

Winter Advocacy Retreat, Building on the Legacy



SESSION #	SESSION DESCRIPTOR
<p>101-201</p> <p><i>ALL DAY – 2-DAY SESSION</i></p>	<p><i>Union Finances in the 21st Century</i> <i>Presenter(s): Eric Urban, Michelle Strzynski</i> This session is designed for current and prospective treasurer’s, union officers, and executive committee members. Topics for this full day session include IRS and DOL reporting requirements, fiduciary responsibilities of union officials, legal requirements and best practices regarding expenses and vouchers, the accounting cycle, financial reporting, budget preparation, the “do’s and don’ts of union finance, and NSO Affiliation Standards.</p>
<p>102-202</p> <p><i>ALL DAY SESSION</i></p>	<p><i>Introduction to Grievance Processing</i> <i>(Presenter(s) Joe DiVincenzo, Kelley Compeau</i> Introduction to Grievance Processing is designed for beginners or those in need of a basic refresher. Behind every grievance lurks hundreds of questions! This session will provide a thorough review of the grievance procedure along with the basics in identification and investigation. Instruction, small group interaction and role-play will be used as part of the learning process. Participants will develop skills and knowledge of grievance processing for increased effectiveness in working for our NSO affiliates. <u>Participants MUST BRING A COPY OF THEIR UNION CONTRACT.</u></p>
<p>103-203</p> <p><i>ALL DAY SESSION</i></p>	<p><i>Pause, Assess, and Re-Balance</i> <i>Presenter(s) Matt Elder, Nancy Valenta</i> Due to unprecedented attacks on unions, NSO affiliates are also under attack by their affiliate employers throughout the country. Does your NSO affiliate have the capacity to organize around the dynamics of Power? Does your NSO affiliate have a standing organizing committee? Power is what will rebalance the scales between NSO members and our employers. This session will focus on how to assess your ability to respond to these attacks and provide the foundation to rebalance the power of your affiliate.</p>
<p>104-204</p> <p><i>ALL DAY SESSION</i></p> <p><i>NEW SESSION</i></p>	<p><i>Strut your Stuff-Presentation and Training Skills</i> <i>Presenter(s) Nas Afi, Floyd Cox</i> This will be an interactive Session that will focus on elevating one’s presentation and training skills. This session will: Cover the Training Design process; Examine the First impressions in presentation; Explore best practices in making presentations; Explore how to maximize climate setting and learning environment in training; Cover the characteristics of Adult learning; Examine the Rubric of Effective Training. Participants will leave charged up with a renewed enthusiasm and level of competency of making presentations and for taking their training to the next level.</p>
<p>105-205</p> <p><i>ALL DAY SESSION</i></p>	<p><i>Cracking the Code: Increasing Engagement</i> <i>Presenter(s) Kelley Clouser, Russ Dauberman</i> This session will focus on increasing member engagement to organize and tackle apathy, non-contractual issues, and build solidarity. We will dig deeper to get at why our colleagues are not engaged. Participants should be prepared for a highly interactive session that concludes with a concrete, personalized plan that affiliates can implement immediately. More than one member per affiliate is encouraged to attend for meaningful dialogue but is not required.</p>

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106	<p><i>The Affordable Care Act</i> <i>Presenter(s) Dan Gottheimer</i></p> <p>Changes in the American Health Care System due to the Affordable Care Act, are reshaping aspects of everyone's health care coverage. This session will show our affiliates how to respond to those pressures first by outlining in detail the provisions of the Affordable Care Act and then training participants on how to lay the groundwork to use that information to protect the health care plans. During this session, we will review model contract language from staff agreements. Topics will include, but not limited to: The excise tax, Patient Protections and; rights accorded employees in the workforce. These developments will have a major impact on how we negotiate benefits for both our active and retired members. In addition, this session will end with a presentation and discussion of the new NSO Medicare Supplemental Plan.</p>
107 207	<p><i>Love Your Pension</i> <i>Presenter(s): Mary Ann Jandoli, Dennis Eisenberg</i></p> <p>It's your most important benefit-but so misunderstood! Your Union has an important role, do they employ best practices? Learn how your pension is calculated, how its funded and protected, how it's governed and managed and why it may be under stress. Find out how other state's or the NEA pension compares to your pension benefit.</p>
108 208 NEW SESSION	<p><i>The Good, The Bad, and The Ugly of Conflict</i> <i>Presenter(s): Nathan Greenawalt, Jeff Grinaway</i></p> <p>This session will focus on recognizing conflict, conflict styles, understanding why it exists, and how to work towards a resolution. Conflict exists in every workplace. While it is difficult to eliminate, you will be given skills and resources to help contain conflict among your co-workers. Your personal conflict style will be determined along with understanding other conflict styles and the importance of each in creating and resolving conflict. We will also explore how values, personalities, and cultural differences can lead to conflict. We don't have to like everyone we work with or invite them to dinner, but we must be professional. This is a very interactive session and hands-on.</p>
109 209	<p><i>Bargaining: What you Need to Know to Reach a Settlement</i> <i>Presenter(s) Tom Greene, Bob Thomas</i></p> <p>Everything you need to know from pre-bargaining through the Bargaining Process will be discussed in this session. This will be an interactive session between the participants and the trainers. The goal of this session is for participants to understand the necessary steps and the various options available to reach an agreement.</p>
110 210 NEW SESSION	<p><i>Digital Union Engagement</i> <i>Presenter(s) Jillian Toy, Bobbie Bray</i></p> <p>Utilizing digital and/or social media tools for union engagement capitalized on a shifting movement in the digital world for unions. Communicating, Connecting and Engaging union members on an individual level with digital tools is a great place to start. This workshop will discuss different ways to digitize union engagement, implement the use of Social Media apps, and connect with members on different platforms (i.e. GSuite, Remind, YouTube, Facebook).</p>

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<p>111</p> <p>211</p>	<p>Winning with Words Presenter(s) Larry Spotts, Katherine Clarke</p> <p>Controlling the narrative, both public and internal, is essential in any winning campaign. Yet, many reinforce our opponent’s narrative and don’t even know it! Learn how to WIN using brain science and communication skills that have a solid winning track record. Bring your issue(s) you need to WIN and discover how to FRAME it/them so that your audience engages on your side.</p>
<p>112</p> <p>212</p> <p>NEW SESSION</p>	<p>Healing Achilles: Leading Communities with Perseverance Presenter(s) Demetrice Davis</p> <p>This interactive experiential training will help participants recognize the role that their perspectives and paradigms play in relationship building. Participants will explore the source and influence of the stories they create about themselves and others. Using a storytelling method, participants will draft a personal story about their leadership “truth” and explore common truths to foster better connection with others.</p>
<p>113</p> <p>213</p> <p>NEW SESSION</p>	<p>Everything You Think You don’t know about Harassment, Sexual Harassment and Bullying in the workplace Presenter(s): Brooke Witt, Justin Battalini</p> <p>This program serves to prevent participants from being caught off guard and ending up on the wrong side of sexual harassment, harassment or bullying allegation. Often, people are unaware of what the law or their employer’s policies state. This session covers what the law states, explores common employer policies and breaks myths that many people are operating under. It also explores the negative impact these behaviors have on a workplace. We will further discuss how to represent our colleagues as SO advocates, as well as representing our members if they are accused of engaging in any of these behaviors.</p>
<p>206</p>	<p>Become an NSO Research Whiz Presenter(s) Justin Zartman, Naomi Chisolm</p> <p>While we can’t guarantee you’ll be a Sheldon Cooper after this session, participants will learn how to navigate the NSO Research website. Whether at the bargaining table or preparing for a grievance, participants will understand the tools and information available to be the best advocate for their affiliate and fellow NSO members.</p>
<p>107</p> <p>207</p>	<p>Love Your Pension Presenter(s) Mary Ann Jandoli, Dennis Eisenberg</p> <p>It’s your most important benefit-but so misunderstood! Your Union has an important role, do they employ best practices? Learn how your pension is calculated, how its funded and protected, how it’s governed and managed and why it may be under stress. Find out how other state’s or the NEA pension compares to your pension benefit.</p>
<p>301-401</p> <p>ALL DAY SESSION</p>	<p>Dealing with “You Can’t Do This To Me” – Pushing back on Workplace Bullying and other forms of Workplace Abuse Presenter(s) Rose Tapp, George Luse</p> <p>This workshop is the latest version of evolving sessions to help NSO members deal with workplace bullying and its resulting negative impact on the emotional and physical health of the bully’s target. After employing various training concepts to facilitate a meaningful discussion on this topic, my recent training experience has indicated that using a training method, which relies on the lived experience of the participants to name, analyze and explore plans of action to push back on workplace bullying and</p>

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	<p>other forms of workplace abuse to EMPOWER members to act collectively to impact workplace abuse. Using a process which begins with people’s experiences and depends active participation from the participants. This process respects that participants bring with them valuable knowledge and experiences, and that they can learn from one another unlike the traditional education model in which “students” learn from “teachers”. Subsequent steps include: (1) identifying commonalities, patterns and organizing issues based on participants experience; (2) offering new theories and/or information relevant to what people already know (what other organizations are doing, political/legislative initiatives (3) exploring organizing techniques bringing people together around those issues and (4) planning for action.</p>
302	<p><i>This is not your Mom’s Checkbook- Using QuickBooks to increase your productivity</i> <i>Presenter(s) Eric Watson-Urban, Michelle Strzynski</i></p> <p>This session will provide the basics on how to use QuickBooks to create and maintain accurate, up to date financial reporting. It will include using the program for budgeting, maintaining accurate accounting records using chart of accounts, classification of funds and expenses. <u>Please bring your laptop with the program installed. The online version of QuickBooks is NOT recommended.</u></p>
303	<p><i>NSO at 50 and Beyond</i> <i>Presenter(s) Chuck Agerstrand, Marius Ambrose</i></p> <p>The National Staff Organization was created in 1969 to ADVOCATE, DEFEND, PROTECT, and SECURE the rights of employees who are employed by the NEA and/or one of its affiliated organizations. This workshop will provide an overview of the 50-year history of NSO and the evolution of advocacy programs and resources to assist NSO affiliates in confronting their internal and external challenges. We will review the critical resources that are available through NSO, discuss techniques for member solidarity building and review the qualities of an effective affiliate. Recommended for new NSO members as well as those who want a deeper understanding of NSO programs and resources.</p>
403	
304	<p><i>Just Cause, the 7 Tests: Can Your Employer Pass Them?</i> <i>Presenter(s) Charlie Shaffer</i></p> <p>The Seven Tests 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 <i>MUST</i> for all union advocates.</p>
404	
305-405	<p><i>Cracking the Code: Increasing Engagement</i> <i>Presenter(s) Kelley Clouser, Russ Dauberman</i></p> <p>This session will focus on increasing member engagement to organize and tackle apathy, non-contractual issues, and build solidarity. We will dig deeper to get at why our colleagues are not engaged. Participants should be prepared for a highly interactive session that concludes with a concrete, personalized plan that affiliates can implement immediately. More than one member per affiliate is encouraged to attend for meaningful dialogue but is not required.</p>
	<i>ALL DAY SESSION</i>
306	<p><i>How to Prepare and Win at Arbitrations</i> <i>Presenter(s) Mike Boyer, Justin Zartman</i></p> <p>Most Arbitrations are won or lost during the preparation for the Arbitration. We will teach you how to research and prepare to insure a win. We will focus on putting forward your best arguments and discounting those issues that will not benefit your case and only confuse the Arbitrator. The great secret to Arbitration success is to simplify your arguments. We will teach you how to do that.</p>
406	
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<p>307</p> <p>407</p>	<p><i>Speak Softly, You have a big stick</i> <i>Presenter(s) Tal Hutchins, Beth Chandler Marks</i></p> <p>A workshop designed for beginners or those with limited knowledge of “Roberts Rules” and parliamentary procedures. Learn the rules of running a meeting in fun filled environment. No judgement Zone!</p>
<p>308</p> <p>408</p> <p>NEW SESSION</p>	<p><i>Creating your Future--Strategic Planning for Affiliates</i> <i>Presenter(s) Lynn Adler</i></p> <p>Imagine and create the future you want for your Affiliate! In this facilitated process, leaders will learn how to create their vision of the organization that will meet member needs and interests. Participants will examine who and what they are currently, learn how to design the future and plan how to get there. Since communication and ownership are critical to success, leaders will also learn ways to involve all stakeholders and keep information and ideas flowing.</p>
<p>309</p> <p>409</p> <p>NEW SESSION</p>	<p><i>Emotions, Conflict, and Confrontation</i> <i>Presenter(s) Christine Forbes, Patrice Rust Logan Zekqiel</i></p> <p>Where do you fit in? You’ll discover methods to manage conflict and disagreement to reach a positive outcome, tips for applying “emotional first aid”, ways to manage control of your actions and emotions and ways to avoid the traps of infighting.</p>
<p>310</p> <p>410</p>	<p><i>CommUNIONcation (Advanced)</i> <i>Presenter(s) Thomas Hayden</i></p> <p>For Affiliates that have a social medial and or/web presence, this workshop will focus on maximizing these tools to build internal capacity and strengthen external messaging. Participants will take a deep dive into Facebook’s business tools such as Analytics, Ads Manager, and Groups. This workshop will also feature easy to use web tools and GoogleApps Suite that will improve efficiency and can enhance an affiliates image. Participants are encouraged to “BYOD” and have access to Social Media and web accounts prior to the workshop as portions will be interactive, with a focus on sharpening these resources in real-time for your union.</p>
<p>311</p> <p>411</p>	<p><i>Getting To Maximum: Organizing Around Compensation</i> <i>Presenter(s) Sarah Favinger, Bob Willoughby</i></p> <p>Compensation is quite often the top priority in bargaining, with the primary model of compensation being the salary guide. Salary guides are one of the most discussed and most misunderstood aspects of the negotiations process. This workshop will cover the basics of salary guide construction; including average salary, minimum/maximum length, increment costs and settlements. We will also delve into what other forms of compensation can be bargained. <u>Bring a copy of your salary guide as we will be doing a hands-on analysis.</u> Be prepared for some interesting discussions and new ways to think about compensation packages.</p>
<p>312</p> <p>412</p>	<p><i>PPO’s Q-HSA’s and HRA’s Bargaining Health Care</i> <i>Presenter(s) Cory Schachern, Terrie Moore</i></p> <p>As more and more unions face new or continuing pressure to drastically reshape their health care coverage, NSO unions are sure to be facing similar pressure in the future at the bargaining table. This session will detail the positive and negative attributes of various plan designs and savings vehicles, taking into consideration the impact on members (active and retired), and address strategies for the table.</p>

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<p>313</p> <p>413</p> <p>NEW SESSION</p>	<p><i>The Power of Positive Working Associate and Professional Staff Relationships</i> Presenter(s) Cardina Johnson, Laura A. Wilkinson</p> <p>We are all hired to work in unity toward the same goals. Through discussion and small group exercises, this training will focus on the importance of positive relationships between Associate and Professional Staff. How to strengthen the effectiveness of this critical relationship, through best practices and by seeking realistic outcomes will be explored.</p>
<p>314-414</p> <p>ALL DAY SESSION</p> <p>NEW SESSION</p>	<p><i>Bargaining Blue Printing – Using Org4Power Concepts</i> Presenter(s) Mike Horner, Janet Beck</p> <p>Using Org4Power methods develop efficient, effective management bargaining proposals. Intended for bargaining chairs (members) organizing chair (members) and leadership teams. Work together and coordinate to counter management’s ability to undermine your proposals and defend against attempts at regressive takebacks. This tool will ground bargaining based on member values and goals. It is the perfect pre and post bargaining assessment tool. Helps frame issues in the 100% right position. Each team should bring a list of issues they plan to address (including what they anticipate management bringing to the table). <u>NSO affiliate teams encouraged.</u></p>
<p>402</p> <p>NEW SESSION</p>	<p><i>What’s my Role in Union Finances?</i> Presenter(s) President Brad Darjean, Eric Watson-Urban, Michelle Strzynski</p> <p>All officers and executive committee members have a fiduciary role in their union. This session will address what role you have as an officer, how you can ensure that your union finances are protected, and what to do if you have concerns regarding the union treasury. This session will include practical, real world examples of how to protect your members’ dues dollars.</p>
<p>501</p> <p>601</p>	<p><i>Don’t Sink your own Retirement Ship (FOR MEMBERS OF THE NEA PENSION PLAN ONLY)</i> Presenter(s) Maggie Copeland</p> <p>Retirement is a benefit we work for our entire lives; don’t inadvertently ruin it as the bargaining table. Bargaining the wrong exit incentives or other plans to reduce overall payroll can ultimately sabotage the overall health of the Plan and ultimately everyone’s retirement benefits. There are alternatives that achieve the same goal without the unintended consequences. Learn how the NEA Pension Plan works, how you and your affiliate can keep it secure for everyone’s retirement and how you can do that without necessarily having to sacrifice salary and benefits now.</p>
<p>502</p> <p>602</p>	<p><i>Crime and Punishment</i> Presenter(s) Mike Boyer, Rob Day</p> <p>In this course the participant will learn how to tell whether or not Management has or is about to commit an Unfair Labor Practice during negotiations and in general. The participants will learn how NLRB relies upon “patterns” of behavior in order to find ULP’s and how certain activities by Management are automatically viewed as ULPs. The participants will also learn how not to commit ULPs themselves.</p>

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503	<p>Writing Contract Language Presenter(s) Jackie Rhodes, Mary Henson</p> <p>This is a beginner’s session on writing contract language. Discussion will be on bargaining when, how, why, what to include in proposals, including NSO resources and assistance. Everyone will spend time creating (writing), reviewing and discussing contract language. This is a hands-on session with lots of interaction, a question and answer period, and a fun time for all who are new to this portion of bargaining.</p>
603	
504	<p>The Marriage of Bargaining and Organizing Presenter(s) Kim Mina, Edna Jenkins</p> <p>We all know how important organizing is for achieving a successful agreement with our employers. But does your affiliate have a culture where the bargaining and organizing teams work in concert with one another to develop plans for achieving the successful agreement? This session will show you how the marriage between the two teams has been effective in several NSO affiliates, give you best practices and guide you with developing whatever plans your need to ensure that your affiliate can develop this culture. This session uses many of the principles from the Organizing for Power Program.</p>
604	
NEW SESSION	
505	<p>Emotional Intelligence Presenter(s) Nas Afi, Floyd Cox</p> <p>This will be an interactive session that focuses on the following: the skills for the two domains and competencies of Emotional Intelligence; to explore your own EI and EI challenges; to examine how EI is the key to bridging expertise, knowledge, skill and performance.</p>
605	
606	<p>Running a Clean and Compliant Union Election Presenter(s) Eric Watson-Urban, Tricia Papapietro</p> <p>The US Department of Labor has very stringent regulations regarding the election of Officers, RA Delegates, and Executive Committee whether conducted by mail or at a General Membership Meeting. This session will cover the in’s and out’s of how to stay compliant with the DOL and your Constitution and By-laws. Participants are encouraged to bring a copy of their current Constitution and By-Laws, Elections Manual, and Standing Rules or Policies to the session.</p>
NEW SESSION	
506	<p>Associate Staff Forum Presenter(s) LaTasha Ball, Patrice Rust Logan Zekqiel</p> <p>This is an important venue for Associate Staff to come together to discuss issues facing them across the country, particularly as it relates to the reduction in positions and changing roles. There will be an opportunity to share stories, ideas and strategies that we can all use. We will also discuss the benefits of being a part of NSO, using the resources and training opportunities that are available.</p>
507	<p>Is Your EAP Working For you and your members? Presenter(s) Gene Sharp, Sandra Armstrong</p>
607	<p>NSO affiliate locals are often covered by employee assistance programs (EAP) that are paid for by the employer. Because of this structure, it is essential for NSO Locals to have an active advocate role in the EAP program.</p>
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508	<p>Interest Based Problem Solving Presenter(s) Tonya Karpinski, Gezelle Oliver</p>
608 NEW SESSION	<p>In this session, the participants will be introduced to the principles and practice of Interest Based Problem Solving. Participants by the end of the session will be able to answer the following: What is Interest Based Bargaining/Problem Solving; When is it appropriate to use this approach; How is approach different than traditional bargaining and problem solving.</p>
509	<p>Financial Health and Wellness Presenter(s) Robert P. Lyons, Stephanie Winston</p>
609	<p>Financial wellness is an employee benefit that more than 80% of private employers have, or plan to offer and is something we can bargain into our contracts. Financial stress is a recognized workplace health and productivity issue. We can bargain financial quality of life issues and money management support. This session will also help you understand your own finances, investments and retirement planning. We will also explain financial concepts in understandable terms. Concepts from prior sessions will be expanded upon. Plan trustees, negotiators and investors should gain new financial skills from this session.</p>
510	<p>President's Roundtable Presenter, Brad Darjean, NSO President</p> <p>Join NSO President, Brad Darjean, for an in-depth discussion on what's happening around the Country, current NSO landscape and climate.</p>

Changes made 9/4/19 @ 8:47 a.m.