

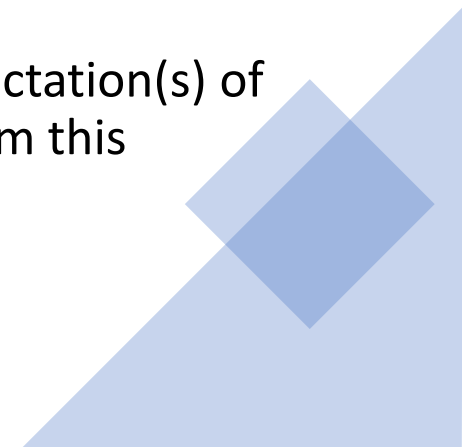


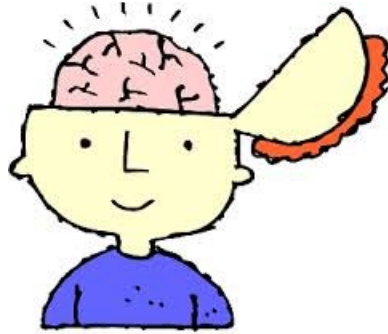
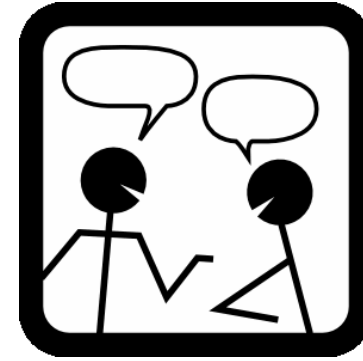
New Local Presidents' Conference

Welcome to the Tarrytown
Regional Office



WELCOME! And DO NOW!

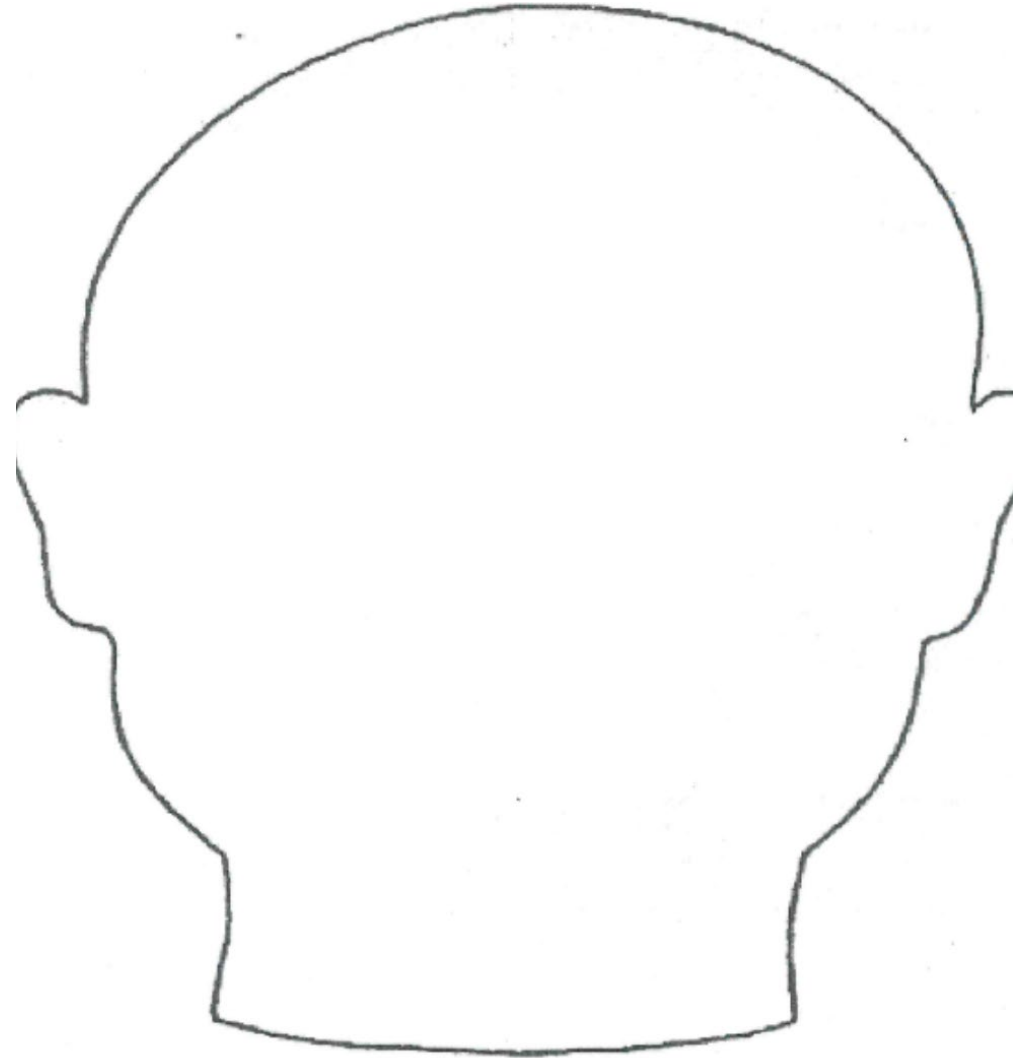
- Introduce yourself to your tablemates...
 - On a scale of 1 (lowest) to 5 (highest), where do you rate:
 - Your relationship with your Superintendent?
 - Your relationship with your executive board?
 - Your relationship with your membership?
 - The level of engagement of your membership with your local?
 - Share with your tablemates your response to the following question:
 - What are your members' expectation(s) of you after you return home from this conference?
- 



Need to Knows..

ADULT LEARNER PERSPECTIVES OPEN MIND SHOUT OUT!

- Using the Open Mind graphic organizer, jot down what is important to you as an adult learner.
- Share personal adult learning preferences with tablemates.
- Be ready to “Shout Out” your thoughts.



Succeeding with Adult Learners

1

Understanding the difference in adult learners

2

Catering to all types of learners' needs

3

Providing a result-oriented session

4

Using rubrics to maximize learning success

5

Approaching presentations from a professional perspective

Understanding the Differences in Adult Learners

- Adult Learners:
 - Approach life from different perspectives
 - Are motivated in different ways
 - Come to class with different attitudes
 - Absorb information in different ways

ACTIVITY

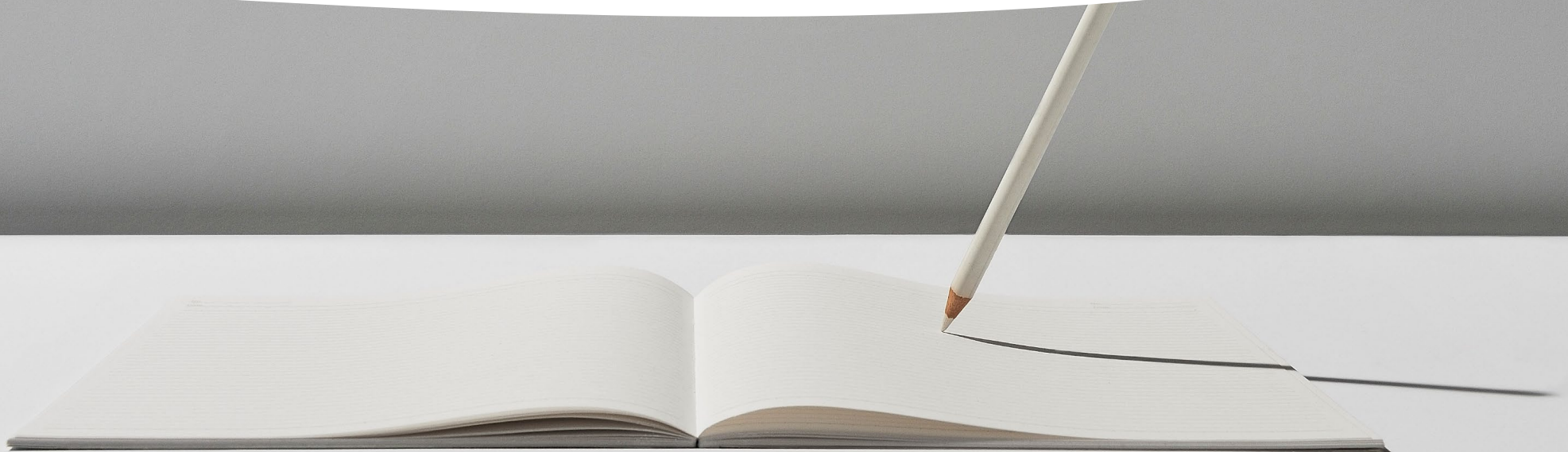
Adult Learners

Perspective

Identification

Directions

- Take the inventory
- Put down your first impression
- Total all odd numbers and all even numbers



ACTIVITY

Happy Face (Do/Don't) Chart

Directions

- Get into groups: “single”, “Balanced”, or “Holistic.”
- Given your perspective....
 - What is essential to your learning?
 - What drives you crazy?
- Give advice to your trainer and your LRS.

Perspectives Review

Single Task Learners



Holistic Learners



How does your learning style match your leadership style?? Does it?

ACTIVITY

- [Wordsplash](#) : Using your phone, enter 5 words that you associate with the word....

- Union President
- Leadership



Let's look at your leadership style..

Enter you answer to the following question:

I ran for president because:

- Someone asked me
- I didn't run, it was part of succession planning
- No way was incumbent getting another term
- Was nominated and accepted
- No one else wanted it
- Part of a larger plan to change the executive leadership of local

You should have the following link in your email. Take a minute to take the test.

- [Leadership test](#)
- Find the Leadership article in your binder. Take a minute to review your style.



Perspectives Review

Learners



Leaders



What are the responsibilities of a leader?

Responsibility of new leader

1. Understand Your Mission

2. Analyze Risks

3. Identify Power Players

4. Review Your Organization

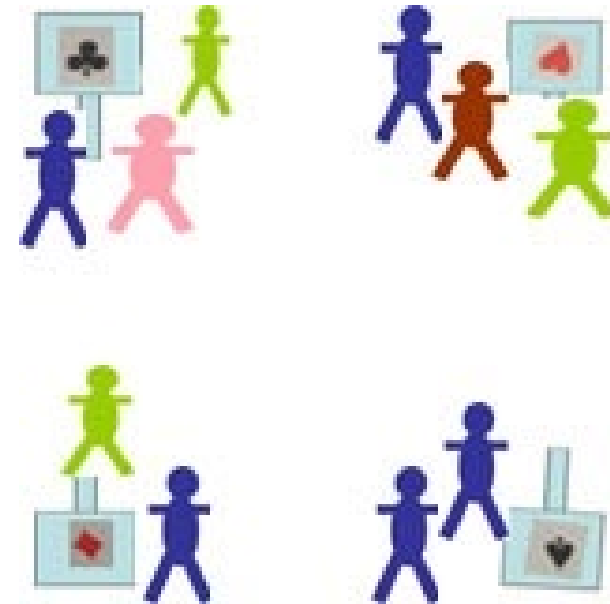
5. Audit Internal Systems

6. Challenge Your Findings

7. Stay Curious

Four Corners - Activity

- Posted in each corner of the room is a paper with 1 leadership responsibility listed.
- After reading each one, please go to the corner of the responsibility you feel is the most important/difficult for you.
- Discuss with the others at the same responsibility why they chose it.
- Be ready to report out.





Questions?

A photograph of a campfire on a beach at sunset. The fire is made of sticks and is burning brightly. The beach is sandy with footprints, and the ocean is in the background with waves. The sky is a mix of orange, pink, and blue.

Reflection

- Grab a dragon and bring to the campfire
- What is 1 item you learned about yourself as a learner and 1 thing as a leader that surprised you.
- +/- ?? On way out for a break??



Revising your Union's Constitution & By-laws

Tarrytown Regional Office

New York State United Teachers



- These documents – the union constitution and its by-laws – define the principles and rules that govern the local union and establish the rights and responsibilities of union membership.

Why Revise the Union's Documents?

It may be necessary to periodically update the union's constitution and by-laws to reflect:

- mandates from affiliate partners
- membership categories
- new titles added to the unit
- updated laws and regulations
- local response to law/regulation
- philosophy of leadership
- issues faced by the local that have caused concern

What's the Difference?

Constitution

- The Constitution is the policy document. It should be separated into articles that cover the broad principles of the governance of your local.

By-laws

- By-laws should cover the interpretation and regulation of the policies established in your constitution.
- Under Roberts Rules of Order, by-law changes can be made without a full constitutional amendment provided the by-law is a true interpretation of the article.

The Constitution addresses the following:

- The name of your local
- The purpose/mission
- Affiliations
- Membership
- Officers and their duties
- Nominations and elections
- Governing Body of the membership and its duties
- Standing committees and chairpersons
- Delegates to NYSUT and other affiliates
- Stipend Positions
- Chapters/Officers
- Protection of rights of members
- Ratification of collective bargaining agreements
- Amendments
- Parliamentary Authority

The by-laws should cover:

Dues

Stipend Rates

General
Membership
Meetings / Number,
Notice & Quorum

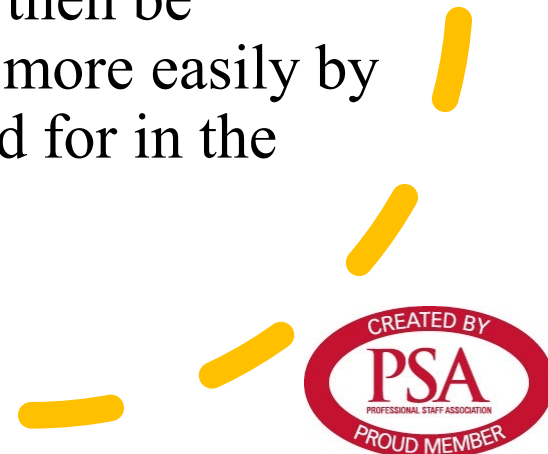
Election procedures

Contract Ratification
Procedures

One More Thing...

Procedures & Policies

- Internal policies and various procedures (e.g., details of election process, payment of stipends, reimbursements, etc.) will facilitate a smooth running local.
- Such policies and procedures should be more fluid and changeable than a local's constitution or even its by-laws.
- Therefore, keeping these systems in a Procedures or Policies Manual is advised. These can then be amended to meet changing conditions more easily by the Executive Board (if this is provided for in the Constitution).



Local, State, & National Affiliates

Your local union is affiliated with NYSUT (New York State United Teachers), AFT (American Federation of Teachers) and the NEA (National Education Association).

Because of these affiliations, your union is required to follow ALL of the requirements of the state and national affiliates.

But it is important to remember that your union's desires and needs must factor into the changes that are made to your documents.

NYSUT Requirements

- Unified Membership with NYSUT and national affiliations;
- Adhere to the requirements of national affiliates;
- Mandates that the local has a “no discrimination” statement in their constitution;
- Mandates that a local will transmit dues in a timely manner;
- Mandates that a local will submit their constitution/bylaws to NYSUT;
- Mandates that the constitution will contain election policy, establishment of dues and protections of their members.

AFT Requirements

- Mandates that no constitution or by-laws can conflict with the constitution of the American Federation of Teachers;
- Mandates language that allows for the “pass through” of dues increases to the affiliates;
- Mandates that each local maintain affiliation with its AFL-CIO state and local labor council;
- Mandates that a local will submit their constitution/by-laws to the AFT;
- Mandates that the constitution provides for regular meetings of an executive board and regular meetings of the general membership;
- Mandates that elections conducted are consistent with the standards developed under Title IV of the Labor-Management Reporting and Disclosure Act (LMRDA- Landrum-Griffin) of 1959, as amended.

NEA Requirements

- Mandates due process be included in the by-laws required for any censure, suspension or expulsion of a member from the local;
- Mandates each local shall conduct elections with open nominations, and a secret ballot under the one-person-one-vote principle.

Language Matters



Keep an eye out for clauses in your collective bargaining agreement that might impact your revisions. Check especially the following:



RECOGNITION CLAUSE



LABOR-MANAGEMENT
MEETINGS



UNION RIGHTS

Membership

Opportunities & Possibilities:

- Define “Member in Good Standing”
- Address membership drops and re-entry
- Provide for members on unpaid leave of absence status
- Establish retiree groups
- Tie local union benefits in retirement to length of union membership



Elections: How & Who

Who must be
elected and how?

- All officers including any member of the Executive Board.
- Any delegate who votes for officers of a national or intermediate body.
- Officers must be elected directly by secret ballot of the members in good standing.

Elections must be held at least every three years.

Election Process:

Election
Committee
Notice of
Election
Nominations
Election

- All members in good standing must be given a reasonable opportunity to nominate candidates of their choice.
- There must be a notice of elections that includes the date, time, place and procedure for nominations. Notice of elections should be mailed to the last known home address of all members
- Every member in good standing is eligible subject to “reasonable qualifications” established in the Union’s Constitution and By-laws that are uniformly imposed. This can include a membership qualification not to exceed two years.

What are your next steps??

We've got work to do!





KNOW YOUR CONTRACT

As a Union Leader you should actually read
your contract. Most members won't!

What Does the CBA Provide?

I am a substitute or part-time worker. Am I entitled to health insurance?

I applied to fill a vacancy in my tenure/certification/work area but did not get the position. Have my rights been violated?

T/F? I have the right to attach my comments to an evaluation report.

A community member sent a letter of complaint to my supervisor. Can the supervisor place that letter in my personnel file without my knowledge?

The Employer posted that starting September 1 the workday will be 15 minutes longer than this year. Can we file a Grievance?

Before I started working here I did the same type of job in the City of New York for 15 years. All my experience is verifiable. Is my employer obligated to give me any salary credit for my prior experience?

What Does the CBA Provide?

Whew! I made it! This is my 30th year of working for our Employer. I earn \$45,316. Am I entitled to any other compensation?

Can I call in sick or use personal days in June to finish up on some last-minute shopping for my summer vacation plans?

My co-worker isn't being paid properly according to our contract. Can I file a grievance for her?

For the last two years I was incorrectly given a longevity stipend that I am not entitled to receive. Not one to complain when I am given a gift, I reported this to no one. Now the District wants to recoup the overpayment. Can I file a grievance about the reduction in my salary?



Who do you represent?

Who don't you
represent?




Duty of Fair Representation

A large orange circle on the left side of the slide, partially cut off by the edge.

Obligations to members AND nonmembers

Amendments to the Taylor Law continue to require the union to enforce provisions of the collective bargaining agreement without regard to the employee's membership status in the union.

However, the union may now exclude non-members from receiving services and benefits that do not flow from the collective bargaining agreement.

A series of four yellow dashed line segments in the bottom right corner, arranged in a curved, upward-pointing path.

Services that may be limited

Representation for matters
covered by Education
Law/Commissioner's
Regulations:

- Section 3020-a (discipline of tenured teachers)
- Section 913 – Medical Examinations
- Sections 3019-a/3031 – notice of termination
- Section 2510/3013 – Layoff and Recall
- Part 83 – Moral Character Complaints/Revocation of Certification

Representation in matters
covered by Civil Service
Law:

- Section 75 – discipline and discharge
- Sections 71 – 73 – leaves related to ordinary disability and work-related disability
- Section 80 – layoff and recall

Advocacy Relating to other laws, regulations and agencies:

- Unemployment Insurance hearings
- FLSA/Wage and Hour compliance
- Retirement system advocacy
- Workers' Compensation Claims
- Disability Claims
- NYS Division of Human Rights/ EEOC Claims
- Enforcement of FMLA and ADA rights

- **PLEASE NOTE:** if there is any provision in the collective bargaining agreement that speaks to these rights then they may convert to a contractual provision requiring union representation without regard to union membership. This is particularly important for determining what support is required during investigations of employees, “Weingarten rights” meetings and other meetings with management.

Advice to local leaders:

- The impact of this change on your local will depend on the language of your collective bargaining agreement.
- Carefully review your collective bargaining agreement language with your LRS to determine what level of service is required for non-members.
- Carefully review the Grievance Procedure. Be sure to focus on the definitions and rules that define a grievance, state who can grieve and how a grievance is advanced to arbitration.
- DO NOT rush to negotiate rights out of your agreement – eliminating important, hard-won provisions will hurt members and will ultimately reduce the value of the collective bargaining agreement.
- Work with your LRS to determine ways to address ambiguous, broad or conflicting language.
- Work with your LRS to review your local constitution in order to clarify and/or create a clear policy regarding what local services will be provided to non-members.



Duty of Fair Representation

- Although the obligation under the DFR standard is reviewed on a case-by-case basis, a breach of the DFR standard typically requires showing that the union's actions were deliberately invidious, arbitrary, or founded in bad faith.
- Generally, irresponsible or grossly negligent mistakes, carelessness, ineptness or ineffectiveness are not sufficient to prove a DFR against a local Association.



DFR as it pertains to representation

- The DFR extends to non-members because of the exclusivity of your union to represent all employees in the bargaining unit.
- What activities must be provided:
 - Enforcement of the contract.
 - Negotiation of the contract.
- Who must comply with DFR?
 - Union officers, building reps, and anyone affiliated with a union position.

A stylized sun graphic on the left side of the slide. It features a solid yellow circle at the bottom left, with several short, curved yellow lines above it representing sunbeams. The background is split into an orange upper half and a white lower half, separated by a curved line.

Most common “DFR’s” deal
with grievances...for both
members and nonmembers.

There are generally 3 types of DFR claims related to Grievances:

That the Union failed to process a Grievance or did so incompetently.

That the Union acted inappropriately to protect one member over another where there is a conflict between two (or more) members.

Non-union members who claim that the Union failed to process their Grievances or did so incompetently.

To avoid a DFR, the Union must do the following:

Consider all Grievances solely on the merits presented.

Investigate the Grievance thoroughly.

Process the Grievance promptly – do not miss time limits for filing and advancing the Grievance.

Take notes and keep written records.

Keep the Grievant informed.

Treat all members of the bargaining unit the same. This includes union members and non-members.

Have a valid reason for any action taken on a Grievance.

If the Grievance clearly lacks merit and cannot be won at the lower stages, or in arbitration, drop it.

The settlement of Grievances.

Establish an internal appeals procedure.



Dues deduction

Changes relating to payroll deduction of union dues include:

1. Remittance of payroll deduction funds no later than thirty days from when the employee submits the authorization form.
2. The employer must honor any “opt out window” incorporated in the language of the authorization form.
3. Payroll deduction forms can be in any format approved by NYS Technology law including authorization submitted through MiniVan or other digital means.
4. Automatic reauthorization of payroll dues deduction when an employee returns from an approved leave of absence.
5. Automatic reauthorization of payroll dues deduction when a laid off employee is returned to his/her position within one year of the layoff.

Dues Deductions...Advice

Complete	Complete your ongoing re-enrollment campaign using the approved NYSUT card.
Discuss	Discuss these technical changes with your employer and identify any areas of potential conflict or disagreement.
Monitor	Closely monitor your employer's actions concerning payroll deduction of dues.
Discuss	Discuss what language in the existing contract needs to be amended, modified and/or adjusted with your LRS.

Labor-Management Meetings

- the only formal means of communication between labor and management is the contractual grievance procedure and contract negotiations.
- The labor-management committee is not a substitute for the grievance procedure or contract negotiations.
- the labor-management committee can develop into a significant factor in improving the labor relations climate in organizations.



Health and Safety

- **SEC. 5. Duties**
654

29 USC

- (a) Each employer --
 - (1) shall furnish to each of his employees employment and a place of employment which are free from recognized hazards that are causing or are likely to cause death or serious physical harm to his employees;
 - (2) shall comply with occupational safety and health standards promulgated under this Act.
- (b) Each employee shall comply with occupational safety and health standards and all rules, regulations, and orders issued pursuant to this Act which are applicable to his own actions and conduct.

- US DOL OSHA Act of 1970

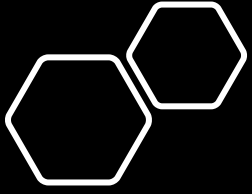
Health and Safety

- [NYSED.gov website](https://www.nysed.gov).
 - May not have the most up to date but still use as a reference
- [How to organize your health and safety committee](#)
 - Required for all public schools under NYS law
 - Prevent and address environmental health concerns
 - Cross-agency team, with union participation required
 - Many benefits for students and staff



Ending Reflection Circle

- Grab a penny and join the Knights of the Round Table at the campfire
- Sharing – What is one thing from today's session that you would like to take back and use in the next week.
- Activity: Pass the dragon
- Farewells: Always be yourself, unless you can be a dragon!



Plus/Delta

Please leave feedback by the
castle door...

You don't have to slay a dragon to be
perceived a hero - smiling at someone
at the right moment might also do the
trick.

~ Jury Nel



Leadership

Part 2

Creating a healthy leadership team



Day 1

Who are you as a learner and a leader?

- Assessed confidence and self-awareness
- Communication
- Honesty
- Identified strengths and weaknesses in your leadership responsibilities

What are the responsibilities of a leader?

Responsibility of new leader

1. Understand Your Mission

2. Analyze Risks

3. Identify Power Players

4. Review Your Organization

5. Audit Internal Systems

6. Challenge Your Findings

7. Stay Curious

**Members AND your leadership team
need to learn who you are and how
you will operate as a leader in your
role.**



Novices and Experts



Think about your current job...

- How did you feel when you were a novice just learning that skill?
- How did you feel after you mastered that skill?
- How did you move from novice to expert?





NOVICES

- Work with isolated bits of information
- Go “by the book”; are mechanical
- Complete task step-by-step
- Are unsure, need support
- Can do it as long as everything goes right

EXPERTS

- See the “big picture”
- Recognize patterns
- Experiment; innovate; are interpretive, artistic
- Integrate elements smoothly
- Are confident, independent
- Make on-the-spot adjustments
- Are able to work their way out of difficulties (use fix-up strategies)



Learning

is the process by which a novice becomes an expert in a particular domain.

Learning

occurs primarily through opportunities to make connections to prior knowledge and experiences.



...the distance
between the actual
developmental level
and the level of
potential development
under guidance...

Vygotsky - 1978

NOVICE

Current
level of
knowledge

**ZONE
OF
PROXIMAL
DEVELOPMENT**

EXPERT

Needed
expertise
to
achieve
goal

The *zone* is the area within which the student cannot proceed alone, but can proceed when guided by a teacher or an “expert peer.”

Rosenshine & Meister, 1992

NOVICE

Current
level of
knowledge

**ZONE
OF
PROXIMAL
DEVELOPMENT**

EXPERT

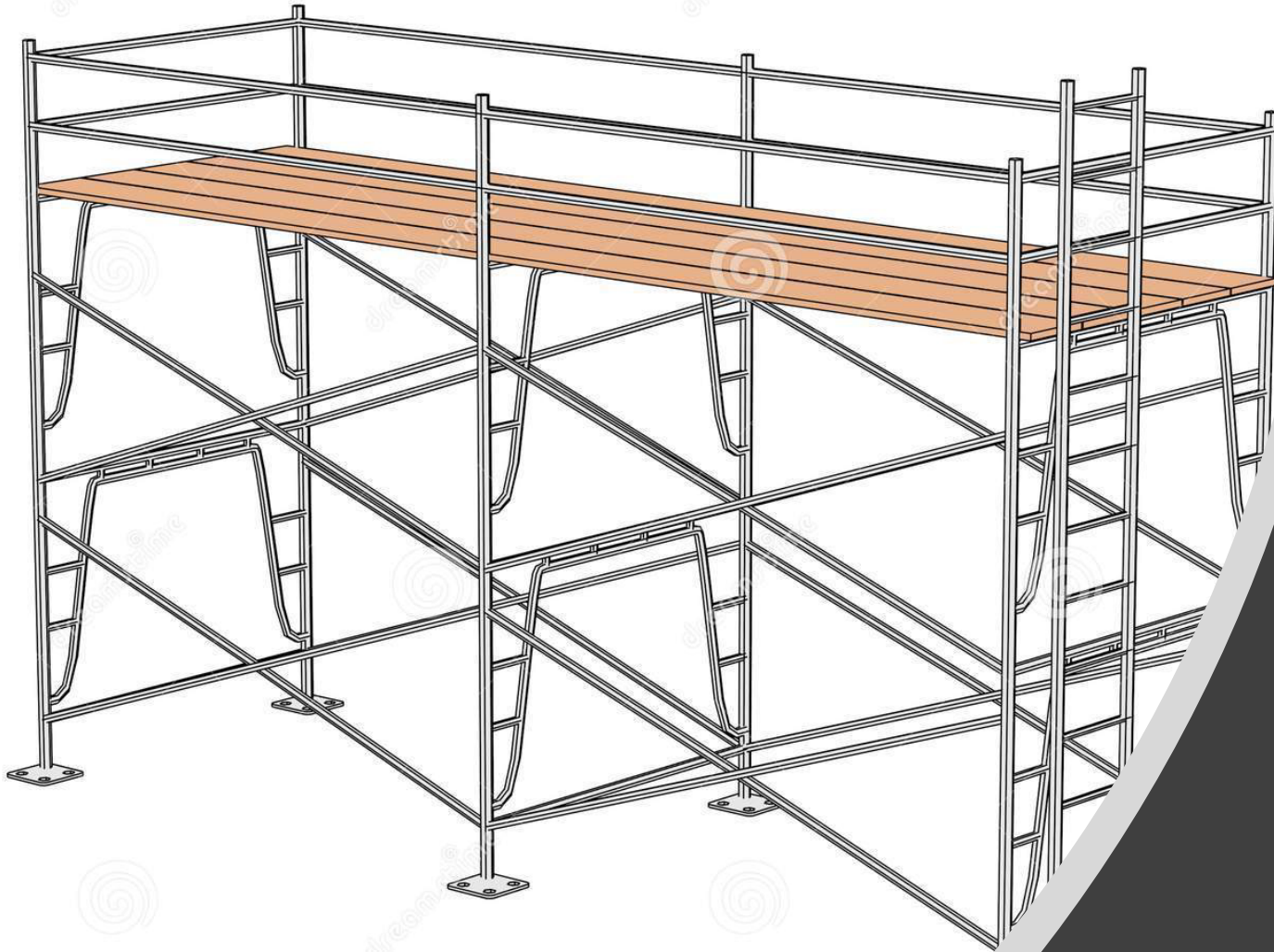
Needed
expertise
to
achieve
goal

How will you bridge your “gap”?





Scaffolding



What does it mean to scaffold student (team member) learning?

Learning Task Continuum



Well-Structured

Fixed sequence of sub-tasks that consistently lead to the same goal or answer

*Low-level
thinking skills*

Less-Structured

Require combining and applying various elements of knowledge and skill in new ways

*Higher-order
thinking skills*



**WELL-STRUCTURED
TASKS**

**LESS-STRUCTURED
TASKS**

**Table Talk: What are some of exec board,
president or committee tasks and where would
they fall?**

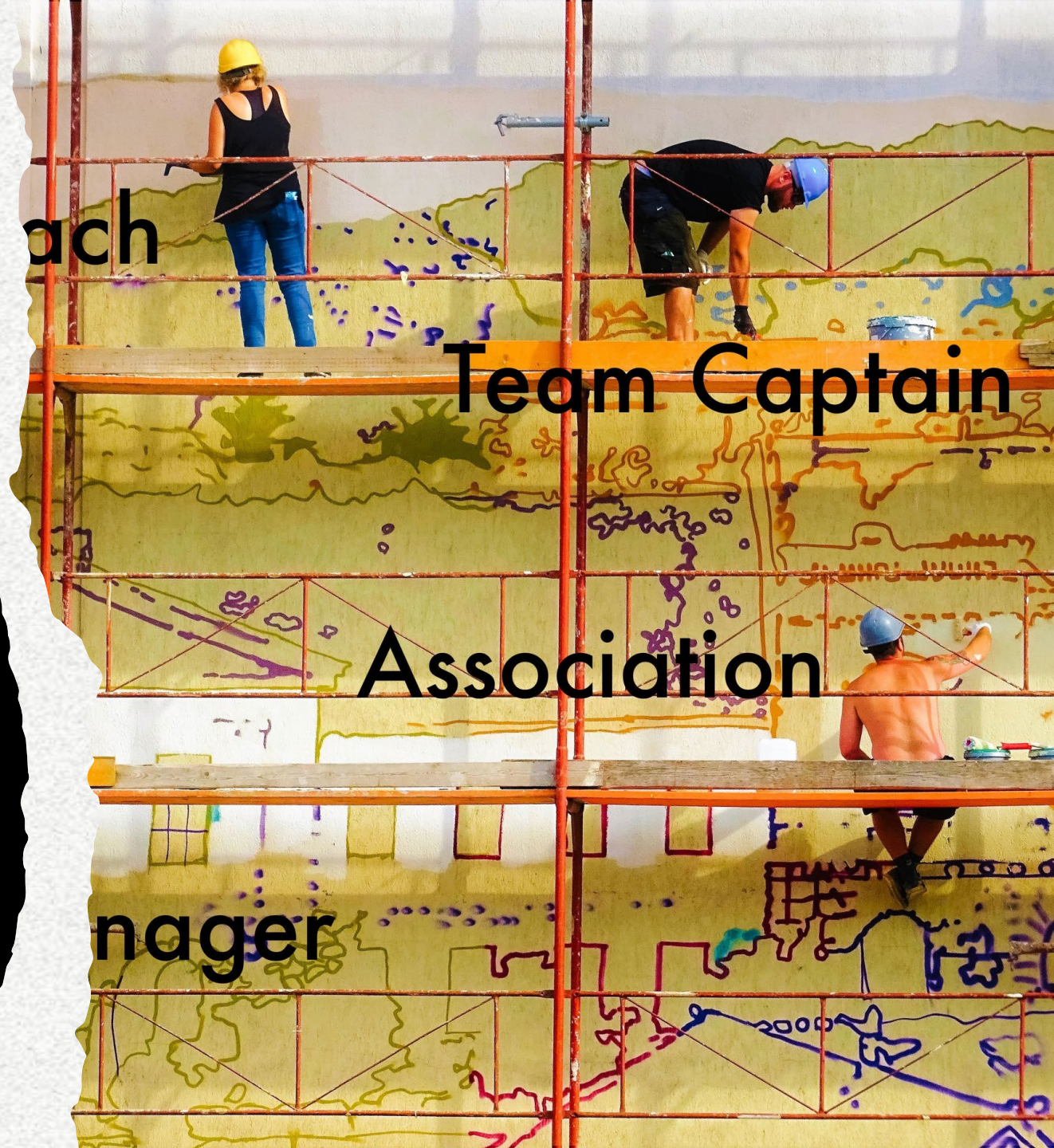
Scaffolding

- What is the purpose of a scaffold?
- What would happen if workers tried to build this cathedral without scaffolding?
- How does scaffolding relate to you and your executive team?



How will your scaffold
your leadership team?

- [Rookie mistakes leaders make](#)
- What is a Team?





Team Carousel

- Find the article “[What is a Team?](#)” in the leadership section
- Take 5-10 minutes to read/scan:
 - Define team
 - Define group
 - Similarities of teams and groups
 - Differences between teams and groups
- Count off in 4's
- Groups into each corner – confer and post
- 3 minutes in each corner
- Review

Comparisons

Similarities

Two or more than two persons.

Interaction of members.

Face to face relationship.

Focus on the achievement of an objective.

Leader

Sharing of information and resources

Differences

- There is only one head in a group. A team can have more than one head.
- The group members do not share responsibility, but team members share the responsibility.
- The group focuses on achieving the individual goals. Conversely, the team members focus on achieving the team goals.
- The group produces individual work products. As opposed to, the team who produces collective work products.
- The process of a group is to discuss the problem, then decide and finally delegate the tasks to individual members. On the other hand, a team discusses the problem, then decide the way of solving it and finally do it collectively.
- The group members are independent. Unlike a group, the team members are interdependent.

Teams vs Groups...

Team

plays a very vital role in the life of the members

motivates the members for working creatively and actively participating in the team tasks.

stimulates the members to work for/with one another in achieving an objective.

Group

helps the members in developing a sense of conformity between the members and respect the group values.

increases their resistance to change.

the power of a group is always more than an individual

Building an Effective Team

- Bruce W. Tuckman's work can be explained using the graphic found in your binder.
- Setting boundaries



You have the “Team”

- We will focus on the Executive team – which are your elected or appointed members
- They come to the table with different motivations.





Motivation Pantomime

Directions:

- Choose a motivating card. Group by like terms
- Take 5 minutes to design a pantomime for your motivator. Everyone participates!!
- Present to the large group. Large group will “guess” your group’s motivator.

Review
leadership
team,
leadership,
next steps...

- Need constitution
- Green delegation of duties
- Take 5 minutes...review your constitution/contract and write down
 - leadership vacancies you have
 - committee vacancies you have
- Stand/sit activity

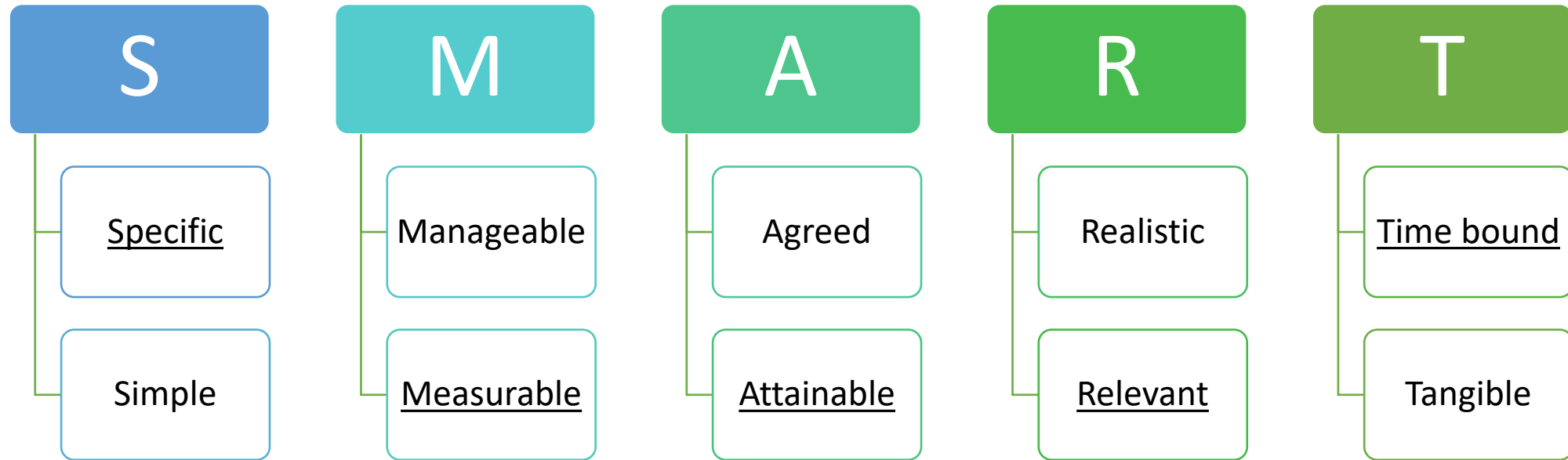
Picking your team using “BALM”

You are a new leadership team. Every committee chair from the previous leadership team has resigned. As a group, using the constitution at your table:

1. Select the top 4 committees that need chairs and members appointed ASAP
2. **B**reak down the broader goals of that committee into specific, individual tasks, and then rank each task in terms of importance.
3. **A**nalyze and list the competencies required to perform each task.
4. **L**ist the competencies of each potential team member (see folder)
5. **M**atch individuals to task competencies

Post on wall.

Goal-Setting...





Committees

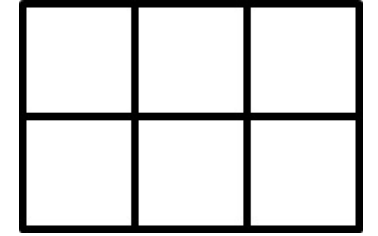
- Group or team?
- How will you select members?
- I know....nobody wants to join.



Committees

- Regroup by age groups identified around the room.
- Take 5 minutes generating a list of life focus and personal needs that might influence your involvement in union work.
- Go back to your “Pooh Corners” team.
 - Think about your team members from a generational perspective.
 - Review the goals created.
 - Are they SMART goals?
 - How could different generations be on the team to achieve these goals. (ZOOM is not the answer).

Give One Get One



Directions:

- Fold your paper into 6 squares
- Pick three squares and in each one write down one “a-ha” or take-away from today’s session.
- When music stops, partner up with person closest to you and share one of your squares. If you don’t already have that take-away write it down in one of your blank spaces. Repeat 2 more times.





Plus/Delta

- Please leave feedback by the castle door...

“Never judge another knight without first knowing the strength and cunning of the dragons he fights.”

Summary and tomorrow....