



Winter Advocacy Retreat

January 12-14, 2017

Hyatt Regency, Orange County, Garden Grove

SESSION # 100	SESSION DESCRIPTOR
<p>101 – 401</p> <p><i>All day 2-day session</i></p> <p><i>New Session</i></p>	<p><u>Organizing for Power (O4P) (2-day session)</u></p> <p>PRESENTERS: <i>Mike Horner, NSO Retired; Janet Beck, Washington</i></p> <p>Organizing for Power will empower locals to effectively organize (internally/externally) around the threats/challenges facing our NSO affiliates. More than 1,400 past members/leaders use these concepts in their UNION work. All NSO affiliates (especially our new leadership/bargaining teams) need the deeper understanding of organizing that Organizing for Power provides. Build powerful/organized/united locals with O4P.</p>
<p>102-402</p> <p><i>All day 2-day session</i></p> <p><i>New Session</i></p>	<p><u>Practical Tools in Organizing for Power Part 1 (2-day session)</u></p> <p>PRESENTERS: <i>Robert Lindquist, NSO Retired; Kim Mina, California</i></p> <p>This session is essential for NSO Leaders and organizing teams to prepare for opportunities and counter threats with powerful organizing campaigns. Building on Organizing for Power’s foundation, this session explores proven practical skills, tools, and actions for sustainable organizing. It focuses on: (1) Power analyses; (2) Building relationships with members and allies; and (3) Strategic planning of campaigns.</p>
<p>103 – 403</p> <p><i>All day 2- day session must attend part 1</i></p> <p><i>New Session</i></p>	<p><u>Practical Tools in Organizing for Power Part 2 (2-day session)</u></p> <p>PRESENTERS: <i>Steve Pulkkinin, CSO-NSO Retired; Cindy Ensworth, CSO-NSO Retired</i></p> <p>This session is essential for NSO leaders and organizing teams to prepare for opportunities and counter threats with powerful organizing campaigns. Building on Organizing for Power’s foundation, this advanced session explores proven, practical skills, tools, and actions for sustainable organizing. It focuses on: (1) Strategy; (2) Tactics; and (3) After Action, review and evaluation.</p>

<p>104 – 404</p> <p>All day 2-day sessions</p>	<p><u>Understanding Workplace Bullying (2-day session)</u></p> <p>PRESENTERS: <i>Rose Tapp, California; George Luse, MA-NSO Retired</i></p> <p>There are bullies in every aspect of our lives and they can play a major role in creating a toxic workplace environment. Unfortunately, workplace bullies are a problem faced by many of our members in all job categories. In this session, participants will identify characteristics of bullying behaviors, the role of the bystander, and strategies necessary to be productive and keep your sanity. It is not your job to change the bully, but to protect yourself.</p>
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SESSION #	SESSION DESCRIPTOR
<p>105-605</p> <p><i>New Session</i></p> <p>Must attend all sessions</p>	<p><u>Intensive Arbitration (Thursday-Saturday Session)</u></p> <p>PRESENTERS: <i>Don Tarr, NSO Retired, Lois Tarr, NJEA</i></p> <p>Join us as you are taught the essential skill sets of the arbitration process, from beginning to end. Then you will be given time to prepare for the culminating activity – an arbitration hearing with a member’s termination hanging in the balance.</p>

SESSION #	SESSION DESCRIPTOR
<p>106</p>	<p><u>Are YOU Facing Retirement Armageddon?</u></p> <p>PRESENTER: <i>Mort Reinhart – NSO Retired</i></p> <p>Think your retirement is safe? Think again! Changes to your benefits are being contemplated as you read this sentence. Formula changes and freezes of defined benefit plans, smaller contributions to defined contributions plans, and the introduction of hybrid plans are just a few of the ideas being seriously considered by your employers as a way to reduce retirement costs. How do you face these issues? Of what value are the two major pieces of federal legislation passed in recent years to provide retirement security? How much security does the Pension Benefit Guarantee Corporation (PBGC) offer? Will there be Social Security when it is my turn? This session is a must for participants who are currently or will someday be involved in retirement benefit organizations.</p>

<p>107-207</p>	<p><u>Treasurer's Workshop</u></p> <p>PRESENTERS: <i>Ron Goldenstein, NSO Treasurer; Michelle Strzynski, NSO Auditor; Eric Urban, Ohio PSU</i></p> <p>This session is designed for treasurers and other union officers who want to know the financial side of unions. All legal requirements that treasurers must meet will be discussed in detail. We will cover Department of Labor (DOL) reporting requirements, IRS and DOL legal documentation relating to vouchers, the accounting cycle, treasurer's reports, the preparation of budgets and "do's and don'ts" of a union treasurer. This is a newly-formatted training session that all treasurers should attend.</p>
<p>108</p>	<p><u>The Seven Tests to Just Cause – Can your Employer Pass them?</u></p> <p>PRESENTER: <i>Charlie Shaffer, PSEA</i></p> <p>The seven steps arbitrators use to determine whether an employer had just cause for administering discipline will be explored through an interactive analysis of actual cases that highlight each of the tests. The Principles of Progressive Discipline will also be examined. Learning this foundation of employee rights is a MUST for all union advocates.</p>
<p>109</p> <p><i>New Session</i></p>	<p><u>Brand your Association with Facebook</u></p> <p>PRESENTERS: <i>Rosemary Carey, NSO Retired; Donette Ramey, NSO Retired</i></p> <p>If your association doesn't have a presence on Facebook yet, you're missing a great opportunity to engage your members. With Facebook, you can keep members informed, involved and encouraged to share ideas and opinions. We'll help you give your association and members a Facebook profile. Come prepared with an electronic copy of your association's logo and a picture showing your association in action – especially one with members. Bring your phone, tablet or computer to create your page.</p>
<p>110</p>	<p><i>NSO Executive Committee</i></p> <p>Just For Presidents</p>
	<p><u>Going on the offense: Strategies to Engage Your Members Around</u></p>

<p>111</p> <p><i>New Session</i></p>	<p><u>Political Minefields</u></p> <p>PRESENTERS: <i>Todd Jaeck, Ohio PSU; Herman Pipe, Ohio PSU</i></p> <p>This session is designed specifically for experienced advocates. It will address the increased need to organize staff union members so they can expand their influence for effective action in an environment of ongoing internal and external political attacks. If your staff union connects with values, interests and needs of its membership, then it will build the power necessary to withstand any political landscape and effectively bargain stronger contracts.</p>
<p>206</p>	<p><u>Keeping Focused</u></p> <p>PRESENTER: <i>John Riley, NSO Retired</i></p> <p>This session will help you ensure that your union meeting achieves its goals by making it orderly, efficient, and inclusive through the use of Parliamentary Procedures.</p>
<p>208</p> <p><i>New Session</i></p>	<p><u>The Politics of Crisis Communications: Using Social and Traditional Media in a Crisis</u></p> <p>PRESENTERS: <i>Nate Williams, Ohio PSU; Dinica Williams, Ohio PSU</i></p> <p>A crisis is a political environment. What can political campaign tactics and strategies teach when it comes to utilizing social media and traditional media? A teacher strike in Ohio in 2014 will serve as a case study in adapting political campaign communication practices to a collective bargaining crisis.</p>
<p>209</p> <p><i>New Session</i></p>	<p><u>Generational Diversity – Engaging ALL Your Members</u></p> <p>PRESENTER: <i>Kelley Clouser, PSEA, SO</i></p> <p>Did you know that there are now four generations in the workplace? This session is geared toward understanding generational diversity and using that knowledge to more effectively engage ALL our members.</p>
<p>210-310</p>	<p><u>Know Before You Write</u></p>

<p>New Session</p>	<p>PRESENTERS: <i>Jackie Rhodes, NSO Retired</i></p> <p><i>Bob Thomas, NSO Retired</i></p> <p>This session is geared to new advocates who will be involved in writing contract proposals for bargaining. Where do you start? How do you prepare and research issues? What do you include in a proposal? Have fun learning the do's and don'ts of writing contract language.</p>
<p>211</p>	<p><u>Hammer, Screwdriver, or Wrench? - Selecting the Best Approach to Address Employer-Created Problems.</u></p> <p>PRESENTERS: <i>Mike McNett, Washington, EASO; Shelby Hopkins, Washington EASO</i></p> <p>Staff union leaders regularly face issues created by the employer that affect the rights, working conditions, and well-being of our colleagues. Not every problem is the same, nor is there a single approach by which every issue can be addressed. In this session, an experienced labor attorney and an advocacy specialist will walk you through how to assess various types of problems and determine the best response, whether it be a grievance, a demand to bargain, an unfair labor practice, a complaint or other methods to reach a solution that maintains the rights of the members you represent.</p>
<p>306</p> <p>New Session</p>	<p><u>Affordable Care Act: What You Need to Know</u></p> <p>PRESENTERS: <i>Daniel Gottheimer, Maryland; Alfredo Campos, NEASO</i></p> <p>In this session, you will receive an explanation of the Affordable Care Act, updates, sample contract language for staff contracts that you should have, and a review of potential legislative changes. Topics will include (but not limited to): the excise tax, patient protections, rights accorded employees in the workplace, employer responsibility and tax changes.</p>
<p>307</p>	<p><u>You CAN Manage Conflict</u></p> <p>PRESENTER: <i>Jane Travis-Address, New Jersey</i></p> <p>Life presents us with all kinds of conflict, both in our professional and personal lives. Learn to manage it in this highly-participatory session. Discover your conflict profile and explore the different styles of managing conflict. Empower yourself with choices and enhance your ability to manage conflict in your life.</p>

<p>308-508</p> <p><i>New Session</i></p>	<p><u>NSO SPARKS</u></p> <p>PRESENTERS: <i>Tara Quackenbush, Washington EASO; Matt Kruse, Arizona, EASO</i></p> <p>This session is designed for NSO members new to staff work. Content will include an overview of NSO, topics of interests to new staff determined by a participant survey, and the opportunity to mingle and expand professional networks. Participants will leave with the framework to facilitate a SPARKS experience for members back home.</p>
<p>309</p> <p><i>New Session</i></p>	<p><u>Are You Getting the Most Out of your e-mail System?</u></p> <p>PRESENTERS: <i>Rosemary Carey, NSO Retired; Donette Ramey, NSO Retired</i></p> <p>An email messaging system is a useful communications tool, but it can do more for you than just sending messages. We'll show you how to set it up to obtain home email addresses, track your membership, and customize messages to specific audiences. You'll be able to turn your email system into a membership system that will meet your affiliate's and member's needs.</p>
<p>311-411</p>	<p><u>QuickBooks -- Open Forum</u></p> <p>PRESENTERS: <i>Ron Goldenstein, Nebraska; Michelle Strzynski, Michigan; Eric Urban, Ohio</i></p> <p>This session will provide the basic usage of QuickBooks for maintaining accurate and up-to-date financial reporting. It will include using the programs for budgeting, maintaining accurate accounting records through the use of chart of accounts, classification of funds required by law and classification of expenses. Please bring your laptop and have the program loaded to achieve the highest learning experience from this class. The online version of QuickBooks is very cumbersome and not recommended. It is not a requirement to have a laptop or the program with you.</p>
	<p><u>Defined Retirement Plan</u></p>

<p>406</p>	<p>PRESENTER: <i>Daniel R. Saling, NSO Retired</i></p> <p>Do you know your retirement system? This interactive session is designed to provide you with a basic understanding of how your retirement system works and what your benefits will be when you are ready to retire. The program discusses retirement formulas, early retirement, COLA, vesting, purchase of prior credit, Section 415 limitations, switching to a defined contribution plan, termination, how to prepare for retirement, and many other topics as time permits.</p>
<p>407</p>	<p><u>Insurance Under Attack: Bargaining Health Insurance</u></p> <p>PRESENTERS: <i>Doug Terwilliger, NEASO; Sheila Jackson, Ohio ASU</i></p> <p>Our bargained insurance benefits are under attack. Employers are looking to employees to save on benefit plans through higher cost sharing and benefit reductions. This session will evaluate different aspects of employer-provided life and health insurance, plus evaluate the health insurance benefits provided by the Veteran’s Administration.</p>
<p>409</p> <p><i>New Session</i></p>	<p><u>Know your Contract: The Nuts and Bolts</u></p> <p>PRESENTER: <i>Kelly H. Compeau, Pennsylvania</i></p> <p>From Agency Shop to Zipper Clause, your contract contains many seemingly standard articles that make it solid. In this session, we will analyze various contract clauses, identifying their strengths and weaknesses. It is suggested that you bring a copy of your contract.</p>
<p>410</p>	<p><u>Law of the NLRA Strikes/Lockouts-replacements/benefits</u></p>

	<p>PRESENTERS: <i>Robert E. Day, Jack Shamel, NSO Retired, Marius Ambrose, NSO Retired</i></p> <p>This class will explain the NLRB law of strikes and lockouts. Included with be economic vs unfair labor practice strikes and consequences. Discussion will focus on replacements, crossovers, law of internal union discipline for strikebreakers. Included will be explanation of what is permanent vs temporary and recall/reinstatement rights as well as how to end a strike.</p>
<p>411</p>	<p><u>QuickBooks, Open Forum</u></p> <p>PRESENTERS: <i>Ron Goldenstein, Nebraska</i></p> <p><i>Michelle Strzynski, Michigan</i></p> <p><i>Eric Urban, Ohio</i></p> <p>This session will provide the basic usage of QuickBooks for maintaining accurate and up-to-date financial reporting. It will include using the programs for budgeting, maintaining accurate accounting records through the use of chart of accounts, classification of funds required by law and classification of expenses. Please bring your laptop and have the program loaded to achieve the highest learning experience from this class. The online version of QuickBooks is very cumbersome and not recommended. It is not a requirement to have a laptop or the program with you.</p>
<p>501</p> <p><i>New Session</i></p>	<p><u>7 Steps to Winning the Retirement Game</u></p> <p>PRESENTER: <i>Doug Terwilliger, NEASO</i></p> <p>Retirement. It's creeping up on us. Are you prepared? Do you understand the investments available to you? Do you have the right mix of investments? Do you need help from a financial expert? This workshop will evaluate all facets of investments and retirement planning, plus a review of estate planning.</p>

<p>502</p> <p><i>New Session</i></p>	<p><u>Bargaining: I Know Nothing About it!</u></p> <p>PRESENTERS: <i>Mary Henson, NSO Retired</i></p> <p> <i>Jackie Rhodes, NSO Retired</i></p> <p>This session is geared towards individuals who have little to no experience with the bargaining process. The participants will receive an overview of the methods and processes in bargaining—as well as the how and why—including the importance of engaging your members.</p>
<p>503</p>	<p><u>Show Them the Money: Budget Analysis for the Modern Union</u></p> <p>PRESENTER: <i>Andrea Hardy, Washington EASO</i></p> <p>Does your association cry poor every time the staff union comes to the table to bargain? Are you after better compensation or staffing levels, but they insist they have none, only to turn around a month after the contract has been ratified to spend thousands of dollars on consultants in areas where your members could be doing the work? Are they attacking the sustainability of your pension, even though its well-funded and two years ago they decided not to contribute? Want to fight back? In this session, we'll talk about what you can do to combat arguments about poverty and support the needs of your fellow staff members by demystifying the data.</p>
<p>504</p>	<p><u>The Union in a New Age: Bringing Sexy Back</u></p> <p>PRESENTER: <i>Tim Cross, Colorado EASO</i></p> <p>The changing face of our union requires new ways of thinking. Our approach to our new and more modern members must have curb appeal. This session proposes careful understanding of our members and how we engage them on various levels, including the new electronic landscape. You'll learn that short and brief blurbs are what attract the attention of the new generation.</p>

<p>506</p> <p><i>New Session</i></p>	<p><u>Unionism: Where Does the Associate Staff Member Fit In?</u></p> <p>PRESENTERS: <i>Valerie Shuman, Pennsylvania SEA-SO</i></p> <p><i>Debra Brace, Pennsylvania SEA-SO</i></p> <p>As an associate staff member, have you ever felt like your voice isn't heard. You're not really sure what your role is in the union? This session is for you! This session is designed for associate staff members who want to learn more about unionism and the role they can play in building a stronger union.</p>
507	<p><u>Your Well-Oiled Machine is Rusting: The Tools to Salvage and Overhaul</u></p> <p>PRESENTERS: <i>Thomas Kennedy, Connecticut EA; Faith Risolo, Arizona EA</i></p> <p>Your union leadership has been together so long your forgot to look at the changing demographics of your membership. Who are the next leaders in your union? Who is willing to embrace the responsibility? This highly -interactive session examines the changing demographics of your affiliate and the strategies to get all generations involved.</p>
<p>509</p> <p><i>New Session</i></p>	<p><u>Associate Staff in the New Economy</u></p> <p>PRESENTERS: <i>Kathleen Edwards, Ohio ASU; Patty Ray, Ohio PSU</i></p> <p>This session will focus on ways associate staff can remain relevant and respected in our state organizations. We will look at the many technology advances and the opportunities to bring training and education to our fellow members in order to prevent outsourcing or the elimination of positions.</p>
	<p><u>Associate Staff Forum</u></p>

<p>510</p>	<p>PRESENTERS: <i>Wanda Turner, California; Dawn Basuto, NSO Executive Committee</i></p> <p>Let’s continue the conversations to help us in our day-to-day jobs by sharing information and strategies to continue to make ourselves relevant. This will be an open discussion in a safe environment for everyone to share.</p>
<p>601</p> <p><i>New Session</i></p>	<p><u>New Staff Orientation and Member Support – Educating and Engaging Members for a Stronger Union</u></p> <p>PRESENTERS: <i>Allison Clark, NSO- Alaska; Monica Southworth, NSO-Alaska</i></p> <p>This session will focus on the importance of utilizing new staff orientation within NSO affiliates to foster a sense of solidarity from the beginning. We will share recommendations and strategies for ensuring all staff are equally educated, aware, and given opportunities to make their own valuable contributions to the association.</p>
<p>602</p> <p><i>New Session</i></p>	<p><u>The Next Generation of Unionism: Same Values, New Methods</u></p> <p>PRESENTERS: <i>Lisa Enwright Bruzek, United Staff of Minnesota</i> <i>Jessica Schmidt, United Staff of Minnesota</i></p> <p>This loosely-structured session will focus on modern union innovation. Together we will break down barriers and share ideas and strategies in this fascinating opportunity to learn directly from one another. We will discuss topics such as new member engagement, unionism through the millennial lens, networking, the value of belonging, bargaining and organizing challenges within age and geographically diverse local affiliates, and much more. Each session will be unique based on participants.</p>
<p>604</p> <p><i>New Session</i></p>	<p><u>Making the Leap from Associate to Professional Staff</u></p> <p>PRESENTERS: <i>Patty Ray, Ohio PSU; Shawnta Bailey, Ohio PSU</i></p> <p>This session is for associate staff who have a desire to move into professional staff positions. We will explore the pros and cons of making the move and what is required. Participants will develop a personal plan for advancing their career while still remaining in the bargaining unit.</p>

606	<p><u>Internal Crisis Organizing Before and After It Hits the Fan</u></p> <p>PRESENTERS: <i>Don Tarr, NSO Retired; Lois Tarr, NJEA</i></p> <p>Learn effective methods and proactive techniques to anticipate, avoid, organize against, and combat attacks upon your members.</p>
<p>607</p> <p><i>New Session</i></p>	<p><u>Critical Issues in Grievance Arbitration</u></p> <p>PRESENTER: <i>Howard Parish, NJEA-PCA</i></p> <p>This presentation will aid advocates in being more effective in the overall presentation of the case. Topics will include best hearing techniques, mechanics of arbitration, development of hearing statements and final briefs, how to avoid mistakes and maximize chances at winning, as well as other issues.</p>
608	<p><u>Navigating NSO Research</u></p> <p>PRESENTERS: <i>Robert Blackwell, NSO Executive Committee</i></p> <p> <i>Naomi Chisolm, NCSO</i></p> <p>This session will train bargaining team members on how to gather contract information from contracts around the country as they prepare to go the bargaining table.</p>
609	<p><u>Stress Management 101</u></p> <p>PRESENTERS: <i>Rhonda K. Jones, Michigan-MESSA PSA</i></p> <p> <i>Joe Washington, Michigan MEA-PSA</i></p> <p>Most of us want to live happy healthy lives, but most people you ask will admit to experiencing some type of stress. It could be due to the job, a family illness, a relationship crisis, or financial difficulty. Stress is unavoidable. Poorly managed stress can lead to sickness, depression, relationship difficulties, and even chronic disease. In this session, learn how stress can be managed through a positive mindset, physical activity and good nutrition.</p>

610	<p data-bbox="548 197 764 231"><i>Emerging Issues</i></p> <p data-bbox="548 279 1425 449">This session gives participants the opportunity to offer input and suggestions on the chosen topic. The topic for this session is Professional and Associate Staffs Working Together. What can we do as union brothers and sisters to promote unity among our affiliates and present a united front?</p>
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