

“Trust and Transformation: Integrating Two Florida Education Unions”

By

Sylvia L. James, Jack Carbone, Albert B. Blixt, and Jim McNeil

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THE CHALLENGE

How do you bridge a 30-year chasm of conflict between two competing organizations that must merge in order to survive? For the Florida Education Association (FEA), the challenge was enormous. The success of the FEA merger required bringing together two distinctly different cultures and healing old conflicts, wounds, history, and polarized philosophies of doing business. Conflict that continued was based on three fundamental cultural differences:

- Structures: centralized vs. decentralized
- Operating Styles: flexible and adaptable vs. traditional, hierarchical, and procedural
- Modes of Decision Making: direct vs. indirect participation by local union presidents

Four years after the official merger, FEA president Andy Ford, recognized that the integration process was not working. There was continuing conflict over future direction, how decisions were made, and the role and participation of key stakeholders. “We said we put it [the merger] together,” Ford says, “In reality we did what we needed to do to get the deal done in the beginning. We did not deal with the practicalities of integrating it.” The promise and opportunities of the new organization were not being realized. The real challenge facing FEA was building relationships and trust while designing structures and processes for the newly integrated organization.

BACKGROUND

The Florida Education Association split in the early 1970’s after nearly 100 years as a single organization. The two resulting unions engaged in bitter competition for members and influence until 2000 and the merger of: Florida’s American Federation of Teachers (AFT) and Florida Teaching Professions - National Education Association (NEA). The new organization represents more than 250,000 teachers and education staff professionals in Florida’s 67 school districts. A six year transition agreement was established.

In March, 2004, Ford commissioned a “Futures Committee” to recommend changes that would accelerate real integration and create a unified organization with a shared vision of the future. He appointed a cross-section of union presidents from both former organizations representing small, medium and large locals as well as members of the staff. FEA chose Whole-Scale® (footnote 1) as the transformation process to use

The Whole-Scale process involved a series of small and large group meetings that addressed both underlying conflicts and fundamental organizational and strategic issues that had proved intractable in the past (Figure 1). Among the major challenges were:

1. How to overcome, integrate, and transform twenty-six years of pre-merger and four years of post-merger culture into a new, single, cohesive culture.
2. How to build the trust that was needed for healing, cohesion, and forward movement.
3. How to accomplish this in the course of one year with only four Friday evening-Saturday sessions, and one 2.5 day session with a cross-section of 65 people who had other full-time jobs and assignments and were geographically dispersed.

Figure 1 about here

THE STORY

Futures Committee Meeting #1, March 2004: “To launch the Futures Committee together in a way that ensures it achieves its purpose.”

The challenge in the first meeting was to establish cohesion, a sense of purpose, and a charter for the Futures Committee. A set of processes, tools and methods were established in this first meeting that would continue throughout all the meetings:

1. Meeting planning process. A microcosm of Futures Committee created a purpose statement, desired outcomes and design for each meeting.
2. Converge/diverge group process. The design for the journey and for each meeting takes into account the need for small group work (e.g., study groups, meeting planning) and large group work that lets the system tap the wisdom of the whole, to make decisions, and to plan actions.
3. Emergent design. We provided the time to confront the issues, to change conversations/activities based on new data that surfaced and impacted achieving the meeting purpose and desired outcomes.
4. Building trust in every meeting. This required demonstrating that there were no hidden agendas in the process. Total transparency was required about how meetings were designed and willingness to hear all voices was demonstrated. We surfaced and worked on those things that occurred and were breaking trust or reinforcing the lack of trust.
5. Internal/external consulting team. To simultaneously see and process the complexity of this transformation requires a team. We built an internal/external consulting team to plan and facilitate this process. The team decided the timing and sequencing of activities and constantly assessed the state of the group.
6. Daily feedback and written evaluations. At every meeting, each participant completes a written evaluation at the end of the day. The planning team, leadership, and consulting team read these and make changes to the next day’s agenda. The next morning, a summary is shared with everyone to make the meeting totally transparent, build trust, share information on how to work differently, and make visible how the participants’ shaped the new agenda.

As the sixty-five members of the Futures Committee gathered for the first time at four o’clock on a Friday afternoon, the atmosphere ranged from caution to outright skepticism about what was about to happen. Most of the members were local union presidents and some were

FEA staff. Each president, elected to serve their local membership, would have to be convinced about the value of this group process.

The sixty-five were seated at round tables of eight. Seating was predetermined so that each table was a microcosm of the entire room: elected leaders from each of the former unions, different size locals, staff, and different occupations in education represented by FEA. President Ford and the Futures Committee Co-chairs convened the meeting, describing why this committee was formed, what it was intended to accomplish, and the way this group would work together to maximize participation.

The design of the meeting moved from creating common data to a vision of the future to first steps for action. Participants began creating a common database by introducing themselves, sharing their individual perspectives about their hopes and fears for this process, and agreeing on the outcomes they needed for this first meeting. Then, a merger history timeline was placed on the wall and everyone wrote their memories about the history of the merger. A whole group discussion followed about the events leading up to and following the merger and the feelings, experiences, and learning that came as a result.

Friday evening and most of Saturday morning was spent agreeing on a vision of themselves and their role as a committee. The framework for this discussion was the proposed group charter. The purpose of a group charter is to clearly identify the group's purpose, role, authority, tasks, and how it will do its work. After considerable discussion, a consensus was reached and the charter was adopted. "The purpose of the Futures Committee is to design a process to gain maximum input and participation from FEA elected leaders, constituency groups, members, potential members, FEA staff, and local staff in order to make recommendations to the appropriate governing bodies for change as we define our desired future."

Finally, as part of next steps planning, there was discussion on whether to have an all-stakeholder meeting in June in order to gather input on building a shared vision for the future direction of FEA. The group decided that it was not ready to sponsor the all-stakeholder meeting until the committee had more time to become familiar with the key issues to be addressed, the target audience for such a meeting, and the intended outcomes for it. They decided instead to reconvene as a committee for three days in June to continue the dialogue. Before adjourning, they agreed on outcomes and a series of questions to address at their June meeting, and selected members to work with the internal/external consulting team to plan the agenda.

Each person completed a written evaluation which was summarized and communicated to everyone. Participants described the most significant outcomes of the two days as: "We worked out several areas that could have derailed the process. Discussion of merger timeline (telling the story)." They responded to "What surprised you?" with "We came up with a timeline that had such impact... Personal agendas... How much everyone cares about FEA!" To maintain momentum, they recommended "Communication in the room; not the hallway. Don't let up."

Futures Committee Meeting #2, June 2004: The Uproar

The 2.5 day session that became known as "The June Meeting" was planned by a microcosm of the Futures Committee and facilitated by the internal/external consulting team. In

April, this planning team spent two days together creating a purpose statement, desired outcomes and a design for the flow of the meeting. The purpose statement was “To build a dynamic, committed and knowledgeable leadership team that creates a comprehensive work plan that will help shape the desired future of FEA.” The agenda that they created together was expanded into a “minute-by-minute” detailed design by the consultation team. That design was then shared with the microcosm planning team, and finalized based on their reactions and input.

Day One: As the June Futures Committee meeting was about to begin on Tuesday afternoon, the planning team alerted us that the “elephant in the room” was how voting had been handled at the May Delegate Assembly. The annual Delegate Assembly elects FEA leadership and votes on other business of the Association. Approximately 1000 delegates attended the 2004 Delegate Assembly (including all members of the Futures Committee) and several important issues were to be decided. A dispute arose over voting procedures. Confusion about the rules for voting had created dissention and many leaders felt they had been treated unfairly. During the first afternoon, there was obvious tension.

At the end of the day, the planning team reviewed the day’s evaluations which confirmed how significant the issue of trust was within the Futures Committee and within FEA. Many people felt that if the trust issue was not directly confronted, the work of the Futures Committee would not be productive. The planning team revised the event agenda to conduct dialogue on the main trust issues within the room and within FEA.

Day Two: The morning of the second day, the whole group discussed the sequence of events around voting at the Delegate Assembly. The original agenda included a morning activity to hear from the top official from each of the two national unions. The consultants described the situation and the urgent need to have a whole room discussion before everyone would be ready to listen. The national leaders quickly understood and endorsed the decision to engage in this conversation. The resulting conversation was spirited and free-flowing. People began to realize that the conflict surrounding the Delegate Assembly voting procedures was the result of both different perspectives and different amounts of information. As people began to feel heard, they agreed to move on with the agenda.

By mid-morning, the agenda resumed with “Expanding our View,” which included a look at the external forces and trends affecting the future of education and an internal view from small, medium, and large-size locals. Using this information, the entire group created a draft high level strategy for FEA including Mission, Values and Goals.

That evening, the microcosm planning team and the consultants sat down with the co-chairs to read the day’s evaluations. Despite the morning’s attempt to clear the air about the Delegate Assembly conflicts, we learned that one faction was holding a “meeting outside the meeting” that evening and others were holding frequent the huddles in the halls. The planning team members shared their own conflicts and emotions. They mirrored the larger organizational conflict. People were really bent out of shape and polarized about how they saw the sequence of events. There was incredible tension within each individual about their personal choice to demonstrate loyalty to their colleagues by attending the evening “meeting outside of the meeting” or whether to show support for the Futures Process by not attending and keeping all

conversations within the Futures Committee meeting. It was clear the conflict was still festering. Trust was still an issue. The events were analogous to the entire merger struggle: mistrust between the two former cultures, about inclusion (who was in, who was out), as seen in who had the information about how voting was going to take place at Delegate Assembly. Each side of the conflict felt that the other side had information it did not have. It appeared that the committee was suddenly unraveling. They were asking themselves, “What are we doing here? Why did some people have the information about the voting procedures and others did not? I’m not sure I want to be part of this group.”

The consulting team shifted the conversation to “how do we want to deal with this tomorrow morning?” The planning team realized that the conflict needed to be directly confronted. “We have to have this same conversation in the whole room tomorrow morning. Look what we have learned from each other tonight. Tomorrow let’s describe our conversation to the whole group. We’ll read the concerns expressed in the evaluations by some people about a ‘meeting outside the meeting’ being held off-site tonight.” Then the planning team and consultants redesigned Thursday’s agenda so that everyone could spend the next morning in a conversation about trust that paralleled the conversation which the planning team had on Wednesday evening. The planning team decided “We cannot talk at tables of eight. We must have a 65-person conversation so everyone hears everyone to begin to build the trust.”

Day Three. When the entire Futures Committee reconvened the next morning, the co-chairs talked candidly about the conversation the night before, how they felt personally, and how critical it was that we openly talk about the trust issue. In that moment, the room went silent. The consultants let silence continue. Then someone spoke. The group spent the next two hours in room-wide conversation. Sixty-five people “told their story.” Finally, the entire elephant was on the table and visible to all.

In the end, the group agreed to charter a sub-committee of the Futures Committee to review the events leading up to and during the Delegate Assembly on the issue of the voting procedures. The purpose was to draw learning’s and recommend changes to next year’s voting and communication process. The charter discussion defined conflict as occurring when “my expectations don’t meet yours.” Everyone wanted a voice in writing the sub-group’s charter. Having built enough trust to resume work in small groups, each table of eight discussed what had to be in that charter. These drafts were then consolidated in the whole room, resulting in a clear set of expectations for the sub committee. In “Advice to the Sub-Committee,” everyone stressed that this was not a witch hunt, not about placing blame, but about learning from it. For that reason, the sub committee was called the “Delegate Assembly Study Group”.

This was the critical turning point in the process and the catalyst that allowed the full process to play out successfully over the next year. After the group fully addressed the Delegate Assembly issue, everyone was able to set it aside and return to work on FEA’s Strategy. They reviewed the goals they had drafted the day before. Energy was high!

The evaluations for the June meeting reflected the hope that was restored. People described the most significant outcomes of the 2.5 days as, “start on honesty issues...bringing out issues that are still lurking...building the trust...discussing the undiscussables...more

comfort with people in the room.” To maintain momentum, they recommended “continue to work on the trust issue, keep talking, keep big picture in mind, and keep confronting the issues...”

Preparing for Meeting #3

The Delegate Assembly Study Group met for two days prior to the October meeting #3. Through a six-hour “Telling our Stories” process, they created a common picture of what actually happened in the Delegate Assembly. On the Friday evening, they planned to give their progress report to the entire Committee.

While the Delegate Assembly Study Group was meeting, a separate group created a visual of the year-long timeline of what needed to happen in order for recommendations from the Futures Committee to be voted on at the May 2005 Delegate Assembly. While the Futures Committee was a microcosm of the system, their work had to go through the normal approval channels in order to adhere to FEA’s constitution and bylaws as well as state and federal labor regulations. Since the approval process was not commonly understood by all Futures Committee members, this timeline would be shared at Meeting #3.

Futures Committee Meeting #3, October 2004: Work on Real Issues

By the third meeting, trust levels had reached a point where the group could begin tackling the real work of planning for the future of the Association. The October meeting began Friday evening with the Delegate Assembly Study Group telling their story. The report was very positive in terms of the process and telling the story. The Study Group shared how they had spent most of the first day talking about and agreeing to ground rules for how the conversation was going to take place by continuously asking themselves “How are we going to have the conversation with each other so others can hear?” The conversation to agree on ground rules helped create a safe place for people to begin telling their stories about the events surrounding the Delegate Assembly voting conflict.

The Study Group members described how they spent two days reconstructing the sequence of events leading up to and at the Delegate Assembly. They told it as a story. They talked about how they had worked together, what they had learned, and how they had finally converged on a picture that explained but did not blame. Flipcharts captured all the information from their conversations and filled two walls in the meeting room. When the rest of the Futures Committee saw how this diverse group was connected, energized, and honest with each other; there was a palpable shift in attitude and affect from lurking distrust to excitement.

Saturday, working as a whole group, the Futures Committee finalized the strategy and turned its attention to the ongoing debate surrounding “organization governance”. Many considered the current structure ineffective and onerous. The multi-level structure made up of Executive Officers, Governance Board, Executive Cabinet and Delegate Assembly had been created in order to facilitate the merger not necessarily to best manage the organization. Because of general dissatisfaction, this issue had been flagged by the FEA President as one area that needed to be reviewed. Most others agreed.

Opening up discussion of governance also opened up the possibility that some forces would gain power and influence while others would lose it. Passions ran high and ulterior motives were suspected. The challenge was to discuss the issues in an open and honest way and arrive at solutions that would be supported by the rest of the organization.

Creating a Governance Study Group. By now, the Futures Committee had become more willing to trust smaller groups to tackle specific issues and bring back recommendations for the whole group's consideration and approval. They identified a subgroup of fourteen Futures Committee members and called it the Governance Study Group. Members were nominated and chosen by the full Futures Committee based on the following criteria that properly reflected the various interests within the organization: small, medium and large locals; elected and staff; governance levels; gender/ethnic diversity; opinion diversity; historical perspective; people without historical perspective; constituency group representatives; and non-presidents. Once the group was chosen, a charter was developed by the entire Futures Committee, through table work and then whole group agreement (Figure 2).

Figure 2 about here

The next step was to solicit input from the entire Futures Committee. We asked them at their tables to identify the issues that the Governance Study Group needed to address for each of the four governing levels (Executive Officers, Governance Board, Executive Cabinet and Delegate Assembly) in order to serve the organization's needs 3-5 years into the future and those that must be brought to the Delegate Assembly for approval in May. This process generated nearly a hundred responses which was the basis for the work of this committee. They voted on which issues were most critical and which recommendations were most powerful.

We suggested using Interest Based Problem Solving (footnote 2) as the process for exploring governance issues because it was familiar and favorably viewed by most FEA members. Interest Based Problem Solving (sometimes known as Win-Win) had been used in several contract bargaining sessions. The underlying principles of Interest Based Problem Solving had provided ground rules for the all-room discussion in the highly-charged June meeting. The committee trusted that these principles would again provide a healthy, shared framework for the governance discussions. To support the study group, they agreed that it would be facilitated by one external consultant and one trusted staff member, both experienced in Interest Based Problem Solving. Choosing a familiar and trusted process led by experienced and neutral facilitators laid a foundation for the Governance Study Group that was open, transparent, and trusted by all Futures Committee. Equipped with both a structured way to safely explore options and a means to listen and learn from each other, the group was ready to engage in meaningful dialogue.

The Governance Study Group and the Futures Committee Meeting # 4, December 2004/January 2005 : Recommending Constitutional Changes

There were two Governance Study Group sessions, each three days, using the Interest Based Problem Solving process to fully deliberate the issues and arrive at recommendations. Once completed, the sub-committee's recommendations were brought back to the full Futures

Committee for discussion in their January meeting. The final recommendations contained significant constitutional changes in the election of union leadership, policy making responsibilities, and alignment of organizational structure and decision-making. Remarkably, all recommendations were adopted, with only one Futures Committee member voicing disagreement. Meeting #4 ended with a group commitment to support all the Governance Study Group's recommendations through the required approval process. They planned how they would present these recommendations to the Governance Board for review and action starting at the Governance Board's January meeting. Given the level of mistrust and differing opinions in the beginning of this process, the Futures Committee talked about how they had succeeded in staying true to their values and principles while forging a plan for the future.

Interim Work. A cross section of the Futures Committee presented all the recommended constitutional changes at the January Governance Board meeting. Modeling the interactive processes they had learned, after they presented, Futures Committee members asked the 150-person Governance Board, in their small groups, to discuss what they had heard and their reactions, and to identify their questions of understanding. Then they facilitated a whole group open forum. A Futures Committee member, who was also a Governance Board member, was seated at each table for the small group conversations to provide background and answer questions. The Governance Board was the final decision maker on which recommendations of constitutional changes would be voted on at the May Delegate Assembly. Even though they did not have to agree on this until their March meeting, that January day 150 member Governance Board recommended the Futures Committees' proposal to the Delegate Assembly as a complete package! In addition, they agreed to integrate the work of the Futures Committee into the Governance Board, adopting Whole-Scale processes as their new way of leading as a strategic body. They saw the possibility of their own meetings becoming meaningful and participative.

Futures Committee Meeting # 5, February 2005: Transitioning and Widening the Circle

This meeting began the transition of integrating the Futures Committee into the Governance Board. They broke into small groups to create a charter for the new role of the Futures Committee, to create plans to engage the rest of FEA in understanding the recommended constitutional changes that would be voted on at the Delegate, and to plan their own presentation at the Delegate Assembly.

The evaluations from the February meeting are the Futures Committee's powerful testimony of their learning journey to alignment and commitment. Their responses to "What were the most significant outcomes of the 11-month Future's Committee experience." included: "To see FEA moving forward with a positive attitude, it's made me a better leader, gaining new and wider perspective, building of meaningful and trusting relationship, the growth in trust and listening, really listening to each other, validation, an ability to hear both sides, being given a process to have difficult/important discussion and a way to come to resolution, the recommendation of changes were well thought out and good for the organization, the idea of ALL voices being seen and heard, alignment of purpose and structure..."

When asked, "On a scale of 1-10, how comfortable are you that your opinions were considered in shaping the committee's recommendation?" the average response was 9.3! This

was a tremendous leap from an average response of 6.9, eleven months earlier to “How confident are you that we will carry out our commitments to each other.”

THE RESULT

In May 2005, the FEA Delegate Assembly was presented with the recommendations. Nearly 80% of the 1000 delegates voted to accept the changes to strategic goals, budget, governance structure, and dues. In the words of one leader, “This process has transformed our union for the better.”

In June 2005, the 150-member Governance Board, in a two-day meeting planned by a microcosm, “relaunched” itself, using the participative processes to agree on strategic objectives for the next 15 months, to identify the subgroups to get started, and to tackle “hot topics” that required real-time conversation and action. They described the meeting as “the best we’ve ever had...first time I ever held a microphone...Being able to speak my voice to the concerns of the organization...Met more of the Governance Board members and heard their perspectives by thinking in large group process...information for everyone, regardless of size...I believe in this process.” They wrote recommendations to the microcosm planning team that would design the agenda for their next meeting. FEA has a shared process to sustain its organizational learning.

REFLECTIONS

Reflections describes what we, the internal and external consulting team, learned about the trust that had to be built within the transformation infrastructure in order to sustain success. We decided to write Reflections from the “view of the internal consultant” in order to stimulate thinking about additional ways external consultants might support the internal consultant.

1. Help leadership manage the anxiety about the process and the uncertainties.

Having committed leadership and supporting the leaders in their commitment was critical to the on going success of the project. The greater challenge was helping the president and co-chairs manage their anxiety as they headed off into the unknown. FEA President Ford was determined to make it work! Like any leader, he took a leap of faith in the beginning. He wanted to engage others in redesigning the merged FEA, but he did not know what the process would hold, how it would unfold, or what the outcome would be. He knew the risks. His appointments to the Futures Committee put the key personalities, opinion leaders, and resisters into one room, a potentially volatile mixture. He realized the potential for him to become the target for all the pent-up anger and frustration. Ford understood the risks but was willing to accept them in order to integrate the merger and build a strong, united organization. His commitment would be seriously tested if the process spun out of control and the polarization intensified so that FEA split apart yet again. He knew that, if he wavered and/or walked away from the process, it would send the signal that the merger was not salvageable.

At several points, Ford was feeling ready to give it up. There were a number of reasons for his feelings: the uncertainty about where it was all heading; the feeling of loss of control and predictability; the apparent lack of clear, definable outcomes; challenges to his leadership; and an organizational culture that did not confront differences and conflict openly and directly. The

organization's culture was used to working in linear and predictable ways. Conflict, when it was confronted, usually resulted in a 'win/lose' result. The fact that conflict and chaos were necessary and that they preceded any sense of order was unsettling. From the beginning, I continuously nurtured Ford's commitment by building trust and maintaining credibility with him so that he believed we could many any uncertainly and that we had the skills and experience to help the group through anything that emerged. I was candid about the realities. I focused on helping Ford feel knowledgeable and have the information to answer the inevitable push back and questioning he would get from committee members. In addition, I ensured that the president and the co-chairs stayed connected as a team, by bringing them together to share information, anxieties, and expectations.

The June meeting 'uproar' tested both Ford's and the Futures Committee's resolve to continue. Everyone emerged hopeful about the process. At the same time, the Delegate Assembly Study Group which was an outcome of the June meeting put Ford dead center of the lingering controversy. In conversations I had with him before the Delegate Assembly Study Group meeting, I learned how anxious he was because he would have to relive all the events and he could become the target for all the dissatisfaction and anger, even though the Study Group's charter described that the purpose would be to learn and to make recommendations, not to place blame. Through our conversation, he regained trust that we would design the Study Group meeting in a way that all the information could be shared in non-threatening ways, constructively, with ground rules. I continually made sure he was informed about what the design was, what his role would be, and what he needed to do at any given moment to support the process.

The next test for Ford was in October, when the entire Futures Committee would decide who would participate in the Governance Study Group. It was the moment when it became clear what "control" and "being participative" really look like. Again Ford confided that he felt he had lost control of the process and his constitutional authority as president because he had no control over the task and the composition of the group. I continued helping leadership understand how uncertainty and temporary chaos are part of the process and how staying focused on purpose is critical to keeping it all going.

Another insight was that Ford needed to be in the room for all these sub-committee conversations, even though he was not part of the decision making. In the early stages, he chose to stay out of conversations, to turn this process over to the large group so he would not be seen as manipulating this process or having a hidden agenda. With our nudging, by December he was comfortable being with the Study Group, contributing to conversations without controlling the outcomes.

If Ford had felt, at some point, that he did not trust me in this process or that I was working some other agenda, or that this was just too volatile, too unpredictable, and that these consultants did not really know what they were doing, then this would have all been different. As I look back, I'm glad I was candid and kept confronting and challenging the president and co-chairs. I'm glad I kept constant reality checks with the co-chairs and president to keep them grounded in what was going on, grounded in the process; at the same time building the trust level

and credibility in the process so that in time he would say, “well these folks know what they’re doing...and in the end it’s going to be okay.”

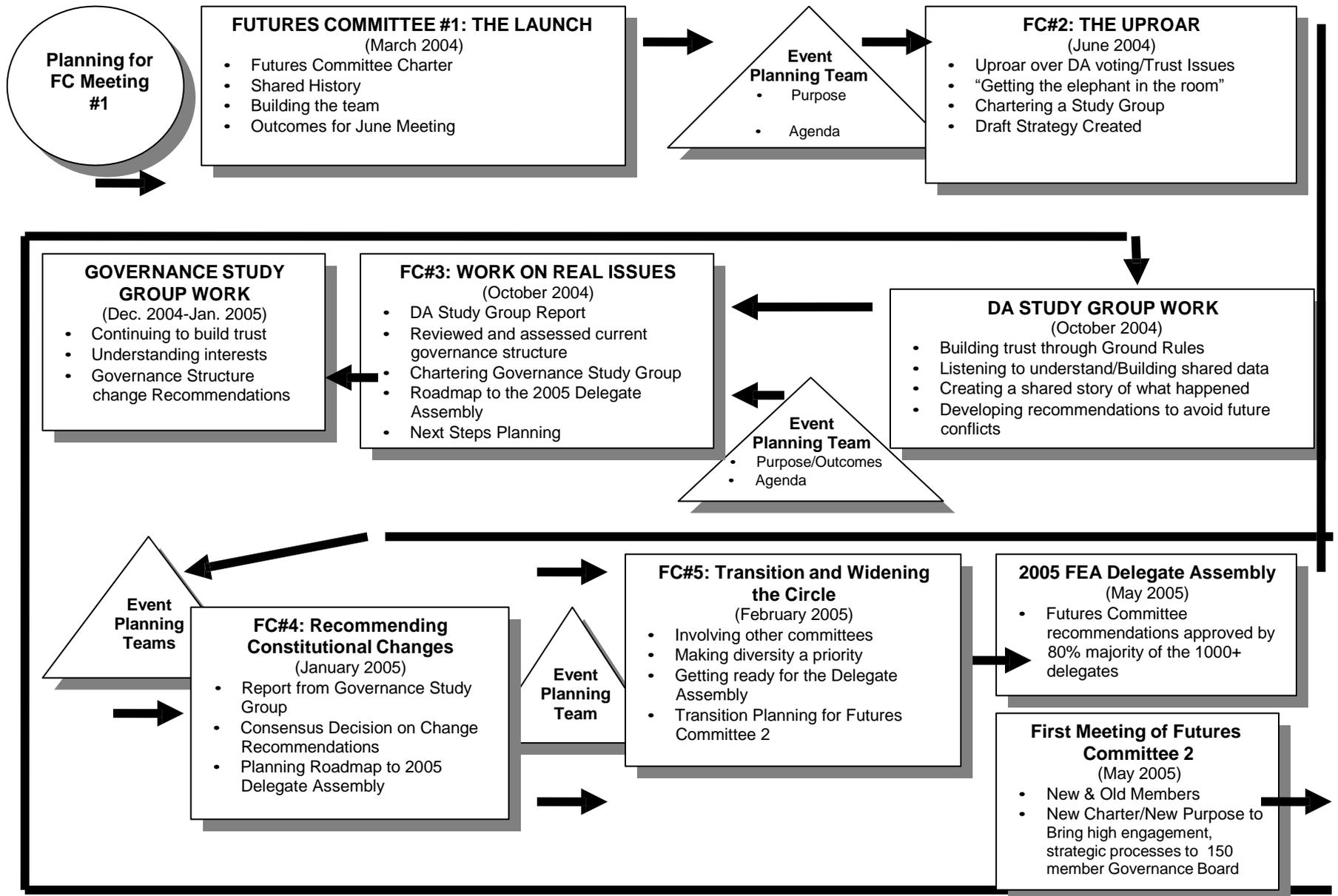
2. Work at staying calm. In order to build trust and maintain hope and perseverance within the leadership, as an internal consultant, I had to have confidence that the process was going to work. I could have just as easily gotten derailed when those bumps in the road surfaced. I told myself “Stay calm. Do not react to everything.” Then I had to take my own leap of faith. Sometimes it did feel scary and dangerous working on the edge of chaos. In addition to confidence in the process, I had to have perseverance, mechanisms that ensured that no one would get hurt, and processes that kept the leadership committed through the process—educated, confident and comfortable with the push-back that would come from whatever direction. In the earlier days, I would have panicked and said, “This isn’t going to work! How do we get out of this gracefully? Instead I said, “This *is* going to work. It will all come out in the end,” and it did! It helped to partner with external consultants who have experience in doing this, who have flexible design processes, who value enabling the system to reach its own solutions, and who are committed to transferring their methodology. We built a relationship where I trusted them to support me internally and to keep me on track. At times when I had to say, “No I do not have the skill level to do xyz. That’s why we have you here.”

3. Build critical mass with capacity to facilitate and lead change. If the Futures Process was to be more than an event, then we had to approach our role as one helping to build the system’s capacity to sustain the changes for doing work differently. Learning was ongoing, experiential and grounded in the ‘real’ work of the organization. It included everything from learning how to design high engagement meetings, to developing skills for dialogue and reaching consensus, to clarity about roles and responsibilities. We learned how important it is to transfer processes and underlying principles to a critical mass of leaders by making transparent everything we were doing to design and facilitate meetings. When the Futures Committee took their recommendations to the Governance Board, they designed the meeting using the processes they had learned from their own highly participative meetings. By sharing the process, they demonstrated transparency and openness. In turn, the Governance Board experienced how a large group can work together to create results and adopted Futures Process as a way of designing and leading their own 150-person meetings. Several presidents are using these processes in their locals, and many others now attend FEA workshops on “Futures Process.”

Footnote #1: Whole-Scale® is a registered international trademark of Dannemiller Tyson Associates , Whole-Scale is an approach to organization and community change that provides theories, models, tools and processes which engage whole systems in positive change through small and large group meetings (involving 6 to over 2500 people). Whole-Scale approach engages microcosms of the organization in creating and implementing real-time solutions. The outcome is accelerated change, rapid implementation, and a critical mass of energetic people ready to move forward. Learn more about Whole-Scale at www.dannemillertyson.com

Footnote #2: Interest Based Problem Solving, (IBPS), also called "win-win," or "principled" bargaining, is based on deciding "issues on their merits rather than through a haggling process focused on what each side says it will or won't do." (Fisher, Ury, p. xviii) The methods are devised to obtain wise, durable agreements, efficiently and with good will. They allow participants to escape the trap of either being hard and adversarial or soft and ineffective. There are four key elements to the method: 1) Separate the people from the problem. Be soft on the people, hard on the problem; 2)Focus on interests, not positions; 3) Invent multiple options for mutual gain to choose from and decide later; and 4) Insist on using objective criteria and reach results based on standards independent of will. Yield to principle, not pressure. The method requires a more structured process than traditional positional bargaining, but this up-front effort pays off as the parties find good solutions neither had previously considered.

Figure 1 – Trust and Transformation: Using Whole-Scale Processes to Integrate Two Florida Education Unions



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Figure 2
Governance Study Group Charter

PURPOSE: To accelerate Futures Committee work on governance structure by developing draft changes to the Constitution & Bylaws

DELIVERABLES:

- Draft change language
- Rationale changes
- Const
- Transition thinking

DEADLINES – WORK PLAN:

- Feedback process to Futures Committee Nov-Dec?
- Futures Committee – Jan 7-8
- Gov Bd Mtg January 28-29

GIVENS – BOUNDARIES

- Align with FEA Mission, Vision, Goals & Values

ADVICE

- Use web-based collaborative tools
- Start with areas of agreement