



2012 Winter Advocacy Retreat Session Descriptions

ADVOCACY

SESSION #	SESSION DESCRIPTOR
406	<p>Arbitration: It's Not Rocket Science</p> <p>Everyone can learn from this experience, new advocates or experienced practitioners of the art. Key concepts include developing our case, avoiding common errors in arbitration, witness selection and preparation, opening and closing statements, and direct and cross examination</p> <p>Presenters: Don Tarr, Lois Tarr</p>
206, 401	<p>Basic Labor Law Under the NLRA</p> <p>Participants will review the major sections of the National Labor Relations Act and discuss various scenarios depicting how the NLRA impacts the workplace.</p> <p>Presenter: Wanda Van Pelt</p>
204-304 All Day, One Day Session	<p>Down to Basics: Grievance Processing</p> <p>This workshop is geared to those who are new to or only moderately-experienced with grievance processing. This session will focus on how to use the grievance procedure as an orderly process for resolving contract disputes. Participants will actively engage in a comprehensive review of the grievance process, from the "what" and "why" to the "how" and "when" and will leave the session with an understanding of how to write and process grievances in the steps prior to arbitration. Participants will also have an opportunity to investigate, write and present grievances. We will also consider alternatives/enhancements to the formal procedure, such as direct action. Please bring your own collective bargaining agreement.</p> <p>Presenter: Dorine Levasseur</p>
413	<p>Grievance Processing: Know When to Hold 'em and Know When to Fold 'em</p> <p>This session will focus on the decision-making process used in deciding whether or not to arbitrate a grievance. Through the examination of actual NSO grievance cases, participants will gain knowledge of when to settle a grievance, when to proceed to arbitration. Participants will explore ways to communicate the decision to settle or to arbitrate the grievance to the affiliate membership. A review of NSO's grievance assistance procedures will be provided as well.</p> <p>Presenters: Marius Ambrose, Linda Schneider</p>

<p>414, 509</p>	<p><i>Intermediate Grievance Processing</i></p> <p>This session is designed for participants who are knowledgeable about the basics in the identifying and filing of grievance issues. This session will identify what needs to be accomplished at each step of the grievance procedure beyond the initial filing and investigation. This will include an in-depth analysis of each step of each participant’s grievance procedure and an evaluation of the step’s value in the procedure as it prepares us for a possible arbitration of the issues.</p> <p>This is a training that will hold your attention. The format will appeal to a variety of learning styles – short lectures, panel discussions, case studies and actual labor/management demonstrations. Participants must bring a copy of their union contract.</p> <p>Presenters: Joe DiVincenzo, Cathy Wyzykowski</p>
<p>207-307 All Day, One Day Session</p>	<p><i>Nail It: Strengthen Your Written Advocacy</i></p> <p>Rebuttals, grievances, statements and other written documents are critical for effective member advocacy. These are the focal points of this interactive workshop designed to help you and your members advocate for employee rights. Our timing, choice of words, tone and delivery mediums all affect our success. Let’s help each other get even better at what we do.</p> <p>Presenter: Charles Goodmacher</p>
<p>412-512 All Day, One Day Session</p>	<p><i>Potpourri of Issues in Contract Enforcement</i></p> <p>This session will delve into the many problems NSO staff and advocates in NSO are facing in defending their collective bargaining rights through the grievance process, arbitration and before the National Labor Relations Board (NLRB). You will get information that will better assist you in performing your responsibilities as an advocate. There will be time for questions.</p> <p>Presenters: Robert Day, Esq., Jack Schamel</p>
<p>212, 510</p>	<p><i>The Secrets Behind An Arbitrator’s Decision</i></p> <p>This workshop will give participants an opportunity to learn what makes for good hearing techniques and what NOT to do from an arbitrator’s point of view. Attendees will learn what behavior angers an arbitrator and what activities help toward reaching the remedy sought. Role playing will give participants an opportunity to compare their decisions to actual outcomes.</p> <p>Presenter: Howard Parish</p>
<p>308, 404</p>	<p><i>The Seven Tests for Just Cause – Can Your Employer Pass Them?</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. This foundation of employee rights is a MUST for all union advocates.</p> <p>Presenter: Charlie Shaffer</p>

BARGAINING

SESSION #	SESSION DESCRIPTOR
411, 513	<p><i>\$, \$, \$ – Must Be Funny</i> But it's not just about having money – it's how you spend it too. So is your affiliate getting the most out of its financial resources? Are you prepared for that "rainy day"? Learn how to develop, monitor and adjust your budget to maximize the affiliate's power. This session is a hands-on workshop which includes creating policies and procedures around goal setting and budget development. Now is the time to make sure your affiliate is financially prepared. As we face more and more obstacles to effective unionism, this workshop is a must in maintaining our strength and unity. Presenters: Pat Clark, Scarlett Riebold</p>
402	<p><i>Assertiveness and Bargaining . . . A Powerful Combination</i> Assertive behavior is achieving the right balance between your needs and those of others. Assertive behavior is standing up for your own rights in a way that does not violate the rights of someone else. A negotiating style profile based on the model described in Ury Fisher's <i>Getting to Yes</i>, will be used. This profile offers a simple framework for thinking about one's negotiating style and the likely effect that style in a negotiating situation. We will discuss the impact of each style on the negotiations process and come to understand how assertive behavior and negotiating styles work together in bargaining. Presenters: Tom Greene, Bob Thomas</p>
502	<p><i>Bargaining in Difficult Economic Times: It's Not Hopeless!</i> Our economy continues to stagnate and everyone is feeling the pressure at the bargaining table. Learn to develop strategies that will aid your quest for fairness and equity in negotiations, while examining frequently overlooked contract gains that can make your collective agreement more solid and union friendly. Presenters: Don Tarr, Lois Tarr</p>
205-305 All Day, One Day Session	<p><i>Can I Get That In Writing? Contract Language for "Newbies"</i> This session is geared to those new to the bargaining process or uncertain how to begin and proceed in preparing bargaining proposals for bargaining. Issues to be covered include when/here/how to start preparing; NSO resources available before and during bargaining; what should/should not be included in proposals; and the interaction of the bargaining team during this process. Participants will spend time writing contract language. There will be time for group discussion and Q&A's. Come join other "newbies" on the path to learning about bargaining and have some fun while you are doing it! Presenters: Jackie Rhodes, Dave Stafford</p>
309	<p><i>Show Me the Money . . . Organizing/Bargaining Around Salary Guides</i></p>

	<p>Salary guides are one of the most discussed – and most misunderstood – aspects of the negotiations process. In this workshop, we’ll discuss the basics of salary guide construction from start to finish. We’ll look at the issues of average salary, minimums and maximums, guide length, increment costs and settlements. Bring a copy of your salary guide and be prepared for a hands-on analysis and some interesting discussions!</p> <p>Presenters: Patti Major, Bob Willoughby</p>
210, 407	<p><i>Using NSO Research at the Table</i></p> <p>We will review online and other resources available to assist affiliates in bargaining.</p> <p>Presenters: Ruth Ivory, Peggy Nabors</p>

COMMUNICATION

SESSION #	SESSION DESCRIPTOR
410	<p><i>R U Ready for Social Media?</i></p> <p>Your mother told you that because everyone else is doing it doesn’t mean you have to do it too. The same is true for social media. Jumping into the social media pool without truly understanding if it’s right for you can mean disaster. Are you and your audiences ready for social media? Is it the best way to communicate? Do you have the right technology to take it on? This session is for the novice who’s thinking about taking the plunge into social media. We’ll answer your questions and help you create a sample video, post it online, and email it using an iPad, Smartphone, and computer!</p> <p>Presenters: Rosemary Carey, Donette Ramey</p>
306	<p><i>Assertiveness and Managing Conflict</i></p> <p>Assertive behavior is achieving the right balance between your needs and those of others. Assertive behavior is standing up for your own rights in a way that does not violate the rights of someone else. Conflict is ever present. There are five basic conflict management behaviors and each can be effective in given situations. Selection of a conflict management behavior has impact on the outcome. Participants will develop a better understanding of assertive behavior and assess their present level of assertiveness by identifying the differences between passive aggressive and assertive behaviors.</p> <p>Presenters: Tom Greene, Bob Thomas</p>
211, 506	<p><i>Electronic Communications and Social Networking Safety – How it Affects Your Employment</i></p> <p>Technology is an ever-changing means of communication that can be an integral tool within the association community. It is imperative for members to be aware of the shortcomings associated with using technology and the potential negative impact social networking can have on an individual’s employment and/or the Association. Participants will examine security and privacy issues as it relates to association use of technology as a communication tool.</p>

	Presenter: Glenn Johnson
213, 508	<i>Flying Your TRUE Colors</i> True Colors fosters understanding by learning to view the world through other lenses. It promotes responsibility, respect and building on strengths while enhancing relationships by bringing out the best in each of us. Laugh, giggle and grin while discovering yourself. Presenters: Latasha Ball, Thomas Jowhar
507	<i>Social Media – Tying It All Together</i> If you've already taken the plunge into social media, then this session is for you. Learn how to organize and tie everything together for an effective social media strategy. We will create a video and use a variety of methods to make it available to your members. We'll provide a forum for discussion and sharing. Let's find out what's worked and what hasn't been such a success. Let's share examples and stories. Let's talk about what's next. Come share your expertise. Presenters: Rosemary Carey, Donette Ramey

LEADERSHIP

SESSION #	SESSION DESCRIPTOR
312, 512	<i>Keep Your Meeting in Motion</i> Do you want to be in control when you preside at a meeting? If so, this overview of parliamentary procedure should be of great help. Come prepared to ask specific questions about what you can do or should have done in situations in your local affiliate meetings. Presenter: John Reilly
203-303 All Day, One Day Session	<i>Treasurers – Protect Your Affiliate</i> Discussion and review on IRS and DOL requirements will be held. We will also discuss proper bookkeeping and keeping records. How do you keep your affiliate in good standing with NSO? Bring along your questions and concerns; we will work on solving them. Presenters: Ron Goldenstein, Vera Stafford, Michelle Strzynski

MISC

SESSION #	SESSION DESCRIPTOR
208, 403	<i>Change on Your Terms!</i> You may want to change jobs within your union or you may wish to make changes in your personal life. All change has consequences . . . find out how to get the upper hand and make change work for you. Note: This is a very interactive, participatory session. Presenters: Stacy Paul, Stephanie Wolkin
405, 501	<i>Understanding Workplace Bullying</i> There has been a lot of media attention focused on the issue of student-

	<p>on-student bullying – but this session deals with bullying of employees and colleagues. Those being bullied at work feel more than merely overworked and underappreciated. The fear, shame, humiliation and loss of dignity that come from bullying can affect a worker’s health and creep into every other aspect of life. This workshop is designed to provide members and affiliates with strategies to deal with this issue. We will also discuss the Health Workplace Bill, anti-bullying legislation currently working its way through the legislative process in several states.</p> <p>Presenter: George Luse</p>
514	<p><i>Yes, They Really Are Out to Get Us: Public Education and Organized Labor Under Attack</i></p> <p>Powerful forces in our society seek to undermine the education profession, privatize public schools, and strip employees of their union rights. You might be familiar with some of our traditional adversaries, driven by free-market ideology or motivated by the prospect of profit. You may not be aware of their neo-reformer allies. Who are they? What do we know about their tactics and strategies? How can we go on the offensive? In this session we will discuss the various components of the “vast right wing conspiracy” and their “neo-reformer” allies, review their agenda for shrinking government, eliminating organized labor (like NSO and NEA), and “reforming” education; and explore various strategies for preparing and responding effectively to preserve the rights of unions and union members.</p> <p>Presenter: Susan Nogan</p>

ORGANIZING

SESSION #	SESSION DESCRIPTOR
<p>101-301 Two-day, All Day Session</p>	<p><i>Organizing for Power Module I</i></p> <p>This session builds more powerful and effective locals through organizing using the Constant Organizing Goals (COG) method. Organizing for Power! engages participants in mastering organizing knowledge and in practicing organizing skills. Participants will learn to think strategically about organizing.</p> <p>Presenters: Cindy Einsworth, Bob Lindquist</p>
<p>102-302 Two-day, All Day Session</p>	<p><i>Organizing for Power Module II</i></p> <p>This session uses the power and union values concepts introduced in Module I to provide staff a deeper and more concrete application of the relational and interpretative functions of organizing. This session explores how to apply these organizing dynamics to effectively build real organizational power. Module I is a prerequisite.</p> <p>Presenters: David Crim, Jeff Wahlquist</p>

PENSION & HEALTH BENEFITS

SESSION #	SESSION DESCRIPTOR
408	<p><i>“Trump” Your 401-k Investments Today and Make Them Last</i></p> <p>Can I ever afford to retire? As an investor would Donald Trump say to you “You’re Fired”? This session is for the intermediate skill level staffer, generally within 10 years of retirement, who must make the 401-k and defined contribution amount last forever. Retirement basics, including Roth IRA’s, Social Security, Long Term Care, retiree health, etc., will also be covered. What are the best practices for spending down the balances? Bring a copy of your last investment statement.</p> <p>Presenter: Dennis Eisenberg</p>
311, 409	<p>Defend Your Pension!</p> <p>Think your pension is safe and secure? Think again! A combination of forces—many beyond your control—are coming together to threaten your retirement plan, whether it be a Defined Benefit or a Defined Contribution plan. This session will explore the types of changes being contemplated, such as formula changes, freezing of benefits offered by one type of plan and moving to another type of plan that costs less money, withdrawal from the NEA plan, and reducing the contributions to Defined Contribution plans. The impact of these types of changes will be examined. Participants will review the impact of the Pension Protection Act of 2006 and the recently passed Pension Relief Act. Legal remedies that exist to protect your benefits and the federal agency that guarantees your benefits—the Pension Benefit Guaranty Corporation (PBGC) will also be explored. This session is a must for participants who are currently or will someday be involved in retirement contract negotiations.</p> <p>Presenter: Mort Reinhart</p>
503	<p><i>Defined Benefit Retirement Plan</i></p> <p>Do you know about your retirement and how it works? 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 discuss retirement formulas, early retirement, COLA, vesting purchase of prior credit, Section 415 limitations, vesting, switching to a Defined Contribution plan termination, and how to prepare for retirement, along with many other topics.</p> <p>Presenters: Michael Coleman, Daniel R. Saling</p>
505	<p><i>Defined Contribution, 401-k Plans and Choosing a Financial Advisor</i></p> <p>What are the ingredients of a good Defined Contribution or 401-k Plan? How does your plan compare with a model plan? Do you have the background knowledge, know-how, or the will to choose where that money should be invested, now or in retirement? Are you receiving an inheritance or a large sum of money or going through a life-changing event (divorce, remarriage, college bills, etc?) If so, how does one select a competent financial planner or advisor if you need one.</p> <p>Presenters: Don Frattini, Ron Goldenstein</p>

<p>209</p>	<p><i>Eat Your Wheaties . . . Get Ready to Bargain Retirement Benefits!</i></p> <p>You'll need lots of energy in your next round of bargaining in order to protect retirement security for your members. The keys to your success will be – preparation, preparation, and preparation. This session will help you prepare and arm you with strategies to do your best work. You'll learn what affiliates who are fighting the fight have done when faced with concession bargaining; what questions to ask; the important documents to review; and the research available to help you evaluate your contract and make comparisons. There will be discussion of the federal Pension Protection Act (aka, "The Let's See What We Can Do to Threaten Defined Benefit Pensions Act") and practical considerations for bargaining an array of pension and post-retirement medical benefits.</p> <p>Presenters: Dennis Eisenberg, Mary Ann Jandoli</p>
<p>310, 504</p>	<p><i>Insurance Under Attack!</i></p> <p>Our bargained insurance benefits are under attack. Employers are looking to employees to save on benefit plans, either through higher cost sharing or benefit reductions—or both! This session will evaluate different aspects of employer-provided life and health insurance: health plan design, prescription drugs, disability insurance, vision, dental, long-term care, and life insurance. We will focus on "consumer-driven" health plans (high-deductible health plans with healthcare savings accounts), with a real-life exercise. Trends and research are provided to help bargainers with qualified information at the bargaining table.</p> <p>Presenters: Marian Solomon, Douglas Terwilliger</p>