation training; ideally two separate but adjoining rooms.
- Wall space must be adequate for timeline, posters and flip charts.
- Participants must be able to see a viewing screen and to work in groups; round tables preferred.
- A screen or blank wall is necessary for viewing projected images and print materials.
- A table must be placed near entrance for sign-in sheets, nametags and table tents.

Set-up time
- Schedule ample time for presenter(s) to arrange room, put up posters, set out participant materials, test AV equipment and sign in participants.

Other requirements
- Sponsoring IO/local provides meals, snacks, meeting space, nametags and table tents.
- Education Minnesota provides the training materials and presenters.
- Training can be scheduled on a Friday night and Saturday or over the course of two to three evenings.

Description
The LCAT program helps locals with internal organizing and community engagement campaigns. The goal is to build positive, sustainable relationships among educators and those who live and work in their communities. Locals do this by creating teams that include local leadership, negotiators, members of settlement committees and those with an interest in organizing in their schools and communities. Training sessions are offered to give teachers and ESPs foundational skills to help their local union build power and reach their goals. Participating local teams should consist of at least one member of the bargaining team, one member of the local’s leadership group and two additional members who will become part of the Local and Community Action Team. The complete 10-hour training can be done on a Friday night and Saturday. The maximum number of participating local teams is six.

LCAT Part I – overview (5 hours)
- STEP Analysis: The environment in which we work, live and negotiate
- SWOT Analysis: Internal analysis of the local’s strengths, weaknesses, opportunities and threats
- Building an LCAT
- Identifying organizing issues

LCAT Part II – overview (5 hours)
Participants must complete LCAT Part I before Part II.
- One-on-one conversations
- Planning your campaign
- Next steps
Member Rights Advocacy (MRA) (also available asynchronously)

**Space requirements**
- Room needs adequate space to allow participants to easily move about for group activities.
- Wall space must be adequate for hanging posters.
- Participants must be able to see a viewing screen and to work in groups; round tables preferred.
- A screen or blank wall is necessary for viewing projected images and print.
- A table must be placed near entrance for sign-in sheets, nametags and table tents.

**Set-up time**
- Schedule ample time for presenter(s) to arrange room, put up posters, set out participant materials, test AV equipment and sign in participants.

**Other requirements**
- Sponsoring IO/local provides meals, snacks, meeting space, nametags and table tents.
- Education Minnesota provides the training materials and presenters.

**MRA Part I – description**
MRA Part I is an introduction to the role of a member rights advocate. Participants develop the knowledge and skills to assist other members in understanding their rights and resolving conflicts using a variety of strategies. The training is interactive, and group participation is expected.

**MRA Part I – overview (5 hours)**

**Introduction**
- Attributes of a Member Rights Advocate
- Participants' experience timeline
- Rights/responsibilities of representing members
- Duty of Fair Representation (DFR)
- Advocacy model

**Valuing member concerns**
- Conflict definition
- Thomas-Kilmann conflict style inventory
- Ladder of Inference

**Investigation**
- Five W's of inquiry
- Guidelines for effective interviews
- Making a record
- Potential resources
- Preparing the member

**MRA Part II – description**
Participants must complete MRA Part I before enrolling in Part II. In MRA II, participants develop skills to use various alternatives to grievances for resolving conflicts. Participants develop additional knowledge and skills to assist other members in understanding their rights and resolving conflicts using a variety of strategies. The training is interactive and group participation is expected.

**MRA Part II – overview (5 hours)**

**Introduction**
- Part I review
- Situation activity

**Defining the issues**
- Differentiating factors of an issue
- Accompanying a member to a meeting

**Decision making**
- Member Rights Advocate as problem solver
- Issue activity
- Role of organizing in problem solving
- Options overview
- Grievance definitions and timelines
- Negotiations
- Meet and confer
- Mediation
- Legal
- Government relations
- Organizing strategies activity
- Brainstorming activity
- Skill-building activity

**MRA Part III – description**

Participants must complete MRA Parts I and II before enrolling in Part III. MRA III uses participants’ knowledge and skills from Parts I and II, and focuses deeply on three topics: Organizing, representing a member in a disciplinary meeting and grievance processing. The training is interactive, and group participation is expected.
MRA Part III – overview (5 hours)

Introduction
• Warp Speed activity
• Basics of organizing
• Organizing skills practice
• Organizing attributes

Representing a member in a disciplinary meeting
• Before the meeting, advocate's role, preparation
• The right to representation, NLRB, Weingarten and other warnings
• Skills practice: Role of the representative
• Skills practice: During the meeting
• After the meeting
• Solutions scenario

Grievance processing
• Preparing for a meeting with the district
• Skills practice: District meeting
• Writing a grievance
• Other options
Peer Review: Strategies for Success

Space requirements
- Room needs adequate space to allow participants to easily move about for group activities.
- Wall space must be adequate for hanging posters.
- Participants must be able to see a viewing screen and work in groups.
- A screen is necessary for viewing projected power points and documents.

Set-up/take-down time
- Schedule 90 minutes for presenters to arrange room, materials and technology. Schedule 45 minutes for take-down.

Other requirements
- Sponsoring IO/local provides meals, snacks, meeting space, nametags and table tents.
- Education Minnesota provides the training materials and presenters.

Description
Peer review training uses a "train-the-trainer" model to enable locals to develop their own training programs for teacher observation and feedback. Peer review programs can then be adapted for locally designed teacher development and evaluation (TDE) plans. Teams of at least two people will receive the resources and materials necessary to support further peer review training in their districts.

Overview (5.5 hour session)

Introduction
- Legislative requirements
- Research review
- Establishing context

Foundations
- Review of observation models
- Review of feedback models
- Adapting observation model to Teacher Development and Evaluation (TDE) plan
- Adapting feedback model to Teacher Development and Evaluation (TDE) plan

Applications
- Facilitation techniques
- Facilitation tools
- Facilitation models

Conclusion
- Peer review implementation at the local level
Notes