

Winter Advocacy Retreat, One Union, One Voice



SESSION #	SESSION DESCRIPTOR
<p>101-401</p> <p>ALL DAY – 2-DAY SESSION</p>	<p><i>Essentials of Organizing for Power (O4P)</i> PRESENTER(S): Kimerly Mina, Beth Ludeman</p> <p>Organizing our staff unions in a post-Janus world has never been more ESSENTIAL. Learn the most effective way to deal with management and support successful bargaining while taking advantage of building relationships with colleagues. Team registration is encouraged! NSO’s signature program is being retooled, so come and get the foundation of what you need to thrive in our new environment as this O4P module gets offered for the last time at WAR!</p>
<p>102-202</p> <p>ALL DAY SESSION</p>	<p><i>Introduction to Grievance Processing</i> (Presenter(s) Joe DVincenzo</p> <p>Introduction to Grievance Processing is designed for beginners or those in need of a basic refresher. SKA’s necessary to be effective in the processing of grievances. Behind every grievance lurks hundreds of questions! This session will provide a thorough review of the grievance procedure along with the basics in identification, investigation, instruction, small group interaction and role-play will be used as part of the learning process. As they develop skills and knowledge of grievance processing for increased effectiveness in working for our NSO affiliates.</p> <p>Participants MUST BRING A COPY OF THEIR UNION CONTRACT.</p>
<p>103-203</p> <p>ALL DAY SESSION</p>	<p><i>Union Finances in the 21st Century</i> Presenter(s): Eric Urban, Michelle Strzynski</p> <p>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 a union finance, and NSO Affiliation Standards.</p>
<p>104-604</p> <p>ALL DAY – 3-DAY SESSION</p>	<p><i>Intensive Arbitration Training, From Soup to Nuts</i> Presenter(s) Don Tarr, Lois Tarr</p> <p>Be a part of this hands-on arbitration training that covers topics such as arbitration preparation, avoiding common errors, presentation of witnesses and evidence, direct and cross examination, opening and closing statements and writing briefs. This workshop culminates in attendees assuming the roles of union and management in presenting a case before a mock arbitrator.</p>
<p>105</p> <p>205</p> <p>NEW SESSION</p>	<p><i>Pause, Assess, Rebalance</i> Presenter(s) Matt Elder, Nancy Valenta</p> <p>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>

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<p>106</p> <p>411</p>	<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>
<p>206</p> <p>311</p> <p>NEW SESSION</p>	<p><i>Cracking the Code to Member Engagement</i> <i>Presenter(s) Kelly Clouser</i></p> <p>This session will tackle the age-old problem of dealing with apathetic membership. We will take an in-depth look at reasons why members are sitting on the sidelines and how to get the of the bench and onto the field! Participants should be prepared for a highly interactive session that will conclude with a concrete, personalized plan that they can take back and implement immediately. More than one person per affiliate is encouraged for a meaningful dialogue but is not a requirement.</p>
<p>107</p>	<p><i>Associate Staff Forum</i> <i>Presenter(s)</i></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>
<p>207</p> <p>307</p>	<p><i>Introduction to: CommUNIONcation</i> <i>Presenter(s) Thomas Hayden, Denise Policastro</i></p> <p>Communication within a union should focus on building capacity, increasing member engagement, and strengthening unity. This workshop will introduce participants to the basics of achieving these goals through the benefits of social media tools such as Facebook (Pages & Groups), Instagram, and Twitter. Participants will also learn how to build a simple and inexpensive website. Workshop time will also be dedicated to the use of these tools for public-focused, external communications. Focuses on affiliates that do not yet have a social media or web presence, participants are encouraged to “BYOD” (Bring your own device) and create social media accounts prior to the workshop as portions will be interactive, with a focus on building these resources in real-time for your union.</p>
<p>108</p> <p>208</p>	<p><i>Just Cause, the 7 Tests: Can Your Employer Pass Them?</i> <i>Presenter(s) Charlie Shaffer</i></p> <p>A large portion of the work done by Unions, including the NSO, centers on advancing and protecting employee rights. Some of that advocacy is in the bargaining arena, some grievances, and some employee discipline cases, requires the Union to vigorously promote the enforcement of the arbitrable standards for just cause. This session will use actual cases, analyze them and determine which of the 7 tests was used for each decision. It will give participants a detailed hands-on analysis of Just Cause principles for use when cases arise in their local affiliates.</p>

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<p>114</p> <p>214</p> <p>NEW SESSION</p>	<p>Organizing and Bargaining our Own Contracts, Post Janus Presenter(s) Todd Jaeck Will Klatt</p> <p>The presentation will look at the strategies and tactics Ohio has been using to engage members in the Professional Staff Union. Over the past several years, Ohio PSU has increased its focus on building internal capacity and within its own membership. This presentation is designed to provide timely bargaining and organizing ideas to help other state unions collaborate within their organization to drive their state organizations to improve working conditions.</p>
<p>302</p>	<p>Part 1 Workplace Bullying -Awareness Presenter(s) George Luse, Rose Tapp</p> <p>This session raises awareness that bullying in the workplace is inappropriate for bullying targets and bystanders and creates a toxic environment in the workplace. Further, through education and training individual members and their unions can lessen the impact of workplace bullying (WB) and create a culture which is not tolerant of (WB).</p>
<p>402</p>	<p>Part 2 Workplace Bullying Prevention Presenter(s) George Luse, Rose Tapp</p> <p>(This session is intended for those who have taken Part 1-Awareness or have previously attended “Understanding Workplace Bullying at a previous WAR College). In the newly designed Part 2, participants will learn strategies that rank and file members (individuals and bystanders) can employ in WB situations, and strategies that unions can employ (including organizing, collective bargaining and analyzing the impact of internal union balance of power) in support of rank and file members and to develop an anti-bullying culture within the union and the workplace</p>
<p>303</p>	<p>It’s Not your Grandma’s Checkbook! How QuickBooks can make your job easier. Presenter(s) Eric Urban, Michelle Strzynski</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>
<p>305</p> <p>405</p> <p>NEW SESSION</p>	<p>Pause, Assess, Rebalance Presenter(s) Matt Elder, Nancy Valenta</p> <p>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>306</p> <p>406</p> <p>NEW SESSION</p>	<p>Power Analysis – Foundation of Strategic Organizing Presenter(s) Edna Jenkins, Janet Beck</p> <p>This session will cover the basics of conducting a power analysis of the union’s internal environment, the Employer’s environment and the Community Environment that surrounds your affiliate to assist you in determining the “Lay of the Land”. This analysis which includes identifying strengths, weaknesses, opportunities and threats within each environment; identifying the actual people who likely serve as powerful allies and decision makers. This will lay the foundation for effective strategic organizing planning. You will also learn to identify those who may detract or undermine your affiliate’s organizing, so you can plan to proactively limit their ability to negatively impact your affiliates goals for your members.</p>

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<p>308</p>	<p>Presidents Roundtable Presenter(s) NSO Executive Committee</p> <p>Join NSO leadership and Affiliate Presidents for an in-depth discussion on what’s happening around the country, the current NSO landscape and climate.</p>
<p>309</p> <p>409</p>	<p>Speak Softly, You’ve Got A Big Stick! Presenter(s) Tal Hutchins, Beth Chandler-Marks</p> <p>This workshop is designed for participants with little or limited knowledge of parliamentary procedures. This interactive workshop will give participants basic knowledge and training on parliamentary procedures which can be used to increase affiliate effectiveness.</p>
<p>310</p> <p>610</p> <p>NEW SESSION</p>	<p>ULP’s Crime and Punishment Presenter(s) Mike Boyer, Rob Day</p> <p>Participants 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 to not commit ULPs themselves.</p>
<p>312</p> <p>412</p> <p>NEW SESSION</p>	<p>You Did What? Tips for Representing Members Presenter(s) Martha O’DeBlieu, Karen “Skip” Perry</p> <p>Explore steps you can take to ensure that you represent members well in investigatory meetings with management and respond appropriately to verbal and written reprimands. Participants will engage in role-playing exercises using specific scenarios faced by union members.</p>
<p>313</p> <p>413</p>	<p>Getting to Maximum, Organizing Around Compensation Presenter(s) Sara Favinger, Bob Willoughby</p> <p>Compensation is quite often the top priority in bargaining, with the primary mode of compensation being the salary guide. Salary guides are one of the most discussed and most misunderstood aspects of the negotiation process. This workshop will cover the basics of salary guide construction including average salary, minimum and maximum guide length and, increment costs settlements. We will also delve into what other forms of compensation can be bargained. Bring a copy of your salary schedule as we will be doing hands on analysis. Be prepared for some interesting discussions and new ways to think about bargaining compensation packages.</p>
<p>314</p> <p>414</p> <p>NEW SESSION</p>	<p>Financial Health & Wellness Presenter(s) Robert Lyons, Stephanie Winston</p> <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. Plan trustees, negotiators and investors should gain new financial skills from this session.</p>

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<p>315</p> <p>415</p>	<p>Trump Your 401 (K) Presenter(s) Dennis Eisenberg</p> <p>Can I ever afford to retire? Calculate your “Number”, of years until you can retire. How to invest to make the 401(k) and other investment’s grow. Retirement basics including the Roth IRA’s, Social Security, retiree health, etc. will also be covered. What are the best practices for spending down balances? Should you hire an advisor? Bring a copy of your last investment statement. Now is the time to gain skills and knowledge that can help the future “you” retire in style.</p>
<p>407</p> <p>NEW SESSION</p>	<p>Advanced CommUNIONcation Presenter(s) Thomas Hayden, Denise Policastro</p> <p>For affiliates that already have social media and/or a web presence, this workshop will focus on maximizing these tools to build internal capacity and strengthen external messaging. Participants will take a deep dive in Facebook’s business tools such as Analytics, Ads Manager, and Groups. This workshop will also feature easy-to use web tools and the GoogleApps Suite that will improve efficiency and can enhance an affiliate’s image. Participants are encouraged to “BYOD” (Bring your own device) 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>408</p>	<p>Navigating NSO Research Presenter(s) Dawn Basurto, Justin Zartman, Naomi Chilsolm</p> <p>Participants will learn how to use the NSO Research Website and how to obtain information gathered from other NSO Affiliates.</p>
<p>410</p> <p>510</p>	<p>NSO, United to Lead, Promote, Secure & Defend Presenter(s) Chuck Agerstrand, Marius Ambrose</p> <p>The National Staff Organization was created in 1969 to defend, protect, secure and defend employees who are employed by the NEA and/or one of its affiliated organizations. Association employees are universally unionized and work under a collective bargaining agreement. This workshop will provide an overview on the history of NSO and the evolution of programs and resources developed to assist NSO affiliates in confronting their internal and external challenges. This workshop will help YOU, the LEADER, to ORGANIZE, ADVOCATE, EDUCATE YOUR UNION MEMBERSHIP ON THE VALUE OF YOUR AFFILIATION WITH NSO. This session is good for those new to NSO and for those who desire a deeper understanding of the role of NSO, its structure and the resources available to members and affiliates.</p>
<p>501</p> <p>601</p> <p>NEW SESSION</p>	<p>How to work with Difficult Co-Workers, Clients and Clowns Presenter(s) Cardina Johnson, Robert Lyons</p> <p>The workplace is a complex environment. This sensitive structure can be disrupted by toxic co-workers, bad bosses and external pressure. If you have ever worked with a bully, the gossip, the constant “victim”, the usual suspect, passive-aggressive types, narcissists, paranoids and/or slackers, you will appreciate this session. We will identify these types and offer suggestions about how to deal with them.</p>
<p>502</p> <p>602</p> <p>NEW SESSION</p>	<p>Emotional Intelligence (EI) Presenter(s) Nas Afi, Floyd Cox</p> <p>This is an interactive training that will focus on the following: exploring understanding and examining the skills of Emotional Intelligence. Identifying ones own individual Emotional Intelligence strengths and looking at how EI is key to bridging your expertise, knowledge and performance.</p>

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503	<p><i>Let's Give them Something to Talk About</i> <i>Presenter(s) Kathleen Edwards, Matt Ides</i></p>
603 NEW SESSION	<p>In the changing economic and political environment, effective working relationships among NSO brothers and sisters are critical for maintaining membership and growing the labor movement. New campaigns, tools and resources will require ongoing dialogue about responsibilities, fairness and equity in our workplace. Participants will engage in a dialogue about best practices in workplace communication and be provided an overview of how our NSO affiliates are establishing effective teams.</p>
505	<p><i>It's Time to Collaborate, whether we like it or not</i> <i>Presenter(s) Lynn Adler</i></p>
605 NEW SESSION	<p>In the current political climate, when “they” are after us all, its time to work together. In this session, participants will learn and practice how to use the Interest-Based process to level the playing field, solve problems and meet member interests.</p>
507	<p><i>Winning With Words</i> <i>Presenter(s) Larry Spotts, Katherine Clarke</i></p>
607	<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>
508	<p><i>Show Them the Money: Budget Analysis for the Modern Union</i> <i>Presenter(s) Andrea Hardy</i></p>
608	<p>Does your employer cry poor every time you come to the table to bargain? Are you after better compensation or staffing levels, but they insist they have no money? 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 how to educate yourself, analyze their data, use their data to make your point, and demystify the data for your members.</p>
509	<p><i>The Affordable Care Act</i> <i>Presenter(s) Daniel Gottheimer</i></p>
609	<p>This session will review the short comings of the American Health Care System and the role the Affordable Care Act plays. Course work will include an explanation of the Affordable Care Act, the fight to save it, updates, sample contract language for staff contracts that you should have and an update on potential legislative changes. Topics will include, but not limited to: the excise tax, patient protections, and rights afforded employees in the workplace, employer responsibilities and tax changes</p>

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As NSO members continue to face attacks on their wages, hours, and terms and conditions of employment, including retirement, pension benefits and health insurance, they will need to continue to stand up for their rights and not give up the fight! The NSO Winter Advocacy Retreat has been expanded to three days to provide advocates with the information and skills to lead, promote, secure and defend the hard-earned rights of its affiliates and members.

The 2019 NSO Winter Advocacy Retreat is the time to gain knowledge and enhance your skills necessary to endure the many attacks that are launched against your members. Please join us for this great experience where you'll have the opportunity to network, learn, participate and have fun doing it.

Winter Advocacy Retreat-At-A-Glance

(Schedule is subject to change without advanced notice)

WEDNESDAY, January 16, 2019

1:00-5:00 p.m.	Early Registration
3:30-4:00p.m.-	New Attendee Orientation
4:15-4:45 p.m.	Trainers Meeting

THURSDAY, January 17, 2019

7:00-10:00 a.m.	Registration
7:00-8:30 a.m.	Continental Breakfast
9:00-11:30 a.m.	Session Series 100
11:30 a.m.-1:00 p.m.	Lunch (on your own)
1:00-3:30 p.m.	Session Series 200
1:00-5:00 p.m.	Registration
4:00-4:30 p.m.	Trainers Meeting
4:00-5:30 p.m.	Emerging Issues

FRIDAY, January 18, 2019

7:00-8:30 a.m.	Continental Breakfast
7:30-10:00 a.m.	Registration
8:15-8:45 a.m.	General Session
9:00-11:30 a.m.	Session Series 300
11:30 a.m.-1:00 p.m.	Lunch (on your own)
1:00-3:30 p.m.	Session Series 400
4:00-4:30 p.m.	Trainers Meeting
5:00-6:30 p.m.	Solidarity Reception

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SATURDAY, January 19, 2019

7:00-9:00 a.m.	Continental Breakfast
8:30-11:00 a.m.	Session Series 500
11:00-11:30 a.m.	Break (refreshments provided)
11:30-2:00 p.m.	Session Series 600
2:00 p.m.	Adjournment

Below are event highlights and important information:

Winter Advocacy Retreat Registration: All participants and guests **must** register online at <http://www.cvent.com/d/lgqh3r/4W?ct=533313c3-2a5c-482a-9a75-ad0abd9dc1f6>

The deadline for registration is **November 16, 2018**.

If you have any questions regarding registration, please contact NSO Secretary, Dawn Basurto at dawnbasurto@gmail.com.

Review the [session descriptions](#) and the [Winter Advocacy Program Grid](#) to make your selections.

NSO wishes to have all participants attend their sessions of choice, so please register early since many sessions have limited seating.

Hotel Reservations: Hyatt Regency Orange County, Garden Grove. Participants will be required to make their own room reservations online at <https://resweb.passkey.com/go/NSO2019> by December 21, 2018. A credit card will be required to reserve a room.

The valid room rates for the Winter Advocacy Retreat is \$ 189 single or Double Occupancy. If you experience any problems with your room reservation(s), please contact the hotel's Reservation Help Line at 714-750-1234.

Solidarity Reception: For the purpose of solidarity and networking, NSO and ORG will host a reception on Friday, January 18, 2019 from 5:00-6:30 p.m. Afterwards, attendees will be free to enjoy Orange County on their own. Cash bar and hors d'oeuvres will be available for your enjoyment. **NSO Disaster Relief Prizes will be raffled, but you must be present to win!**



Orange County Activities:

Discover magic, adventure, recreation and relaxation in our Hyatt Regency hotel located only minutes from the [Disneyland® Resort](#). Just a short drive away, you'll find tons of things to do in Anaheim, CA, like playing on [beautiful beaches](#), exploring [adventure parks](#), [shopping outlets](#) and [professional sports games](#). Let our experienced Concierge point you in the right direction for all the best attractions and activities near Disneyland®. Stick to your workout routine in our [24-hour StayFit™ Gym](#) with state-of-the-art Life Fitness® cardio and strength machines, resistance bands, and mats, or get centered with our YogaAway™ program in your room. After a day of adventure, relax in our [two outdoor heated pools](#) and indulge in a peaceful soak in the hot tub. Gather up family and friends for a game of basketball or a tennis match on our [sport courts](#), or relax by the glow of the [fire pit](#).

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Ground Transportation:

Taxi: Taxi service is available at the hotel. Rates may vary. Some taxi cabs accept credit cards. If you prefer to pay for a taxi cab with a credit card, make sure you tell this to the dispatchers at the transportation podium. They will request a cab that is equipped with a credit card machine.

Yellow Cab: <http://www.yellowcab.com/> (714) 999-9999

John Wayne/Orange County Airport (SNA)

Distance: 13 miles

Super Shuttle: \$11 per person/one way

Los Angeles International Airport (LAX)

Distance: 35 miles

Long Beach Airport (LGB)

Distance: 18 miles

Super Shuttle: <http://www.supershuttle.com/Locations/OrangeCountySNA>