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Minneapolis/St. Paul Chapter

June 30, 2005

Re: Lynn Ostrem

On June 29, 2005, the Executive Committee held a special meeting because there have been several incidents which have affected the morale and effectiveness of the Minneapolis/St.Paul Chapter of BetterInvesting.

This document reviews the issues and corrective actions.

It is noted that Lynn Ostrem performs in a thorough, precise, enthusiastic manner and has demonstrated that she is an excellent teacher. However, disruptive behaviors have resulted in deterioration of teamwork and morale in the Minneapolis/St.Paul Chapter.

A. Incidents of disruptive behavior

1. Demanded detailed information about new volunteer recruits. This request was outside of Lynn's area of responsibility.
2. Unrealistic expectations related to gathering names and email addresses.
3. Unprofessional interactions with other directors when discussing email opportunities.
4. Without basis in fact informed other directors that Matt Wilms required a stipend to speak at the Minneapolis/St.Paul Chapter's Investors Fair. This resulted in a lost opportunity to have an effective speaker at the 2005 Investors Fair. In a recent conversation, Matt Wilms stated that he did not require a stipend and was willing to participate in the 2005 Investors Fair.
5. As an Associate Director, you presented a motion after being informed not to present a motion because there was a motion currently open for discussion.

B. Resolution

1. In the Minneapolis/St.Paul Chapter, Lynn Ostrem is limited to the following areas of responsibility.
 - a. Chairperson, Road Trip Program.
 - 1) Assign qualified teacher on a rotating basis from a list of willing persons.
 - b. Teach classes as scheduled at the May Planning Meeting.
2. Interactions with Chapter Directors, Associate Directors and volunteers will be performed in a professional, non-confrontational manner.

This plan of action will be reviewed in three months, on October 1, 2005.

Lynn Ostrem, Associate Director
Minneapolis/St.Paul Chapter BetterInvesting

Date

Ilene Meade, President
Minneapolis/St.Paul Chapter BetterInvesting

Date