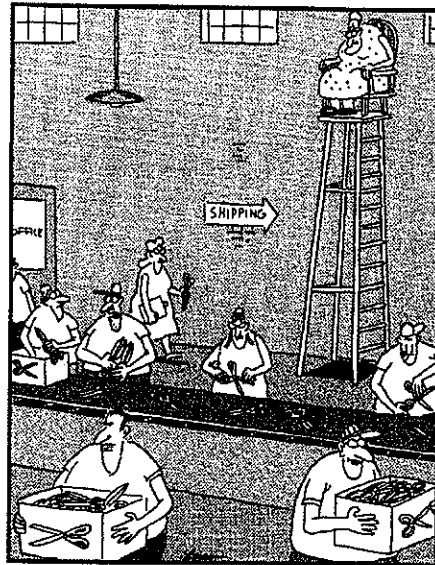


# Site Representative Training

## Site Representative's Role in Representation



"You must be new here! ... That's Miss Crutchfield, and she's here to make sure *nobody* runs with scissors."





## What is a B.U.M.?



- A. A Brooklyn Dodger.
  - B. A hobo.
  - C. The boy who's dating your daughter.
  - D. A devotee of the beach.
  - E. None of the above.
- **B**argaining
  - **U**nit
  - **M**ember:
    - Everyone covered by your Contract
    - Listed in Recognition article of the Contract
    - Includes Association members, non-members & agency fee payers

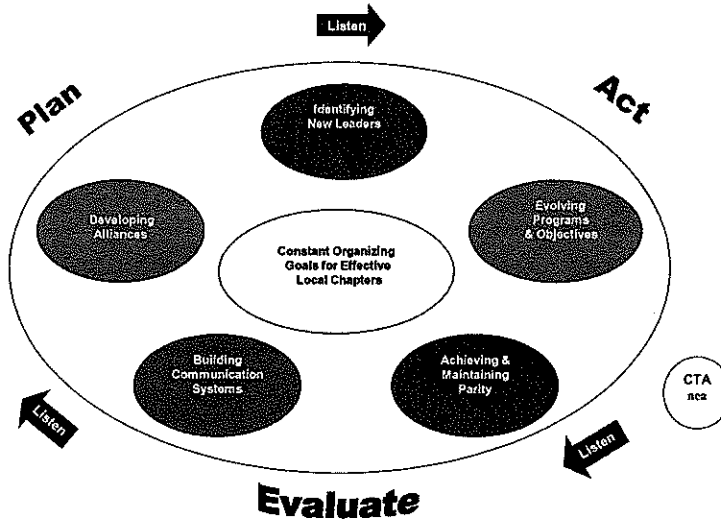


## Topics to be Covered:

- Organizing for Power
- Communications
- Advocacy
- Duty of Fair Representation
- Grievance Representation
- Weingarten Rights
- Representing Members at Meeting
- Member vs Member
- Union Code of Conduct
- An injury to one is an injury to all
- The Iron Rule



# Constant Organizing Goals



## The COGS

Use this chart to help develop and evaluate training programs to strengthen your local. The basis for effective local chapter programs is LISTEN > PLAN > ACT > EVALUATE. Five common characteristics of strong local chapters are referred to as the Constant Organizing Goals and can be used as a basis for effective planning and evaluation of programs and actions:

- **Identifying New Leaders**
  - New People/New Opportunities
  - Inclusive Involvement
  - New Roles
- **Communications**
  - Member to Leaders
  - Leaders to Members
  - "Say it" 7 Times, 3 Different Ways
  - Build Internal/External Alliances
  - Conversations Not Just Speeches & Flyers
- **Achieving & Maintaining Parity**
  - Power
  - Equality With Employer
  - Represent & Empower Members
  - Organize Then Mobilize
- **Evolving Programs & Objectives**
  - Representation
  - Involvement Based On Members Interests & Issues
  - Systematically Evaluate Existing Programs & Goals
  - Training Programs To Support Goals
- **Developing Alliances**
  - Internal & External
  - No Permanent Friends - No Permanent Enemies
  - Know Your Interests

### Steps To Develop Effective Local Chapters:

- Based on the Constant organizing goals, evaluate and assess current programs, utilizing your local staff.
- Set goals and develop program needs using CTA resources.
- Coordinate and schedule all elements of your program and training requests with your local staff.
- Evaluate and assess programs and actions using diagnostic tools, to establish local chapter priorities.



# Communication

## Must be Two Way!

- Leadership to Membership
- Membership to Leadership

Successful Chapters communicate with members consistently and in multiple modes.



# Communication

- Various types of meetings
- Email **Do Not Use District Email!**
- Chapter Website
- Flyers
- Newsletters
- Up to Date Bulletin Boards



## Various Types of Meetings

- Executive Board Meetings
- Rep Council Meetings
- General Membership Meetings
- 10 Minute Meetings
- Small Group Meetings
- Site Visits
- One-On-Ones



## 10 Minute Meetings

- Associations that hold regular site meetings have stronger Associations.
- Our members are pressed for time, so the meeting should begin and end on time.
- The meeting should normally address one important item.
- The meeting should be 10 minutes only and follow the meeting agenda.
- There should be a section at the end of the meeting agenda for members to write down their questions and suggestions.
- The Site Rep should then contact the member to discuss their questions and suggestions.
- The meeting should end with an upbeat tone.
- On the following page is a sample mailbox announcement of the 10-minute meeting and a sample agenda to distribute at the start of the meeting.



# 10 Minute Meetings

## Sample Announcement and Agenda



### 10 – Minute Site Meeting

(10 minutes. You don't believe it? Bring your stop watch.)

We're into heavy negotiations. The resulting agreement will be your contract. The Association is determined to keep you informed. Your Association leaders need your ideas, input and approval.

### Remember – only 10 minutes!

We begin at 3:45 sharp in the employee lounge.

We will conclude at 3:55 p.m. sharp.

Honest, it really is a 10-minute meeting on Thursday.

---

### Sample Agenda

XYZ Site Meeting

What was discussed at Rep Council (or Exec Board) at its last meeting. (2 minutes)

Your opinion is needed on proposed changes in Employee Benefits. Your views will be presented at the next Rep Council (or Exec Board) meeting. (4 minutes)

Update on latest development regarding inclement weather procedures. (3 minutes)

An Association achievement we can cheer about (1 minute)

Time's up! We told you we could do it in ten minutes! Don't forget to leave your questions and suggestions at the door (use the space below if you wish).

---

---

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_



# 10 Minute Meetings

## What a "10-Minute Meeting" looks like

### 0 – 3 MINUTES

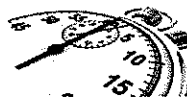
Report on significant Association activity.

### 3 – 9 MINUTES

Gather input on an important issue.

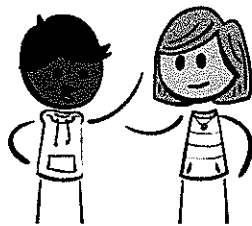
### 9 – 10 MINUTES

Share an Association success story.



## One-On-One Conversations...

Are more informal, deliberate meetings with individuals with whom you represent or could build a coalition.



## One-On-Ones

### Purposes for One-On-Ones

- Identify leaders
- Develop relationships
- Identify & validate concerns and issues
- Educate & inform members on issues
- Seek solutions
- Agitate
- Find existing networks of influence
- Get commitment

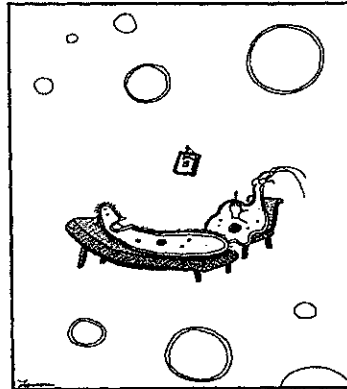




# Duty of Fair Representation

Must represent all unit members:

- Association Members
- Non-members
- Agency Fee Payers
- Religious Objectors
- Those you like
- Those you dislike
- No discrimination of any kind



"Well, I just feel like I'm living under a microscope."

**CTA**

# Duty of Fair Representation

## Agent of the Association

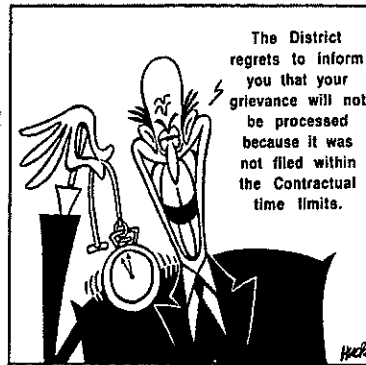
- Represent members at the Site level
- Represent members at the Association level
- Move to a neutral third party (Grievance Process)

**CTA**

# Duty of Fair Representation

## Know the Grievance Procedure!

- Know the grievance article within the Contract
- Know and follow Timelines
- Communicate with the Association Leadership



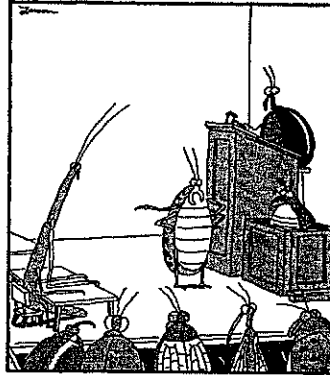
# Duty of Fair Representation

- If asked to provide representation and you cannot make the meeting:
  - Try to postpone the meeting until you can represent the Member.
  - Try to find someone else to represent the Member.
  - Call the Association President for assistance



## Representative as Advocate

- Communicate and listen actively to Bargaining Unit Members
- Advocate Member's views, not just yours
- Don't judge – Defend
- Problem Solvers at the lowest level
- Let the process show the "truth" and /or "value" of the complaint

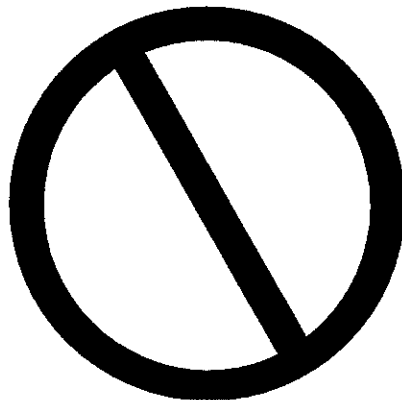


"Most interesting, ma'am—you've identified the defendant as the one you saw running from the scene. I take it, then, that you're unaware that my client is a walking sickle!"



## Agency Fee Payers & Non-Members

To be a member a membership form must be filled out and signed!



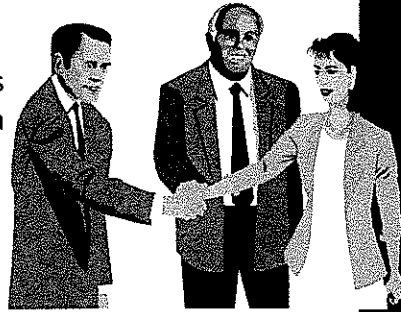
- No representation on legal matters
- Cannot vote in union elections or to Contract ratification
- Not members of local, CTA, nor NEA
- No local association or CTA/NEA automatic or discounted benefits



# The Right to Representation Weingarten Rights

## • Members Should Ask for a Representative if:

- They believe they are the focus of a **possible** disciplinary action
- They get a final unsatisfactory evaluation
- They have a complaint filed against them
- They have a grievance



**CTA**

# Weingarten Rights

If this discussion could in any way lead to my being disciplined or terminated, or affect my personal working conditions, I respectfully request that my Association Representative be present at the meeting. Without representation, I choose not to answer any questions.

*Need help? Contact your Local Chapter President*

**CTA**

## Member Issues

- **Accusations**
  - Principle
  - Student
  - Parents
- **Insubordination**
- **Evaluations**
- **Contract Violations**



## When Meeting with Site Admin.

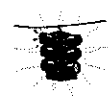
### ◦ DO:



- Be reasonable but firm
- Go in with a positive attitude
- Suggest solutions
- Know when to talk & when to listen
- Take good notes



### ◦ DON'T:



- Implicate the member
- Allow administration to quote rules/policy without providing you a copy
- Get angry
- Let members incriminate themselves



## Signing Documents

- DO:
  - Read it first
  - Get a copy
  - Keep a copy
  - Exercise the right to attach a response
  - Put current date by the signature
  - Contact CTA local if disciplinary in nature
  - Get a signed copy!
  - Sign in receipt only



**CTA**

## Post-Conference Cautions

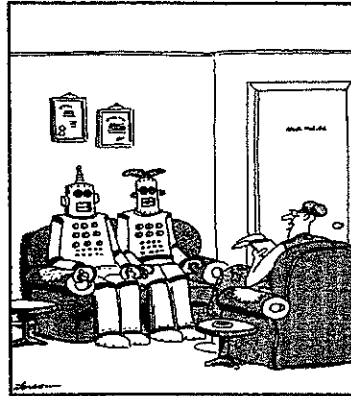
- Don't push situation to a higher level
- Don't let member do own investigation
- Don't instigate student or parent protests
- Don't make promises you cannot keep
- Keep it confidential
- Act professionally
- Update the Association



**CTA**

## Member vs. Member Cautions

- Not the Association's role to resolve unless it is a complaint against management
- Follow District formal complaint procedure
- There is no grievance if management cannot be made accountable for the resolution



"The problem, as I see it, is that you both are extremely adept at pushing each other's buttons."



## The Union Code of Conduct

- I will not criticize any union colleague except to the individual directly
- If any union colleague is being criticized in my presence, I will confront the criticism and ask that it stop
- I will settle my differences with union colleagues within the union
- I will not participate in any conversations with administration that criticize or negatively speculate about a union colleague
- I will engage in debate, offer others every opportunity for debate and respect minority viewpoints, but I will observe and support the majority mandate of my union





An Injury to One  
Is an Injury to All!



## The Iron Rule

Never do for others what they  
can do for themselves.

- Goal is not to make your members dependent on you
- Goal is to empower your members





## The Secret of Success

"Sir, what is the secret of your success?" a reporter asked a bank president.

**"Two words."**

"And, sir, what are they?"

**"Right decisions."**

"And how do you make right decisions?"

**"One word."**

"And, sir, what is it?"

**"Experience."**

"And how do you get experience?"

**"Two words."**

"And, sir, what are they?"

**"Wrong decisions."**



**CTA**

## Final Words of Wisdom

There is a big difference between a good sound reason for doing something and a reason that just sounds good.



**WELL, THIS ABOUT SUMS UP EVERYTHING I KNOW**

**CTA**

