



CONTACT

United to Lead, to Promote, to Secure and to Defend

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National Staff Organization

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2009 Winter Advocacy Retreat was a time for firsts

Following a 20-year tradition, the 2009 NSO Winter Advocacy Retreat in Orange County, CA again featured provocative topics presented by skilled trainers, but it was also a Retreat featuring several firsts.

This year, more than a third of the 400 participants were first-time attendees—a record for this event. At the Newcomer's Orientation, Lynn Adler, NSO Vice President for Training from Illinois, encouraged newcomers to take advantage of all the Retreat had to offer.

"This is the best training you're going to get anywhere because our members are the trainers. And besides attending sessions, one of the most important things to do here is network with members from all across the country," Adler said.

For Eugene Dunk, newly-elected president of the Wisconsin USU, he sees NSO as invaluable in helping him accomplish his goals. "The biggest challenge I see as president is taking care of my members' economic needs at the same time the country is suffering so much. Through NSO and this training, I can get research to know what's happening in other states. With NSO support, we can stand strong together and I can advocate for our members to be taken care of."

In his opening remarks, NSO President Chuck Agerstrand from Michigan marked another first with the introduction of the Probation Association of New Jersey. This group was attending the Retreat as NSO guests.

Agerstrand also recognized the 13 representatives of the Communication Workers of America (CWA) from New York who are considering joining NSO. Along with their president, Michael Ostrander, the delegation attended sessions and had the chance to see how NSO works.



President Chuck Agerstrand answers a membership question from Mike Ostrander and his members from Communication Workers of America (CWA) who are considering joining NSO.

"We're so glad to be here," said Ostrander. "NSO has so much to offer its members and this Retreat is a perfect example. That's why we're considering becoming a part of this impressive organization."

Ostrander explained that currently there are three separate CWA units, each with a separate contract. Bargaining is staggered with separate contract expiration dates. The smallest unit has been the first to bargain. Ostrander said that the three units want to be one affiliate and is curious how NSO can help with that effort.



President Agerstrand introduces the Oregon PSO bargaining team as part of opening remarks at the Retreat. A two-week strike helped them get a new contract.

The last "first" was one all NSO members could enjoy—the inauguration of a new president and, hopefully, a new administration focused on improving labor relations.

[Hillary Stephens from Idaho has only been on the job for two months and the Winter Advocacy Retreat is her first NSO event. Hear what the training means to her.](#)



Keynote speaker, Mel Myler, continued his presentation on change in the session, “Lunch with Mel” where he was able to personally answer questions.

Shift Happens!

Myler recruits “agents of change”

At last year’s NSO RA, Mel Myler, retired NEA director, challenged delegates to decide whether they would face change as a seed or a stone. He brought a similar message to the Winter Advocacy Retreat. He warned new and veteran affiliate presidents that if we become too comfortable with our current models, we’ll never be able to build a new culture. And with the rising number of charter schools, dropouts and social media opportunities, Myler warns that “shift happens” and we better be ready to embrace it.

“Lunch with Mel”

As a session, Retreat participants could ask specific question of Myler. There he emphasized staff’s role in the change process.

When asked about being a leader during these hard economic times, Myler said, “We should look at it as an opportunity for change. We should have a seat at the table to start transforming the organization. We can’t accept others making decisions for us.”

[To read Myler’s full presentation, click here.](#)

They went off to see the Wizard

“Whether you’re the Tin Man or Dorothy all depends on whether you look better in gingham or tin.”

Tin Man? Dorothy? Wizard of Oz? What’s that got to do with being an affiliate president?

Plenty!

If you had the chance to be a part of the session “Practical Tips for Presidents,” you discovered that the Wizard of Oz characters were leaders--each in his/her own way. The children’s classic was the basis for the session presented by Allison Herndon of Virginia and Tyrone Melton of North Carolina.

“Using the Wizard of Oz characters adds an interesting dimension to the discussion of leadership. It starts people thinking and the result is a pretty comprehensive list of suggestions for new and veteran presidents,” said Melton.

Participants chose to be the Lion, the Scarecrow, the Tin Man or Dorothy, and in small groups, came up with a list of practical tips to share with other session attendees. Here’s their advice for presidents who find they’re not in Kansas anymore.

Tips for Presidents

1. Share leadership responsibility with the other officers.
2. Maintain good two-way communication with members.
3. Prioritize the jobs to be done.
4. Check the facts and your emotions before you deal with an issue.
5. Define who you are as an organization before others do it for you.
6. Involve people with perspectives different from yours.
7. Have a good filing system.
8. Use the 24-hour rule—Wait before you hit “send.”
9. Establish and publish a union Code of Conduct.
10. Use one-on-one meetings to find out how members are feeling.



Leslie Fritz from NSO New Mexico goes over her list of practical tips for presidents.

It's been a busy year

Agerstrand reviews challenges, successes

The NSO Executive Committee meeting prior to the Retreat and his opening remarks to Retreat participants served as President Chuck Agerstrand's "state of the union" address.

"There were lots of challenges for us and our affiliates. It's NSO's strength and unity in response to those challenges that will guide us in the new year," Agerstrand said.



President Agerstrand introduces the Oregon PSO bargaining team as part of opening remarks at the Retreat. A two-week strike helped them get a new contract.

An example of that strength was the successful Oregon professional staff strike. Not only did they emerge with a fair contract, they also established a coalition with their associate staff colleagues.

Catherine Alexander, Oregon PSO president, expressed her thanks to NSO for its help. "You wonder whether the fight is worth it. Then you look around and see not just your members' support but you see that NSO is there for you

too. And it doesn't get any better when your associate staff brothers and sisters join you on the picket line in support."

That kind of coordination was also evident when NSO joined forces with NEA to lobby for changes in the Pension Protection Act. Agerstrand and NEA Executive Director John Wilson had both groups coordinating efforts to lobby for those changes.

Agerstrand said, "While we were successful, we're not out of the woods yet. We have to be vigilant or else there will be serious financial repercussions for those affiliates with defined benefit plans."

Also at risk is the Memorandum of Understanding which committed NEA to fully funding its pension plan. Coupled with the current economic crisis, NEA and its affiliates are facing dramatic increases in contributions to the Plan. With another increase set for May 1, NEA and its affiliates will have to budget the monies necessary to ensure that these obligations are properly funded.

[Mort Rhineheart, NSO Pension Consultant, offers advice when it comes to pension bargaining. Click here for his strategy.](#)

The historic inauguration of a new president is also a ray of hope for NSO. The Dept. of Labor has made the job of treasurers very difficult. Federal rules and regulations involving the completion of IRS 990 and 1099 forms and LM reports are becoming more problematic. Agerstrand expressed the hope that a new administration will ease some of the frustration.

There's more good news on the horizon. Preparations are underway for NSO's 40th anniversary in 2010. Planning for a celebration at the NSO RA in San Antonio is already starting.

The number of first-time attendees and new affiliate presidents is leading NSO to consider adding more advocacy training. As a result, the Leadership Academy may become a part of the 2010 Winter Advocacy Retreat.

In reflecting on 2008 and looking forward to 2009, Agerstrand commented, "The activism of NSO members and the willingness to fight for what is right are keys to successfully dealing with any issues. And we can count on our members to keep this national union as a powerful force for advocacy for our union members."

NSO Executive Committee Highlights – Jan. 20-21, 2009

- Vice President for Defense Marius Ambrose from Maryland reported on grievance and arbitration activity in the states. Affiliates in 17 states requested assistance on issues of termination, EEOC complaints, duty of fair representation, and changes to a 401K plan.
- Vice President for Program Lynn Adler from Illinois provided NSO assistance to 20 states. Through Adler, local affiliated received training, bargaining or facilitation help. Click **here** to learn the procedure for requesting such assistance.
- Treasurer Ron Goldenstein continues to offer advice to local affiliate treasurers in dealing with federal regulations which are becoming more burdensome. The RA will be considering a new five-year budget. [Hear Ron Goldenstein's advice to local affiliate treasurers.](#)
- Secretary Mary Henson provided each Retreat participant with a CD of the 2009 NSO Handbook. Candidate petitions for NSO open positions will be available on the Web site and must be returned to Henson by June 12. Director positions in Regions 1, 3, 5, and 7 are open, along with two At Large Director positions. Go to www.nationalstaff.org and click on Campaigns and Elections for copies of the Election Notice, Campaign and Election Rules and Candidates Petition.
- Access membership cards were available at the Retreat. See your affiliate president if you haven't received yours.
- Goals and settlement standards reviewed through Coordinated Bargaining Councils (CBC) will soon be available.
- NSO officers will be meeting with the Uniserv Managers Association (UMA) in Feb. to review NEA Uniserv Guidelines. The concern still remains that governance wants to limit the role of staff. After the review, the guidelines will be implemented.
- The Virginia ASO has been certified by the NLRB.
- Strike authorizations have been approved for Wisconsin Professional and Associate staff.
- In Michigan, new 403(b) regulations caused the creation of a new product that cut commissions to Financial Service reps by 75 percent. With the reps preparing to bargain a new contract, this move will be an issue.
- The North Carolina Staff Organization rejected a TA that included Merit Pay.
- Indiana Professional Staff completed bargaining on a severance package. This \$1 million-management obligation will impact the organization and NSO members.
- The Association of Pennsylvania State College and University Faculty (APSCUF-SO) is one of NSO's newest affiliate.

Members of the Pension Benefits Committee are available to help affiliates with pension plan concerns. Requests for assistance should be made to your Regional Director. Go to www.nationalstaff.org, NSO Executive Committee, for a listing of Directors.

National Staff Organization

The world's largest union of union staff—that's what the National Staff Organization has become. Through the efforts of literally hundreds of staff leaders, NSO has grown from a mere 35 members in a handful of states in 1969, to 5,013 (as of August, 2008) from 89 affiliates in 50 states and the District of Columbia. A major portion of that growth came with the decision by the 1978 NSO Representative Assembly to organize associate staff members.

Today, NSO has over 2,300 full-time and over 106 part-time associate staff members.

NSO Executive Committee

President – Chuck Agerstrand

Vice President for Defense – Marius Ambrose

Vice President for Program – Lynn Adler

Treasurer – Ron Goldenstein

Secretary – Mary Henson

Region 1 – Cheryl Singleton

Region 2 – Butch Santicola

Region 3 – Emmitt Jimmar

Region 4 – John Stephens

Region 5 – Kathy Hill

Region 6 – Michael Coleman

Region 7 – Rosemary Wolf

At Large-A – Robert Blackwell

At Large-B – Ruth Ivory

Communications – Rosemary Carey

Web – Miriam Garcia

Check out the newly-designed Web site,
www.nationalstaff.org for the latest news.
