

Higher Ed
Edition



Building Full Capacity Locals

Association/Building Representatives and Stewards

Starting with the Basics

MEA

Michigan Education Association

Dear Local Leader,

One of the indicators of a full capacity local is having a diverse team of knowledgeable, well-trained elected and appointed leaders. Building/association representatives and stewards (ARs) are important members of a local leadership team. They are the ones who most often deal directly with members to address their concerns and resolve their problems. They are the most important ambassadors that a local has since they are the face of the association for most members as well as their first line of defense.

Ensuring that ARs have the skills, training and resources they need is an important step toward increasing the capacity of your local. With that in mind, the following pages are filled with terrific ideas, information and activities designed specifically for ARs. They come from local leaders and staff across the state.

As with all BFCL publications, this booklet is designed to be adapted to fit the specific needs and limitations of your local. Use it as a training tool: distribute copies to your ARs at the beginning of the year; cover and expand upon the information at special AR training sessions; select portions to use at your local leadership meetings; highlight and support ARs who utilize the ideas in their buildings. The booklet is designed to be a starting point. Your UniServ director and MEA staff are available to provide additional training and information on any of the topics addressed in addition to others in which you may be interested.

These booklets, along with other materials, information and support designed to help you develop the capacity of your local are available by contacting Teri Battaglieri at tbattaglieri@mea.org or 800-292-1934 or by downloading from www.mea.org.

This booklet is a compendium of publications and materials resulting from the efforts and talents of many current and past MEA UniServ directors and local leaders—too numerous to name, but not too numerous to thank.

Updated July 2009

Association/Building Representatives (ARs) and Stewards Are the Face of the Union!!

In fact, the only direct contact many members may ever have with their association is through their ARs. The importance of ARs cannot be overstated. There is no replacement for well-trained, dedicated, enthusiastic ARs when it comes to providing service to members.

There are a lot of responsibilities that go along with the job of being an AR. First and foremost, an AR's job is to represent members and serve as a link between those members and their association. Other key responsibilities include:

- Holding meetings of the members to communicate information, seek input and direction on issues, and address member concerns and questions.
- Coordinating the prompt distribution to members of materials from the local, MEA and NEA as well as the timely collection of materials from members.
- Orienting new members to association activities and services.
- Interpreting and implementing the Master Agreement (contract) for members.
- Handling lower level grievances.
- Serving as the liaison between members and their supervisor.
- Representing members at all association meetings.
- Identifying and developing new association leaders.

ARs are critical to the development of a full capacity local!

Being an AR—What's It All About?

The following survey is designed to get you to think about your role as an AR in your local association. Use the results as a discussion starter to talk about the expectations, roles, responsibilities and needs of ARs in your local.

		Agree	Disagree
1.	As an AR, I have the potential to bring about change in my local association.	<input type="checkbox"/>	<input type="checkbox"/>
2.	As an AR, I sometimes worry that I am not well informed enough or skilled enough to do a competent job.	<input type="checkbox"/>	<input type="checkbox"/>
3.	I feel that my local doesn't place high importance on being an AR.	<input type="checkbox"/>	<input type="checkbox"/>
4.	ARs need to be well-respected and well-known by their colleagues.	<input type="checkbox"/>	<input type="checkbox"/>
5.	ARs should not be probationary employees.	<input type="checkbox"/>	<input type="checkbox"/>
6.	The term of office for an AR should be at least two years with no term limits.	<input type="checkbox"/>	<input type="checkbox"/>
7.	ARs should hold positions that do not include any supervisory or administrative duties affecting any of the members served.	<input type="checkbox"/>	<input type="checkbox"/>
8.	The AR needs to make personal contact with each new member.	<input type="checkbox"/>	<input type="checkbox"/>
9.	ARs need more training in order to do the jobs expected of them.	<input type="checkbox"/>	<input type="checkbox"/>
10.	The major role of an AR is that of a problem—solver.	<input type="checkbox"/>	<input type="checkbox"/>
11.	It is critical for an AR to be discreet and to treat all members' questions and concerns with strict confidentiality.	<input type="checkbox"/>	<input type="checkbox"/>
12.	ARs need to keep the local president updated on all major occurrences.	<input type="checkbox"/>	<input type="checkbox"/>
13.	ARs need to ensure that the master agreement is followed.	<input type="checkbox"/>	<input type="checkbox"/>
14.	It is reasonable to expect an AR to do the following:	<input type="checkbox"/>	<input type="checkbox"/>
a.	Develop a working relationship with each member he/she serves.	<input type="checkbox"/>	<input type="checkbox"/>
b.	Maintain a constructive working relationship with administrators.	<input type="checkbox"/>	<input type="checkbox"/>
c.	Distribute and/or collect materials and information to/from members as requested by the local or state association.	<input type="checkbox"/>	<input type="checkbox"/>
d.	Maintain an up-to-date fan-out system of members.	<input type="checkbox"/>	<input type="checkbox"/>
e.	Assist administrators in monitoring the job performance and ethical behavior of members.	<input type="checkbox"/>	<input type="checkbox"/>
f.	Attend all scheduled local association meetings in order to represent members.	<input type="checkbox"/>	<input type="checkbox"/>

		Agree	Disagree
g.	Upon a member's request, accompany and assist a member who has been summoned to an administrator's/supervisor's office.	<input type="checkbox"/>	<input type="checkbox"/>
h.	Help a member file a grievance.	<input type="checkbox"/>	<input type="checkbox"/>
i.	Promptly advise/assist a member who becomes involved in a situation that could cause legal action.	<input type="checkbox"/>	<input type="checkbox"/>
j.	Advocate and support MEA political decisions as well as local PAC drive and activities.	<input type="checkbox"/>	<input type="checkbox"/>
k.	Identify, encourage and recruit potential association leaders.	<input type="checkbox"/>	<input type="checkbox"/>
l.	Promptly and accurately advise a member on what to do if he/she becomes injured on the job.	<input type="checkbox"/>	<input type="checkbox"/>
m.	Provide competent advice to a member who is being asked to sign a letter of resignation.	<input type="checkbox"/>	<input type="checkbox"/>
n.	Suggest ways to resolve a problem when the grievance procedure is not applicable.	<input type="checkbox"/>	<input type="checkbox"/>
o.	Hold regular meetings to keep members informed about local and state association activities and decisions.	<input type="checkbox"/>	<input type="checkbox"/>
p.	Hold elections as indicated in local and state by-laws.	<input type="checkbox"/>	<input type="checkbox"/>
15.	It is reasonable to expect an AR to know the following:	<input type="checkbox"/>	<input type="checkbox"/>
a.	Basic policies that relate to day-to-day working conditions.	<input type="checkbox"/>	<input type="checkbox"/>
b.	Basic structure of MEA and NEA, as well as the function of the coordinating council, region council, etc.	<input type="checkbox"/>	<input type="checkbox"/>
c.	The general workings of the grievance procedure in the master agreement.	<input type="checkbox"/>	<input type="checkbox"/>
d.	The fundamentals of how collective bargaining works.	<input type="checkbox"/>	<input type="checkbox"/>
e.	How to plan and hold a brief and effective meeting of the members he/she serves.	<input type="checkbox"/>	<input type="checkbox"/>
f.	Where to get information on subjects such as retirement, certification, etc.	<input type="checkbox"/>	<input type="checkbox"/>
g.	The duty and legal obligations of representing members.	<input type="checkbox"/>	<input type="checkbox"/>
h.	Essential information about the local credit union.	<input type="checkbox"/>	<input type="checkbox"/>
i.	Where to refer a member for information about health insurance, annuities, etc.	<input type="checkbox"/>	<input type="checkbox"/>
j.	The basic contents of the master agreement.	<input type="checkbox"/>	<input type="checkbox"/>
k.	What services are available to help a member make retirement option decisions.	<input type="checkbox"/>	<input type="checkbox"/>
l.	How to get in touch with the local president, vice-president and UniServ director.	<input type="checkbox"/>	<input type="checkbox"/>

Do You Know...

1. ...who the current MEA president is? _____
2. ...who the current MEA vice president is? _____
3. ...who the current MEA secretary-treasurer is? _____
4. ...who the MEA executive director is? _____
5. ...how to get in touch with your local association president? _____
6. ...who your UniServ director is? _____
7. ...how to get in touch with your UniServ director? _____
8. ...in which MEA Region your association is located? _____
9. ...how many MEA Board members are in your region and what their names are?

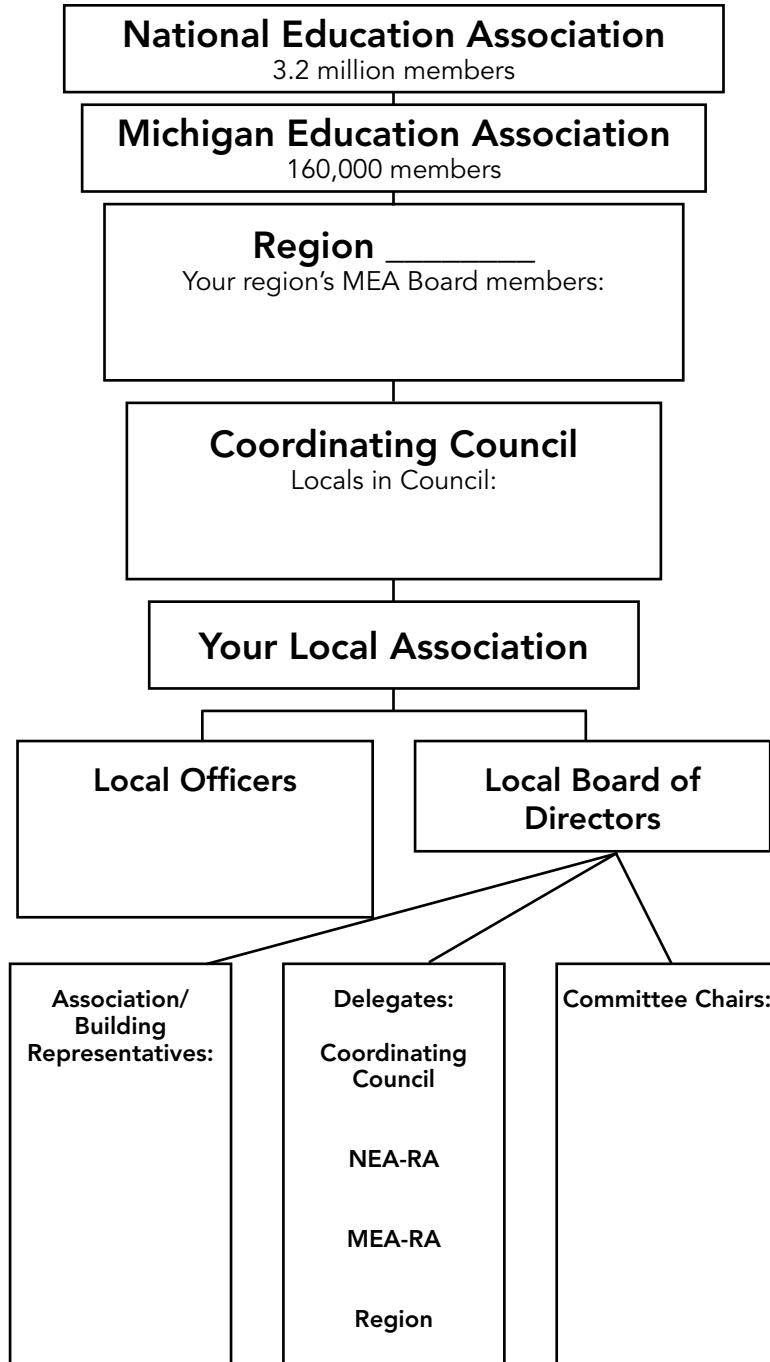
10. ...in which MEA Zone your local association is located?
11. ...who your Zone director is? _____
12. ...how much local association dues are for one of your full-time members?

13. ...how MEA dues are calculated for your full-time members?

14. ...what PAC stands for? _____
15. ...what the address is for the MEA Web site? _____
16. ...what the toll free MEA phone number is? _____

Education Association Structure

(fill in the blanks)



Speaking the Language...

Arbitration—the process to which unions and employers submit contract disputes that have not been resolved at earlier stages of the grievance procedure; a way in which both parties can achieve final and binding resolution of issues related to contract interpretation through the use of a neutral arbitrator.

Board of Reference—the five-person body in which is vested the judicial powers of the MEA. Each “judge” is appointed by the MEA President with concurrence by the MEA Board of Directors. The Board has the power to censure, suspend, or expel a member.

Coordinating Council—the body that governs a UniServ service unit. It is the liaison with the state and national associations regarding staffing and office operations.

Due process—meant to protect a person from a mistaken or unjustified deprivation of certain rights; based on the premise that an employer must comply with and honor basic standards of fairness when imposing a disciplinary action on an employee.

Duty of fair representation—the legal obligation that the association and its agents (includes ARs) have to represent the interests of all bargaining unit members in a fair and impartial manner. (See p. 11-12 for more information.)

EA—education association; the local association that represents teacher/faculty interests in a local school district or college/university.

ESP—education support personnel who are represented by MEA; includes paraprofessionals, assistants, technicians, secretaries, food service personnel, bus drivers, custodians, maintenance personnel, etc.

Insubordination—failure on the part of an employee to carry out an order or directive given by a supervisor. The best course of action when given a questionable directive (unless physical health or safety is an issue) is to follow it while at the same time pursuing available remedies such as a grievance.

Just cause—a basic set of standards against which the appropriateness of management-imposed disciplinary actions are measured.

MABO—Multiple Association Bargaining Organization; an organization resulting from a combination of bargaining units; formed to facilitate more effective local bargaining and contract maintenance.

Management rights—those rights that management has to direct, control and operate a school district/college; a clause related to this is contained in most contracts.

MERC—Michigan Employment Relations Commissions; a state of Michigan agency designed to provide mediation services and deal with other bargaining problems arising from PERA.

PAC—political action committee; the political arm of the association at the local, state, national levels; purpose is to further the cause of public education and public school employees through the electoral process.

Past practice—an accepted way of doing things; those practices that are not specifically identified or written into the contract but which, because of acceptance by both management and employees—over a period of time, have come to establish working conditions as binding as if they were written.

PERA—Public Employment Relations Act; a statute allowing public school employees the right to collectively bargain with their employers.

RA—representative assembly; the legislative body of the association which meets to set the policies of the organization, establish dues and budgets, elect officers, etc.; the MEA RA meets in the fall and spring; the NEA RA meets in the summer.

Unfair labor practice—practices as identified by PERA as illegal; includes such things as refusal to bargain in good faith by either party, employer interference with employees' rights to organize and maintain their union, etc.

UniServ director—the staff person assigned to your local to assist with contract negotiations, contract maintenance, retirement, unemployment, workers' compensation, representational issues and a host of other member issues.

Weingarten Rights—an employee's right to union representation when called before management when the employee believes the meeting may result in disciplinary action. (See p. 10 for more information.)

Zone director—coordinates programs and staff in each zone.

Weingarten Rights

Weingarten rights address the right of members to have union representation during an investigatory interview. An investigatory interview occurs when a supervisor questions a member to obtain information that could be used as a basis for discipline or asks a member to defend his/her conduct.

If a member has a reasonable belief that discipline or other adverse consequences may result from what he/she says, the member has a right to union representation by a person of his/her choice.

Under the Supreme Court's Weingarten decision, when an investigatory interview occurs the following rules apply:

Rule 1

The member must make a clear request for union representation before or during the interview. The member cannot be punished for this request.

Rule 2

After the member makes the request, the employer must choose from among three options:

- Grant the request and delay questioning until the union representative arrives and has a chance to consult privately with the member; or
- Deny the request and end the interview immediately; or
- Give the member a choice of having the interview without representation or ending the interview.

Rule 3

If the employer denies the request for union representation, and continues to ask questions, the employer commits an unfair labor practice and the member has the right to refuse to answer. The employer may not discipline for such a refusal.

As an AR, it is very important that you make all of your members aware of their Weingarten rights.

The **duty of fair representation** is the legal obligation placed on the association and its agents (that includes ARs) to represent the interests of all bargaining unit members in a fair and impartial manner regardless of affiliation with the association, while at the same time protecting collective interests.

There are legal rights and responsibilities that go along with your position as an AR.

Your Rights

- To serve and to act as the association's representative, without penalty or reprisal.
- To be recognized by the employer as the association's representative.
- To attend meetings between the employer and one or more bargaining unit employees in order to discuss issues of wages, hours of work and other terms and conditions of employment.
- To participate in such meetings by asking questions, clarifying issues, making statements and advising employees.
- To investigate incidents and problems associated with the rights and benefits addressed in the contract and statutes.
- To request and to receive relevant information from the employer.

Your Responsibilities

- Represent the interests of all employees in the unit, whether they are members of the association or not.
- Refrain from waiving, ignoring or attempting to change an employee's benefits and rights guaranteed by the contract.
- Settle similar grievances in a consistent manner as far as possible, recognizing the association's right to interpret ambiguous contract language as it deems appropriate.
- Not refuse to process a grievance for improper and illegal reasons, e.g., discrimination, social prejudices, personal hostility or association membership status.

- Consistently apply the same standards when deciding whether to process a grievance or submit it to arbitration.
- Exercise care and diligence when investigating whether a grievance should be filed, when processing a grievance and when presenting it to management.
- Protect the confidentiality of members involved.
- Properly and fully document all actions and related rationale associated with handling a member's case, in order to respond to future questions.

What about Criminal Activity?

The association's duty of fair representation does not require it to represent members in matters related to criminal activity. **When you encounter a situation involving the possibility of criminal activity, inform the member that you are not authorized to represent him/her in such situations and immediately contact your local UniServ director.** The member should be told that attorney/client privilege does not exist with association leaders/staff.

Defense or Representation?

An often heard phrase from critics both inside and outside of unions is that unions "defend incompetence and protect bad employees." This is simply not true and needs to be clearly understood. As outlined above, unions have a legal responsibility to **fairly represent** their members. The union's (and your) job is to **defend a member's contractual due process and just cause rights**, not specifically the person's actions. The association can never put itself in the role of a judge or a jury when it comes to decisions about a member's competence, ability, etc.

How Well Do You Know Your Contract?

The following activity is designed to help you familiarize yourself with some of the things contained in your contract. Keep in mind that most of the questions apply to all locals, but some may only apply to an EA, ESP or Higher Ed. unit. If a question isn't applicable to your local contract, simply indicate N/A in the blank.

First person/team to finish with the most correct answers wins!

1.	Where can you find information regarding agency shop? Page # ____, Art. # ____, Section ____
2.	How many levels are there in your local grievance procedure?
3.	Where can you find language regarding filling vacancies in your bargaining unit? Page # ____, Art. # ____, Section ____
4.	Where can you find language regarding voluntary transfers? Page # ____, Art. # ____, Section ____
5.	Where can you find information about sick days? Page # ____, Art. # ____, Section ____
6.	How many sick days does each member get per year?
7.	Does your contract contain language regarding personal business days? If yes, how are these days defined and how many does one get per year?
8.	Where can you find information about leaves of absence? Page # ____, Art. # ____, Section ____ List three kinds of leaves available.
9.	Does your contract contain information about classifications of employees? Y/N If yes, how many classification groups are there?
10.	Where can you find information about health care insurance? Page # ____, Art. # ____, Section ____ According to the contract, who is your health insurance carrier?
11.	According to your contract, how many days are you required to work this year?
12.	On which page can you find this year's salary schedule?

13.	Where can you find information about how many hours you are expected to work each day? Page # ____, Art. # ____, Section ____
14.	How is seniority defined in your contract?
15.	Where can you find information regarding layoffs/recall? Page # ____, Art. # ____, Section ____
16.	Where can you find information regarding the promotion/reappointment process? Page # ____, Art. # ____, Section ____ Is there a date by which all evaluations of employees must be completed for the year? Y/N
17.	List the names of the people who signed your contract on behalf of your local.
18.	On what date does your contract expire?
19.	Where can you find a list of association rights? Page # ____, Art. # ____, Section ____ Name two of the rights listed.
20.	List two rights that the board (employer) has according to your contract.
21.	On which page will you find information about employee personnel files? List three things that can be kept in this file.
22.	Are there any attendance incentives in your contract? Y/N Describe
23.	Where can you find information about the Family and Medical Leave Act (FMLA)? Page # ____, Art. # ____, Section ____

Once you get all of the correct answers, keep this with your contract, and refer to it as questions about the contract arise.

What Are They?

The grievance procedure is designed as a process to constructively resolve disputes and questions regarding contract interpretation. In the state of Michigan, the definition of a grievance is negotiated by the parties at the local level. However, in general terms a grievance is defined as: a claim by member(s) that there has been an alleged violation, misinterpretation or misapplication of a specific article or section of the contract. In short, a grievance is a problem-solving device. It allows for a constructive and orderly resolution to contract disputes.

Only bargaining unit employees or the association may file a grievance. Grievances cannot be filed by one member against another member. As an AR, you may be asked to mediate these interpersonal kinds of disputes (and certainly may do so informally), but they are not grievances unless they involve alleged violations of the contract by the administration.

Generally, there are two types of grievances:

- Employee—a grievance filed by a bargaining unit employee, challenging an action by management.
- Association—a grievance filed by the association on behalf of an employee, a group of employees or the association as an institution.

Gripe or Grievance?

All grievances are gripes, but not all gripes are grievances! Grievances address **specific violations of contract language or contract practice**. An important part of your job as an AR is to know the difference when members bring their issues and concerns to you. In addition, you need to keep in mind that filing a grievance should be **the last step, not the first, in attempting to resolve a problem**. Many situations can be resolved without filing grievances. The approach you take and the tone you use may determine how quickly a situation can be resolved or if resolution is possible without a grievance being filed.

You may encounter members who feel that grieving is “unprofessional.” Others may feel that grieving is unnecessary because they can take care of themselves. Still others may feel that grievances could strain relationships between employees and administrators. Keep in mind that your job as an AR is to make sure that the terms of the contract are upheld and that the terms and conditions of employment are applied equally to all in a fair and consistent manner. A grievance may be a necessary tool to employ in order ensure this.

How Does Your Local Association Handle Grievances?

Every local has a different way of processing grievances. In some cases, the local president and UniServ director handle all grievance processing while in others a grievance committee is in place to oversee the grievance process. In many locals, ARs handle grievances at the building level while in others they handle them until they reach the arbitration stage. It is important to know how grievances are handled in your local and who has the responsibility at each level.

To clarify the grievance process in your local, match the following individuals/groups with their responsibilities.

- A. Governance Body (Executive Committee, Board of Directors)
- B. UniServ Director
- C. Association/Building Rep.
- D. Grievance Committee
- E. Grievant (employee(s) with claim of contract violation)

- ____ 1. Makes decision to advance a grievance to arbitration.
- ____ 2. Initiates a grievance.
- ____ 3. Provides members with grievance training.
- ____ 4. Represents grievant at informal level.
- ____ 5. Determines whether a formal grievance should be filed.
- ____ 6. Informs member that the association will not support the grievant's claim.
- ____ 7. Settles a grievance short of arbitration.
- ____ 8. Collects facts related to a grievance.
- ____ 9. Maintains grievance files.
- ____ 10. Determines who represents the grievant.
- ____ 11. Assumes the cost for processing a grievance.
- ____ 12. Handles grievance at level 1.
- ____ 13. Handles grievance at level 2.
- ____ 14. Handles grievance above level 2.

*Regardless of who handles each of the above, it is important that your local president and UniServ director be kept fully informed at every level.

Be an Advocate, not a Judge!

As an association advocate, the AR has the duty to represent all members with absolute fairness and impartiality. **It is very important to recognize that your personal belief in the soundness of a member's grievance is irrelevant.**

The member is entitled to the benefit of every remedy and defense available, and it is your job to assert every such remedy and defense. Your job is not to decide what is just or right—that is the function of the arbitrator should a grievance get to that stage. Your job is to vigorously represent the member's cause and seek a remedy to which he/she is entitled. If you have reservations about a grievance or feel that you cannot be impartial, you need to contact your local president and/or UniServ director immediately.

A Member Appears with a Possible Grievance...

Regardless of your local's grievance process, as an AR you will probably have to deal with possible grievances at the building level. When a member comes to you with a problem, it may or may not result in a grievance, but the following steps are a good way to begin the process of resolution.

1.	Put the member at ease.
2.	Let the member tell his/her own story without interruption.
3.	Listen closely and take good notes. Be sure to get all of the facts!
4.	Interrupt only to refocus the discussion.
5.	Keep an open mind and do not personalize or jump to conclusions.
6.	To clarify various points, ask questions regarding who, what, when, where, how and why. Do not ask questions that will reveal some predisposed decision on how to handle the problem.
7.	Distinguish between facts, opinions, allegations and assumptions.
8.	Determine what the member has already done in relation to the problem (e.g., has he/she discussed it with anyone, has he/she put anything in writing?)
9.	Ask the member to state what corrective action/remedy he/she wants. Help keep expectations realistic!
10.	Re-state problem, background and remedy for member to ensure accurate understanding.
11.	Consider obtaining a written statement from the member. This may reduce the potential for inaccuracies and inconsistencies.
12.	Check the appropriate contract provisions, personnel and policy manuals, etc. Be sure to be aware of grievance filing deadlines and procedures.
13.	Determine best remedy. Communicate with local president and UniServ director as well as with member until problem is resolved.

For more in-depth information on grievance processing, request a copy of the BFCL booklet and companion CD, *Processing Gripes and Grievances: What Every Member Advocate Needs to Know (Higher Ed edition)*.

Effective communication is the key...

“Seek first to understand, and then to be understood.”
—Stephen Covey, author of *Seven Habits of Highly Effective People*.

Good ARs are great listeners!

We spend about 90 percent of our waking hours communicating in one form or another. It is estimated that we spend 7 percent of this time writing, 38 percent speaking and 55 percent listening. Despite all the “practice” we get listening, we only listen at about 25 percent of our listening capacity, which means we distort, forget, ignore or misunderstand 75 percent of what we hear! Good listening skills will dramatically affect your ability to effectively resolve member issues—both gripes and grievances.

There are 10 commandments for good listening:

1. Stop talking!
2. Put the speaker at ease.
3. Show that you want to listen.
4. Minimize distractions.
5. Put yourself in the speaker’s place.
6. Be patient.
7. Hold your temper.
8. Go easy on the criticism and argument.
9. Ask questions.
10. Listen “actively” (more on this later).

And there are eight wrong ways to listen:

1. Editing—you hear only what you want to hear.
2. Rehearsing—you think about what you want to say while the other person is speaking.
3. Deriving—you focus on finding a hidden message, rather than listening to what the other person is saying.
4. Daydreaming—you let your mind wander.
5. Personalizing—you relate everything the person is saying to your own life.
6. Switching—you change the subject quickly as soon as the person stops speaking.
7. Arguing—you focus on finding something to judge.
8. Agreeing—you nod your head to everything in order to avoid conflict.

Active listening means providing open, direct attention and encouragement to the speaker. It involves deliberately putting aside assumptions, prejudices, distractions and defensive or critical thoughts. An active listener makes direct eye contact with the speaker, speaks in a voice that is encouraging and supportive and uses body language and facial expressions that communicate interest, empathy and concern.

Follow the golden rule: Listen and respond to others the same way you would like them to listen and respond to you.

Responding to the Speaker

Nonverbally:

Good nonverbal communication includes making eye contact, leaning in toward the person speaking, nodding occasionally to show understanding or empathy, writing down important details (be careful not to concentrate so much on writing that you forget about the speaker) and appearing interested and relaxed.

Verbally:

If you want to be encouraging in order to convey interest or to keep the person talking, try using statements such as:

"Can you tell me more..."

"I'm glad to be here with you, and I want to hear what you have to say..."

"Why don't you start at the beginning..."

"I've got plenty of time, so take your time..."

"I see, please continue..."

If you want to clarify what has been said or get more information, try using statements such as:

"Can you explain this further..."

"When did this happen, where, how..."

If you want to show that you are listening and understanding and to check your interpretation of what has been said, try using statements such as:

"I thought I heard you say..."

"So, what you would like to see happen is..."

"I may need to check this out again..."

If you want to show that you understand how the other person feels, try using statements such as:

"You seem very upset..."

"Seems like you're under the weather today, want to talk..."

If you want to pull important ideas, facts and feelings together, try using statements such as:

- “These seem to be the key ideas you have expressed...”
- “So in a nutshell, you’re telling me that...”
- “If I understand correctly, these are the main issues...”

If you want to show empathy or acknowledge the worthiness of the other person, try using statements such as:

- “I appreciate your willingness to resolve this matter...”
- “I think I understand why you’d be confused...”
- “If I were in your position, I think I’d feel the same way...”
- “I certainly understand why you are angry...”

If you want to build upon or continue the discussion or to offer options, try using statements such as:

- “Have you considered...”
- “Do you think we should think about doing...”
- “Here’s what I’m thinking...”

If you want to clarify or address the speaker’s body language or other nonverbal signals, try using statements such as:

- “Are you crying because you’re hurt or angry...”
- “When you talk about your anger, you smile. This is confusing me...”
- “Your yelling makes me think you are angry with me...”

Sometimes people get defensive...

Oftentimes, when you discuss sensitive issues with members or ask questions about such issues, you may get some defensive reactions. The tone and wording that you use are very important. Members should always come away from a meeting feeling that you are on their side and that you understand their concerns. To reduce defensive reactions in others:

- Be aware of the difference between cold silence and warm silence.
 - cold silence—listening with no reaction—discourages speaking,
 - warm silence—listening while making eye contact and appearing intent and interested—encourages speaking.
- Always focus on the BEHAVIOR, not the personality.
- Use “I” statements, not “You” statements.
 - “I” statements are specific and make your desires clear.
 - “You” statements are accusing and put others down.

As an AR, you have an obligation to represent members at meetings with administrators (and others in supervisory roles) when requested to do so by a member. An administrator may also request an AR's presence at a conference with a member. The following tips will help you to be an effective member advocate in these situations.

Never Humble Yourself—You Are an Equal Party.

- As an AR you are a representative of the association just the same as the administrator is a representative of the board. Act as an advocate, not as an employee in such meetings.
- As an advocate, you have the right to ask questions, make statements on behalf of the association, and to perform protected activities without interference and without suffering reprisals.
- Command respect from the administration. Do not allow the administrator to treat you or the member less than respectfully. If demeaning behavior should occur, state your objections clearly, and if necessary suspend the meeting immediately.

Develop a Strategy for Every Meeting.

- If you are going with a member, make sure he/she knows the strategy in advance of the meeting.
- Decide who is going to speak, and to what extent. The member may be so emotionally caught up in the issue that he/she may react in a manner that is detrimental to his/her position.
- Differences between you and the member should never be expressed or discussed in front of the administration.
- Decide how either of you will signal the other that you want to call a caucus to discuss something during the meeting.
- Don't get side-tracked. Casual chit-chat may be used to get a meeting going, but shouldn't be allowed once you begin.
- If new facts are presented during the meeting, you may need to call a caucus with the member or stop the meeting and re-schedule.

Don't be Argumentative.

- If you disagree during a meeting with an administrator, do it amicably.
- Always remain calm, but firm.

Don't Make Deals Immediately.

- If a settlement is offered, think it over.
- Discuss any offer with the member and/or other appropriate leadership before agreeing to anything.
- Let the administrator know when he/she can expect an answer.

Keep Notes of the Meeting.

- List all who are present at the meeting along with date, time and location.
- Describe the issue discussed, the positions advocated by the various participants, conclusions reached, follow-up agreements and time schedule.

Every decision that impacts public school employees is made by an elected or appointed official, and as public school employees, we actually elect our own employers!

Because of this, it is very important that local leaders, including ARs, work to keep members involved and updated regarding the political process—from discussing pending legislation, to screening and recommending candidates, to working on school board elections, to collecting money to support friends of public education by holding yearly PAC drives.

As an AR, you are the key to a successful local PAC drive because of the work you do at the building/work site level. Members are far more likely to give to PAC when they feel informed about the issues, understand the political process and feel engaged in it, and understand how PAC money directly relates to their professional lives. Members are also far more likely to give to PAC if they are asked to do so face-to-face—by YOU!

Here are some things to keep in mind when your local has its yearly PAC drive:

- Giving to PAC should make people FEEL GOOD!
- No arm-twisting—collecting PAC dollars should be positive.
- Members need to be SOLD on the idea of PAC—how is it good for them professionally?
- 40% of the PAC money your local collects goes back to the coordinating council for use by the locals in local elections, bond issues, etc.
- Member-to-member contact is the key—it's the personal touch that counts.
- The #1 reason why members do not give to PAC is because they are not asked!

How Is my PAC Money Used?

This is the most commonly asked question during a PAC drive. Here's some information that will help you with an answer:

- Campaign finance laws do not allow for dues money to be used for PAC. The law also prevents the mingling of dues dollars with PAC dollars which is why PAC money must be contributed separately.
- MEA-PAC money is spent on recommended candidates. Recommendations come from local, regional and statewide member screening and recommending committees, and the MEA-PAC Council. In short, candidates are chosen by MEA members.
- PAC money is given to both Republican and Democratic candidates as well as to both the Republican and Democratic House and Senate caucuses.
- Candidates receive MEA recommendations and PAC dollars solely on their positions on issues pertaining to public education and public school employees.
- 40% of all MEA-PAC money is returned to the local coordinating council to support candidates/issues in local elections (e.g., school board, board of regents, city council, millages).
- MEA-PAC money may only be used to support statewide and local candidates. It cannot be used to support federal candidates. NEA PAC money is spent on federal candidates including the U.S. president and U.S. senators and representatives.
- Independent PACs (e.g., MEA-PAC) are limited in how much they can give to candidates. For statewide candidates in state races, MEA can give up to \$34,000. For state Senate candidates, the amount is \$10,000 per candidate and for state House candidates, \$5,000.
In the November 2008 election, MEA expended approximately \$1,500,000 by providing direct contributions to recommended candidates and state House caucuses and polling.
- PAC contributions to candidates pay big dividends. When our recommended candidates win, we all win. They open their doors to our lobbyists and seriously consider our positions on issues such as health care benefits, retirement benefits, right to bargain, job protection and professional quality issues. For example, MEA-supported candidate Representative Fred Miller introduced and sponsored HB 4533, which called for removing the prohibition against bargaining over outsourcing/privatization.

Building a strong public relations program in your building will go a long way to ensuring that members understand and appreciate the role of the local association in their professional lives. It will also lead to greater member involvement and support of the association. What follows is a list of ideas for you to consider. You know your building best—pick what works for you.

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| 1. | Association Buddies—ask a current member to be an association “buddy” for each new member. Suggested ‘buddy duties’ may include: touring the workplace, attending building association meetings together; pointing out best places in the area to eat, shop, etc.; describing the inside scoop on how the university/college really operates. |
| 2. | Post names, office numbers, phone numbers of ARs in a central location so members know how to find you. |
| 3. | Regularly change or add information to the staff bulletin board. Give a prize to the person who notices the new information. |
| 4. | Personalize association material and deliver it in person to members in your building. |
| 5. | Ask members to help you with association activities. |
| 6. | Slip a notice in members’ mailboxes the day before the first paycheck in which a raise will be included to remind them that their pay increases were due to association efforts during bargaining. |
| 7. | Put thank-you notes on association stationary in members’ mailboxes. It shows you appreciate their support and gives the association more exposure. |
| 8. | Make members feel pampered by holding a special breakfast for them prior to a vacation period. |
| 9. | Sponsor a public service project in which all members can get involved—adopt a family at the holidays, collect canned good for a food bank, etc. |
| 10. | Wish members “Happy Holidays” in some way. Try a plastic pumpkin filled with candy (No Tricks, Only Treats from Your Association!) on Halloween. |

11.	Distribute copies of the notes you take at the association meetings you attend. You can do this via e-mail as well. You may even want to send out regular, short updates on what's happening.
12.	Hold regular, short meetings to keep members updated on association activities. Try one in the morning with donuts or bagels (Bagels with the Bldg. Reps.!).
13.	If someone from your area is running for MEA office, invite him/her to meet your members at an informal after-work building reception.
14.	Pay tribute in a small way to a colleague who "makes me feel proud to say I work in the same profession." Recognize colleagues who attain advanced degrees during the year, get married, add to their families, etc.
15.	Do something special for a retiring member.
16.	Hold an after-work get-together for members at a local "watering hole."
17.	Encourage members to visit www.mea.org to find out about training and professional development opportunities as well as to keep up-to-date on association activities.
18.	Sign up the new members in your building for MEA's New Member Tips by going to www.mea.org and clicking on Member Resources. Then go to New Members.
19.	Personally introduce yourself to each new member.
20.	Create "tissue issues"—short messages about bargaining, political action or association activities that can be posted on the doors of bathroom stalls. This is also a great way to announce a meeting or thank members for their hard work.

When asked to give one piece of advice to new ARs, here's what "veteran" ARs around the state had to say:

- Always attend local meetings or send an alternate.
- Be available and be approachable. Members count on you to be around when there's trouble.
- Take time and listen. Be willing to try new ideas and accept new methods.
- Be encouraging.
- Keep up with what's going on.
- Listen more than you talk.
- Be open-minded.
- Know what to keep and what to throw away.
- Hold short, informative monthly union meetings.
- Be tactful. Recognize that questions, complaints, problems are very important to the people concerned.
- Keep a bulletin board with up-to-date association information on it.
- Be discreet—never gossip.
- Speak your piece, but let others speak theirs as well.
- Face-to-face contact with members is best.
- Inform members of their right to be represented if they're being reprimanded.
- Spend time with new members—lots of it!
- Always look for your replacement—encourage others to get involved.
- Once a decision is made by the local—get behind it.
- If you feel like you're in over your head call your local president and/or UniServ director.
- It's in the best interest of your members to build constructive, positive relationships with administrators/supervisors.
- Be a creative problem-solver—look for new ways of doing things.
- Don't panic.
- Know the contract, use it, and make sure that it's followed.
- When a member comes to you with a grievance **GET ALL OF THE FACTS!**
- Do not let your personal feelings interfere with your representation of members.

MEA

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