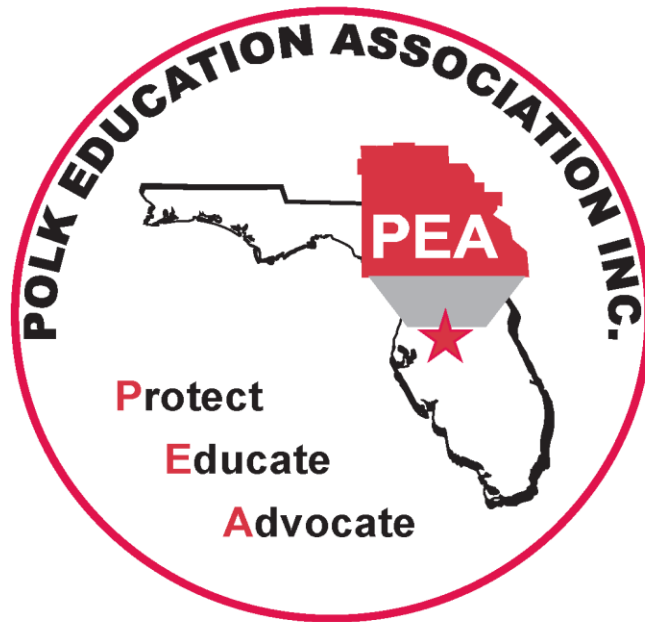




Contract Steward Handbook

The right of employees, by and through a labor organization, to bargain collectively shall not be denied or abridged.

— Article I, Section 6 of the Florida Constitution

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CONTRACT STEWARDS

Contract Stewards (previously known as “Reps”) are the key to strengthening member rights and articulating employees’ views. Stewards provide the link between elected union leadership and supporters, bringing Our Union to the work site (or building/campus) level. Your job as a Steward is to make Our Union’s presence felt, field questions, build membership and involvement, and give voice to members’ and potential members’ concerns. Building a team of active Contract Stewards is the best way to strengthen our collective voice and negotiating power, and it also spreads around the difficult labor of running an effective local union.

Being a Contract Steward means being a leader!

- **You** represent the members at your worksite on a day-to-day basis.
- **You** monitor the collective bargaining agreement, solve problems, and work to ensure safe working conditions.
- **Your** vigilance protects members from abuse while your leadership organizes members, involves them in Union activities and programs, and builds **Your Union**.
- **You** provide a direct line of communication between members and union leadership at the local, state, and national levels.
- **You** strengthen **Your Union** by recruiting, retaining, organizing and mobilizing members.



As a Steward, **YOU are the key to overcoming:**

- Isolation and indifference.
- Fear and sense of futility about the future.
- Lack of true understanding about our union and the power of getting together and taking collective action.

As the Contract Steward, you are part of an enormous professional community. Our local Union – the Polk Education Association (PEA) is affiliated with the Florida Education Association (FEA) – an organization that represents more than 250,000 instructional and educational staff personnel. At the national level, PEA is affiliated with the American Federation of Teachers (AFT), National Education Association (NEA), and the American Federation of Labor and Congress of Industrial Organization (AFL-CIO). These organizations provide benefits and services, congressional lobbying, and training opportunities for the state and local organizations.

Job Description

The Contract Steward is the face of our union at the work site. You must be a PEA member in good standing to be duly elected to represent your worksite. As the Contract Steward, you function as a **communicator** to ensure that two-way communication exists between the member and union leadership, an **advocate** to protect members’ rights and interests, and a **builder** to develop support for our union’s programs and create a strong union presence at the worksite.



Communicator



As a Communicator you ensure that accurate and effective two-way communication exists between the worksite and Union leadership.

Communicator Responsibilities:

- Ensures that the actions, programs, and services of Our Union and its affiliates are visible and accessible to members.
- Must attend monthly Governance Board (Steward) meetings (held on the 1st Thursday) or send a proxy, to represent their site, vote, and gather information.
- Regularly hold 10-minute monthly meetings on site with members (2nd week of each month), to keep members informed of current issues/developments and/or benefits of Our Union and its affiliates, and to establish open and consistent communication with members and potential members.
- Meet regularly (monthly) as an equal with worksite administration.
- Present a positive image of PEA and Our Union values.
- Introduce self to staff as the Contract Steward throughout the year – especially to new staff.
- Actively engage members (i.e., incentives, events, invite to member meeting).
- Speak at faculty/staff meetings, as appropriate.
- Maintain a PEA bulletin board at the worksite with relevant, accurate, and current information.



- Distribute PEA material in the most applicable manner (i.e., mailboxes, in-person, e-mail).
- Communicate with other Contract Stewards (including multiple Stewards at your worksite), Executive Board members, Service Unit Directors (SUD), and elected Leadership, as needed.
- Ensures that issues, concerns, opinions, and suggestions from the worksite are conveyed to our union leadership.
- Supports Union leadership requests for member input.
- Notifies Union leadership of significant challenges and successes at the worksite.
- Surveys membership frequently to understand the current concerns, opinions, and suggestions.



Advocate

As an Advocate you are the “eyes and ears” of our Union at the workplace ensuring that the health, welfare, and rights of members are protected by monitoring the implementation of the collective bargaining agreement, by advising and representing members, and being an advocate for the profession.

Advocate Responsibilities:

- Maintains a working knowledge of the collective bargaining agreements (contracts).
- Knows the grievance procedure.
- Understands Weingarten and other member rights and responsibilities.
- Preserves confidentiality of members' information!
- Takes detailed notes and maintains accurate and complete records.
- Informs our Union leadership of potential grievances and/or worksite problems and works collaboratively toward positive resolutions.
- Identifies member complaints and/or potential worksite problems that may require action.
- Investigates member concerns and/or worksite problems identifying all affected.
- Determines the merit of complaints and/or potential grievances.
- Appropriately represents members in meetings (grievance process and/or alternative problem-solving settings).



Builder

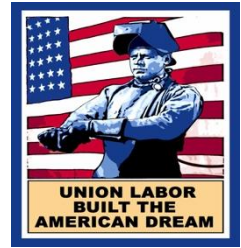
As a Builder, you establish a strong, visible, positive union presence at the worksite and build support for our union's programs by developing active member participation.

Builder Responsibilities:

- Assist potential members in joining Our Union.
- Review and update member list each month.
- Develop and maintain a plan for organizational and membership goals at your worksite.
- Educate members about Our Union's hierarchy and organizational chart.
- Wears union shirts/buttons/symbols weekly and encourage members to do so as well.
- Develop a sense of unity by identifying feelings, concerns and issues common to the membership.
- Organize and motivate members to work together to get things accomplished.
 - Recruit volunteers for union events and activities, such as:
 - Rallies
 - Phone banking
 - E-mail campaigns



- Encourage membership in union committees and training opportunities, such as:
 - Professional Development Committee
 - Government Relations Committee
- Involve members by sharing responsibilities that build our Union.
- Recognize and reward members for their union participation.
- Organize and participate in social events with members and potential members.



Contract Steward Tasks (examples)

- » Ongoing conversations with potential members about joining and taking a stand with their colleagues.



- » Coordinating the two-way communication, collection of information and surveys, as well as encouraging participation in collective bargaining negotiations or union events.
- » Welcoming new colleagues and encouraging them to join our union.
- » Bringing concerns about contract violations or issues from colleagues to the local leadership.
- » Serving as a source of information about our union and about the contract for a group of members.



- » Attending monthly Contract Steward meetings and functions and encouraging colleagues to do so as well.
- » Holding monthly member meetings (10-minute meeting).



Monthly 10-Minute Meetings

As a Communicator, the Contract Steward must hold monthly Union meetings to keep the members that elected them informed. The “10-Minute Meeting” is designed to quickly inform members of the status of our union and allow the Steward an opportunity to connect with members.

A few ideas to make the monthly meetings better include:



- Snacks!

When you host your worksite meeting (monthly 10-minute meeting), serve a little snack like cookies or chips and/or nuts. Snacks are always a sure way to bring in a crowd and make your meeting a big hit! Some local restaurants may donate food – also some of our affiliates (such as NTA) will provide snacks and door-prizes for members (with a short presentation).

- Schedule meetings well in advance and send reminders (use school email). You can schedule all meetings for the year (should be held during 1st or 2nd week of each month – after monthly Steward meeting).
- Always have information to share (meeting agenda and previous meeting minutes).
- Discuss Issues of Interest (i.e., contract, evaluations, paycheck).
- Email the meeting agenda to members a few days in advance.
- Have meetings after professional development.
- Have a “parking lot” for questions.
- Always have “Prizes” – swag giveaways; gift cards; etc.



Rights for Union Members

Most educators will go through their entire careers without facing disciplinary action. But it is still important to know and be familiar with your rights should you or your co-workers need to exercise them.

Being called into a meeting with your supervisor or an administrator can seem daunting. It's important to stay calm and remember your right to representation, also known as your “**Weingarten Rights**”:

1. **Remember:** If a reasonable person would believe that discipline could result from the meeting, you have the right to representation.
2. **Ask:** “What is the purpose of the meeting?” Could discipline result from the meeting? If so...
3. **State:** “I want union representation.” You can ask for representation at any time during the meeting.

Although it is unfortunate, it is a fact that the very nature of your job leaves you open to serious allegations of misconduct, ranging from inappropriate discipline to excessive use of force to sexual misconduct to misappropriation of funds to falsifying records and everything else in between.

While it is impossible to stop allegations from being made against you, there are steps that you can take to protect yourself, your reputation and your career. It is important to note that teachers are not the only employees in a school district who are open to allegations of misconduct. Bus drivers, teacher assistants, food service workers, custodians, secretaries and other educational staff professionals are just as likely to be charged as teachers. Since we represent teachers, paraeducators, and educational staff professionals, it is good to know this information. By following these simple tips, you can help protect yourself from allegations being made against you.

DO NOT be insubordinate if denied representation.

- Attend the meeting.
- Keep asking for union representation.
- Take good notes.

DO NOT sign or agree to anything.

DO NOT make or write statements or answer questions without steward.

CALL your local union office or service unit immediately for assistance.

BE PREPARED!
KNOW YOUR RIGHTS!



Best Practices for Avoiding Discipline



- Never touch a child in anger. Avoid any contact that can be perceived as grabbing, pushing, shoving, pinching, twisting or hitting.
- Avoid being alone with a student, particularly one of the opposite sex. Try to have another student or adult present. If this is not possible, be sure to leave the door open and, if at all possible, move to an open location such as a media center.
- Do not give a student a ride in your personal vehicle.
- Do not give gifts to students.
- Do not engage in conversations with students about their dates, romantic problems, or sex. If a student needs help, refer him or her to a guidance counselor.
- Avoid hugging students. If a student wants to hug you, try to do so standing side by side.
- Never drink alcohol in front of students or on a school-sponsored trip, even if students are not present.
- If you handle money, be sure to follow school and district policy regarding accounting, receipt and deposit procedures.
- Keep careful and accurate records. This includes student records, inventory records, financial records or any documentation for which you are responsible.
- Arrive at work on time or a few minutes early. Don't leave before the end of the workday without permission.



Do's and Don'ts when facing possible disciplinary action:

1. DO remain calm.	5. DON'T attend meetings without representation.
2. DO contact your local union office.	6. DO get preliminary details.
3. DO keep notes.	7. DON'T agree to a change in job status.
4. DON'T make statements.	8. DO keep documents/notes on the matter.

Steward Responsibilities during Weingarten Meetings

Building Reps have three key responsibilities during an investigatory interview:

- Provide assistance and counsel to the member.
- Request information from management about the incident in question.
- Serve as a witness and take detailed notes.

NOTE: If law enforcement or DCF are involved, call the office immediately (863) 533-0908. Members do not speak with law enforcement or DCF without an attorney present.

STEP 1: Talk with Management

When you arrive at an investigatory meeting, request to meet with management first. At a minimum, management has a legal obligation to give you information about the purpose of their investigation but use this opportunity to get as much information as you can. Try to get answers to the following:

- **WHAT** is management investigating?
- **WHY** is management having an investigatory meeting?
- **WHO** is management investigating?
- **WHEN** did the incident take place?
- **WHERE** did the incident take place?

STEP 2: Talk with the Worker Alone

Take a few minutes to talk privately with the worker. Find out what you can and encourage them to share everything they know with you; emphasize that you need to know the truth to best assist them. Give them the following advice to prepare for being questioned by management:

- Keep answers short. Answer the question and only the question. Do not offer additional information about questions that were not directly asked in the meeting. What you say can be used against you.
- Keep calm during the meeting.
- It's okay to take your time before answering management's questions.
- Remember that you're not alone. The union is standing with you.

STEP 3: Be Part of the Investigatory Meeting

During management's investigatory meeting, you cannot answer questions for the worker or tell them not to answer. However, you are not required to stay silent. Your primary responsibilities during the meeting are to:

- Ask clarifying questions. If management asks a complicated or "trick" question, ask for clarification (i.e., "Can you restate the question?")
- Prevent repeat questions. If management repeats the same question in a different way, point out that it has already been asked. As a steward you can say, "Asked and answered."
- Take good notes. Write down who says what in the interview to make sure that management does not give a false account of the interview when issuing discipline or responding to a grievance.
- Prevent abuse or harassment of the worker. You can put a stop to browbeating or object to demeaning statements.
- Call a recess if needed to allow time to calm down or if you need another minute to talk privately with the worker when new information comes up.

STEP 4: Witness any Discipline

In some cases, an investigatory interview will end with discipline. If so, make sure to ask management the following questions:

- What else do you plan to investigate?
- Why is discipline needed?
- How long will discipline last?



Only Union members get Union representation!

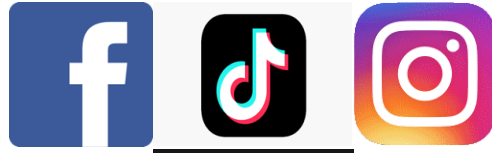


Contract Steward Code of Conduct

- I will uphold and enforce our union's Collective Bargaining Agreements.
- I will uphold union values of solidarity.
- I will not criticize any union colleague except to the individual directly.
- If any union colleague is being criticized in my presence, I will confront the criticism and ask that it stop.
- I will not participate in any conversations with management that criticize, or negatively speculate about, any union colleague or our union.
- I will settle my differences with colleagues within our union.
- I will engage in debate, offer others every opportunity for debate, and respect minority viewpoints, but I will observe and support the majority mandate of my union.
- I will avoid actions that undermine the bargaining and contractual rights of other unions in the workplace.
- I will qualify myself to vote in all local, state, and federal elections, if eligible to do so.
- I will adhere to our union's Bylaws, Policies, and this Steward Code of Conduct.



Social Media Guidelines



When using Social Media members should

1. Utilize the site's most secure privacy settings and check those settings often.
2. Use a profile picture you would be proud to see on a billboard in your community.
3. Use common sense when posting photos.
4. Only friend people who you actually know and consider to be a friend.
5. Never friend students.
6. Never friend the parents of students.
7. Never friend colleagues who are not your friend outside of work.
8. Never post comments or status updates related to your work—including general comments.

When government acts as an employer, the constraints of the [First Amendment](#) are less severe and must leave government free to impose reasonable restrictions on its employees in the interest of safe, efficient, and harmonious delivery of services to the public. See [Pickering v. Board of Education, 391 U.S. 563, 568](#) (1968).

The question whether school employees can be disciplined or discharged because of their off-duty speech posted on social networking sites such as Facebook, TikTok, or YouTube depends on the answer to three questions:

- 1.) What did the employee say on their blog or webpage?
- 2.) Does the employee have tenure or some other right not to be fired except for “just cause?”
- 3.) Is there a collective bargaining agreement or employer policy that limits the authority of the school district to discipline employees for off-duty conduct?

Members need to be fully apprised of school board policies which may attempt to govern off-duty conduct.

Gripe vs. Grievance



What are they? The grievance procedure is designed as a process to constructively resolve disputes and questions regarding contract interpretation. However, in general terms, a grievance is defined as: a claim by member(s) that there has been an alleged violation, misinterpretation or misapplication of a specific article or section of the contract. In short, a grievance is a problem-solving device. It allows for a constructive and orderly resolution to contract disputes.

Generally, any person who is in a position covered by the bargaining unit may file a grievance. Grievances cannot be filed by one member against another member. Though you may be asked to informally mediate interpersonal disputes (and you certainly may do so), they are not grievances unless they involve alleged violations of the contract by the administration.

First step is to determine if it is a gripe or grievance? **All grievances are gripes, but not all gripes are grievances!** Grievances address specific violations of contract language or contract practice. An important part of your job as an advocate for members is to know the difference when members bring their issues and concerns to you. In addition, you need to keep in mind that filing a grievance may not necessarily be the best first step to take.

Many situations can be resolved without filing grievances. The approach you take and the tone you use may determine how quickly a situation can be resolved or if resolution is possible without a grievance being filed. You may encounter members who feel that grieving is “unprofessional.” Others may feel that grieving is unnecessary because they can take care of themselves. Still others may feel that grievances could strain relationships between employees and administration. Keep in mind that your job as a member advocate is to make sure that the terms of the contract are upheld and that the terms and conditions of employment are applied equally to all in a fair and consistent manner. A grievance may be a necessary tool to ensure this.

Grievance Process:

1. Have member(s) share concerns with you as the Contract Steward.
2. Document member’s concerns. You can use the Grievance Fact Sheet (found in the back of his handbook). It is best to take notes on whatever concerns the member may have, even if it is not a grievance, the information could be useful at a later date.
3. Review the contract to determine if it is a gripe or grievance.
4. If it is a gripe, brainstorm potential solutions, including acting as a mediator in the situation.
5. If it is a grievance, have the member complete the Grievant’s Statement. Compare your notes to that of the member’s account and clarify any discrepancies.
6. If you need assistance or just want to clarify anything, contact a member of the Executive Board or your Service Unit Director.

Union Resources Summary

Your membership works for you in hundreds of ways. Here are just a few:

1. Contracts

From wages to working conditions, health insurance to promotions, nearly every part of our work lives is covered by the contract your union bargains with the school district. The bigger our union, the better the contract we can negotiate. **Current Contracts:**

Teacher: https://www.polkea.com/_files/ugd/37eee3_194f971951a44e038ece0b8672ad2269.pdf

Paraeducator: https://www.polkea.com/_files/ugd/37eee3_8bc9f02a94174a11bccfe4532999a470.pdf

Educational Support Personnel: https://www.polkea.com/_files/ugd/37eee3_a175600ee6e0469ca5f0ec9c0601c18e.pdf

2. Protection

Your union is an important part of protecting Florida's middle class by fighting for fair pay and benefits and protecting workers from being abused and disrespected at their jobs. Your contractual and legal rights, working conditions and employment will be aggressively defended.

PEA Member Booklet: https://www.polkea.com/_files/ugd/dd9ee0_7c61945d2ef24dadb419eed45bd9fdcc.pdf

3. Community Networking

PEA and FEA have the influence to represent you at the Legislature, your school district and everywhere decisions are made about your job. In the last few years your union has defended thousands of members against district harassment, unfair discipline, and changes to benefits; and fought for more money for public education and school employees.

4. Professional Development

Through FEA conferences, meetings, training, and communications, you are connected to other education staff professionals, public employees, and educators across the state who are dealing with the same issues as you.

FEA Professional Development: <https://feaweb.org/professional-development/professional-development-resources/#eventsresources>

PEA Professional Development: <https://www.polkea.com/professional-development>

5. Member Benefits

Through the buying power of our two national affiliates (NEA and AFT), you are eligible for big discounts on insurance, home financing and everyday purchases. Combine that with the FEA Member Benefits program and it's possible to offset the cost of your membership with member benefit discounts alone.

PEA Benefits Information: <https://www.polkea.com/memberbenefits>

FEA Member Benefits Facebook page: <https://www.facebook.com/FEAMemberBenefits>

6. Your Union

This is your union! Your local union and FEA are grassroots organizations run by and for their members. Every member has a vote and unrestricted access to every level of union governance: local, state, and national.



ORGANIZING

What is Organizing? Simply defined, organizing is . . .

- » **The process** of turning potential members into members, members into activists, activists into leaders.
- » **It is most successful** when led primarily at the building level, member-to-member, colleague-to-colleague focused on issues and built on relationships and experiences.
- » **Not a one-time event.** An organizing-focused union puts members and people at the center of all union work, not just during a crisis or when people are needed to “turn out” for an event they did not shape.



Face-to-Face/One-on-One Visits



Research and our union’s own experience has shown that mass emails and social media posts are minimally effective in building union membership and participation, but it remains the most utilized method of reaching out. **We must talk with colleagues in person.**

Rules for Organizers

1. Get close to the workers, stay close to the workers.
2. Tell workers it's **their union** and then behave that way.
3. Don't do for workers what they can do for themselves.
4. The union is not a fee for service; it is the collective experience of workers in struggle.
5. The union's function is to assist workers in making a positive change in their lives.
6. Workers are made of clay, not glass.
7. Don't be afraid to ask workers to build their own union.
8. Don't be afraid to confront them when they don't.
9. Don't spend your time organizing workers who are already organizing themselves, go to the biggest worst.
10. The working class builds cells for its own defense, identify them and recruit their leaders.
11. Anger is there before you are – channel it, don't defuse it.
12. Channeled anger builds a fighting organization.
13. Workers know the risks, don't lie to them.
14. Every worker is showtime – communicate energy, excitement, urgency and confidence.
15. There is enough oppression in workers' lives not to be oppressed by organizers.
16. Organizers talk too much. Most of what you say is forgotten.
17. Communicate to workers that there is no salvation beyond their own power.
18. Workers united can beat the boss. You must believe that and so do they.
19. Don't underestimate the workers.
20. We lose when we don't put workers into struggle.

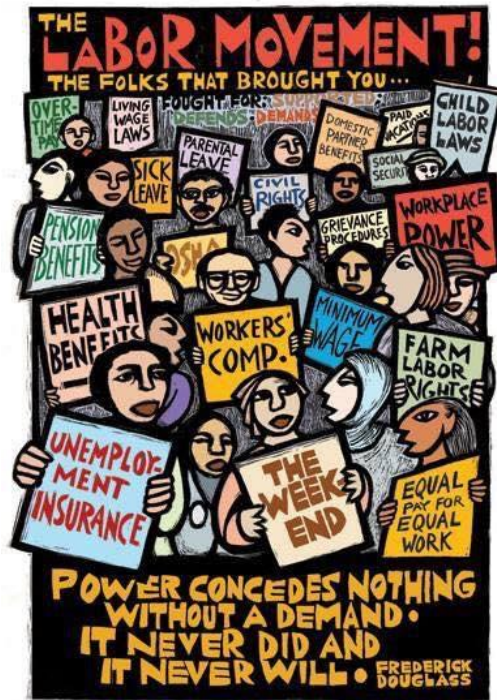
☆ Taken from 1199 Organizing Conference February 6-9, 1985. Columbus, Ohio

No Shortcuts: Organizing for Power In The New Gilded Age by Jane F. McAlevey, Oxford University Press, 2018



One-on-One Conversations:

- » Puts a face to your union – **YOU ARE THE UNION** (not some 3rd party)!
- » Allows you to identify key issues – uncovering what motivates people to move towards taking action.
- » It builds personal relationships and establishes trust.
- » It serves to relate information and deal with questions and objections.



Extensive research of public employee union campaigns has shown that a strong Contract Steward structure or broad-based Organizing Committee that uses Face-to-Face organizing is the strongest indicator for success for building strength.

See these resources:

- » “Union Tactics Matter: The Impact of Union Tactics on Certification Elections, First Contracts, and Membership Rates,” Silver Spring, MD: Institute for the Study of Labor Organizations Working Paper, 1995
- » Organizing for Social Change by the Midwest Academy Manual for Activists: Seven Locks Press, 2001
- » Rebuilding Labor: Organizing and Organizers in the New Union Movement Edited by Ruth Milkman and Kim Voss: Cornell University Press, 2004
- » “American Federation of Teachers Organizing Model,” AFT/AFL-CIO, 2006
- » Secrets of a Successful Organizer, Labor Notes, 2016. Available at: <http://www.labornotes.org/secrets>
- » No Shortcuts: Organizing for Power In The New Gilded Age by Jane F. McAlevey, Oxford University Press, 2018

The Organizing Conversation (One-on-One/Face-to-Face)

- * **is not** about selling benefits and services of membership or the attributes of the union organization.
- * **is** about building a relationship through which the organizer agitates the worker to action on behalf of self and collective interest.
- * **respects** the 80/20 principle (organizer generally spends 80 percent of time listening and 20 percent of time talking) and requires use of active listening skills.

Introduction

Who you are. Why you are having the conversation.



Part 1: “Getting the Story”

Purpose:

Information gathering and issues identification (“gathering the facts and getting the story”).

Sample Questions:

- What do you do?
- How would you describe a typical day at work?
- How have things at work changed for you over (selected time-frame)?
- What do you like/dislike about your job?
- Do conditions at work allow you to be/to do your best?
- How do you feel about (selected issue)?

Part 2: Who decides?

Purpose:

Examining power/powerlessness at work.

Sample Questions:

- Why are things this way?
- Who made/who makes these decisions?
- Why do they decide things the ways they do?
- Why don’t they listen to people like you?
- If you were in charge, what would you do?
- How do you feel about this?

Part 3: What could be?

Purpose:

Imagining possibilities of worker power.

Sample Questions:

What would you change at work if you had a chance?

What would it take/what would need to happen for you to do a better job and/or better serve your students/school?

What do you wish the future could be like at work?

Part 4: Take a Stand!

Purpose:

Agitation to action, taking both organizer and worker out of comfort zones (“putting the worker at the crossroads”).

Action in support of the union is discussed as a choice between:

POWER *or* POWERLESSNESS

Objections are understood and addressed as being based usually between sense of:

FEAR *or* FUTILITY

Organizers 5 Main Steps:

1. Telling their own “union story”

(But only if asked, relevant to issues at hand, or for other sound strategic reasons).

2. Getting worker to take action in support of the union.

(Nature of “action” varies based on situation, “The Ask”)

3. Assessment

(Is this a 1, 2, 3, or 4? 1 = Activist; 2 = Member; 3 = Need info/may join; 4 = leave me alone!)

4. Leader identification

(If a leader, call to greater action. If a follower, “take me to your leader.”)

5. Inoculation

(Organizer helps worker anticipate and prepare for what will be the likely reactions of the employer and/or co-workers to support for the union.)

Tips For Organizing Success:

Listen 80 percent of the time.

- » Stay calm, open, and respectful, even if you hear negative or hostile comments.
- » **Listen for:** What do people care about? What is their vision for change, for a better future?
- » **Ask:** Why are things the way they are? How would we change things for the better? What would it be like around here if we had more say?
- » Seek people out and take interest in them as colleagues, as people (as opposed to just wanting them to sign a form).
- » Be aware of what makes you effective and use your strengths.

Make our union the First Friend, Best Friend to New Hires.

- » The most important time you can spend is the time you spend reaching out to new hires, based on their needs.
- » Sustained, personal contact over time is the key.

Our local union and our affiliates are vehicles for collective action, not an insurance company or charity.

- » Language is important. **Our union is “us”** (“We the educators” or “We the teachers and education support professionals”) — not an outside third party, staff, or just the officers.
- » Seek to involve all in our union’s work, ask for input and participation early in the development of projects and planning, not after it has all been figured out by a small group.
- » Celebrate success as a result of collective action rather than attributing success to individuals.

“Issues-Speak” is Your Best Language.

- » Communicate with members on issues we care about, what we stand for, and what we are working to achieve together. Frame the issues around opportunity, quality, and student success and what our union can do when we work together.
- » Member discounts and services do not motivate people to get involved or join, so talk about them in the context of the economic issues that educators face.
- » Remember: Our union is about what we are doing together to build a better future vs. what any one of us “gets” in the here and now.

Our union has increased membership; we are growing faster than comparable unions around the country. We believe this is due to our colleague-to-colleague and positive approach. Our members care about public education and students.

Organizing Basics at Worksites

Building a powerful voice with your colleagues takes trust and commitment. Many activists want to rush into membership drives through e-mail blasts and/or passing out membership applications, but experience proves that there are no short cuts to building real power.



Organizing best practices include:

- Building a Worksite Leadership Team - you can't do it all alone!
- Knowing Your Data - members, potential members, activists!
- Organizing Around Issues – listening more than talking!
- Outreach to New Employees – be their first friend/best friend!
- Engaging the Community—Student success involves everyone!

1. Keep Calm and Build a Worksite Leadership Team

Your worksite leadership team should reflect all the workers – you want to see a diversity in terms of grade level, subject area, experience, age, gender, ethnicity and job family. Focus on face-to-face conversations to identify your team. Build from who you know and who the people you reach know. You want to identify respected leaders already on campus, find them by asking who people count on at work.

2. Know Your Data

Maintain an accurate database of your entire bargaining unit. Verify non-work emails & cell phone numbers of all members (and potential members, if possible!) Collect data on degree of support for our union movement and priorities. Collect and add information specific to individual potential members.

Having data makes your job easier! Mapping your worksite is a great resource for your data. It allows you to identify your members and potential members, micro-target, and have quality conversations to engage your colleagues where they are and based on their interests.

3. Issue-based Organizing

The key here is listening. What do your co-workers care about? What changes would they like to see? Who are the respected leaders in each worksite? We suggest questions like “What do you love about working here?” as well as “What would make working here better?” and “Do you have a voice in how things are run around here? What might it be like if staff/teachers had a more powerful voice in how things are run?” What are they willing to do about it? As people show their support, ask them to help build a powerful voice together by talking to 1-2 of their colleagues. Ask if they will join you at the next meeting or attend an event.

4. New Employee Outreach

Quality, personal introduction of new hires to our union as soon as possible, is key. It allows us to define who we are and welcoming them will allow you to develop a relationship prior to the ‘ask’.

Introduce and share that you are a Contract Steward for our union. PEA wants to help them succeed. We have resources available to support their success.

“Our membership is made up of excellent teachers and educational staff professionals (paras & secretaries), we invite you to be a part of this dynamic group.”

Make sure you say the words, “Your success is a priority of our union and your support is a commitment I make to you as a Contract Steward.”

New Employee Outreach – ‘What to Expect’

- » **School policies (unwritten & written)**
- » **Parent – Teacher Conferencing**
- » **Channels of communication**
- » **Expected duties**
- » **Materials/Supplies**
- » **When a substitute is needed**
- » **Faculty/staff meetings**
- » **How/where copies are made**
- » **Payroll & Benefits**
- » **Contract highlights!**

5. Community & Student Engagement

Our public schools belong to all of us: the students who learn in them, the parents who support them, the educators and staff who work in them and the communities that they anchor. Together, we will work to make our collective vision of public education a reality.

Sample One-on-One Conversation

1. Introduce yourself and say why you're visiting.

If you know the person:

Hi _____, I wanted to talk with you about our union, and our contract and why we need to stand together now.

Or if you don't know the person:

Hello _____. I'm _____, a member and Contract Steward of PEA, and I was hoping we could talk about your work here and how to build a stronger voice for educators at [worksites].

2. Get their concerns! Ask probing questions. Listen 80% of the time.

- » Start with asking what they do and how it is going (if you don't know).
- » Ask what they like about their work.
- » Ask what they'd like to change or improve about their work.

3. Explore the issue the person cares about. LISTEN! Tie their concerns to our union's priorities/contract or collective strength.

- » Having identified the issue or issues the potential member cares about, ask more questions to get them to articulate what is unjust about the situation and what could be done about it.
- » State why you joined – your own experience is compelling.
- » Explain that our union only represents fellow dues-paying members in grievances and binding arbitration.
- » Explain some of the things that have been won or are being worked on through our union or a current campaign (have talking points about our union).

4. Ask for a commitment.



Unapologetically express that they should take a stand if they want a strong contract and serious voice for teachers, paras, and secretaries.

“We invite you to take a stand and become part of our union – are you ready?”

If “Yes”:

Good, here is the membership application to fill out (wait while they fill it out).

To really have a voice and a vehicle to make the changes you want, we need more than your membership — we need you to get involved. Can you:

- *Wear your t-shirt (button) on Tuesday when we bargain?*
- *Come to the meeting on _____?*
- *Introduce me to two of your colleagues to talk about getting involved with our union?*
- *Join a committee?*

If “No” or “Considering”:

Thanks for talking with me. Do you have specific concerns or questions making you hesitate?

Be sure to leave the door open for a friendly return visit in the future.

5. After the visit, reflect on how the conversation went and **record your notes**. Assess the person’s support and decide what might be a good next step.

Keep track of this somewhere (i.e., a Word document, a union notebook/binder, etc.). As soon as possible, debrief (share) this information with your District Representative, Membership Committee Chair, and/or Service Unit Director.

Talking Through Resistance

The people whom we organize will often demonstrate initial reluctance to making a commitment to our local. How can an organizer effectively respond to resistance? Some Dos and Don'ts include:

Don't trivialize or ignore someone's reasons for hesitating.

The reason someone gives for not joining is often a clue to what motivates the decisions they make. They are being honest with you, that is good!

A person's reasons for hesitating can sometimes tell you as much about what they care about — and what will ultimately secure commitment to our union — as anything else you learn in an organizing conversation.

Don't argue with the person whom you're organizing.

You can't secure a commitment by scoring points in a contest of reason or rhetoric. Organizing isn't about rebuttals; it's about speaking to someone's convictions after carefully hearing them out. Try to not think over your response while they are speaking — actively listen.

Don't mistake someone's initial hesitation as an absolute/permanent refusal.

It takes a lot of emotional and cognitive work to overcome inertia and make a commitment. Talk through someone's reasons for hesitating rather than writing off the prospect. Remember your own resistance to joining or getting involved. It's important to respect a colleague's position while at the same time working with him or her. This process will occur over the course of several conversations.

Don't hesitate to return to your colleagues to discuss the issues again.

Sometimes experience or reflection will get the person to see the value of our local and our collective bargaining agreement (PEA-negotiated contract). **Keep trying!**

Do return the focus of the conversation to issues the person cares about.

A strong commitment is always rooted in a desire to act to address issues. Bring the conversation back to these issues — pay, evaluation, testing, autonomy, healthcare, planning time, family leave, respect, inequality, etc. — keep the person thinking about what is important to them. Ask whether they imagine positive change occurring in the absence of a strong union.

Do use a person's resistance to help identify how they see their own self-interest.

Someone's perceived self-interest will drive most if not all decisions, and the reasons someone gives for not committing support often reveal what will motivate them to commit support.

Recent research provides overwhelming evidence for our purposes:

- » There is an urgent need to communicate about our union on the basis of issues. Too many have merely a functional (vs. substantive) view of their union. It is seen as irrelevant to their most deeply felt issues.
- » We are responsible for this because of transactional or service (vs. transformational or organizing) model of recruitment in the past.
- » Dues are the number one objection to membership. (The good news is that it is to the exclusion of almost all others.) Dues objections are nearly always about value and relevance—not affordability.
- » Our greatest enemies: lack of knowledge and lack of sustained personal contact with union colleagues. For too many, their union is distant and something other than themselves.
- » In the absence of union knowledge, job dissatisfaction does not translate into support.
- » **There simply needs to be more asking!** The number one reason people have not joined, when polled, is because they were not personally asked to join. And members say our union does not do enough to get them involved.

Common Objections

Objections can usually be classified into one of four broad categories:

- » **Cost** – “I can’t afford the dues.”
- » **Experience** – “I used to work at a place where our union was really ineffective.”
- » **Status** – “We’re not assembly-line workers and I don’t think a union is appropriate for us.”
- » **Security** – “I’m not interested in making waves.”

Having used someone’s objections to identify self-interest, the organizer then connects that self-interest directly to having a strong union. What follows are some helpful responses. Keep in mind that it’s more important to listen and talk about building strength than to rebut.

Cost

“I can’t afford to have dues deducted from my bank account.”

- » State your own reasons for joining and explain your own hesitations. Be honest that dues are a financial commitment but explain how important it is to have a counterbalance to the administration and to have a voice in the state of Florida.
- » “Membership strength translates into a greater say in our economic future and greater influence in the political arena. Your support will help make the changes you said were important to you.”
- » Don’t be apologetic or “soft-sell membership”. Membership is not a favor to you. Respond with your own reasons for paying dues and why it’s worth it to you.

- » Quote dues in lowest terms: per day, per pay period, etc. “The deduction is \$31 per pay period, or \$7.00 a week, or \$1 a day.” Some Stewards show their paystub.
- » Share successes that you have had through member advocacy, lobbying and bargaining to show that dues are a good investment.

Experience

“The Union just doesn’t seem effective.”

- » “Our Union is not perfect, but it’s democratic, and it is our voice. The more of our colleagues who get involved and help make it stronger, the more we can do. Would you rather the administration, Superintendent, or the School Board to speak for employees and make all the decisions that affect us?”
- » “Our union believes that you — teaching, supporting, interacting daily with all our students, making this district work— should have a say in what your job should be, how problems surrounding it should be solved, and how much you should be paid for it.”
- » “How could it be done better?”

Status

“We’re not assembly-line workers. I don’t think a union is appropriate for us.”

- » “Teachers and Educational Staff Professionals do have a different culture from other workers, but we still need to be organized and speak up for education and our interests. The district has teams of employees working on all kinds of issues related to your working conditions Who represents your interests? Together we do, through our union!”
- » “If you examine our track record, it has been our union who has stood for employees working conditions, increasing pay, autonomy in the classroom, fair and objective evaluations, for resources so that we can perform our jobs, for increasing our freedom from bureaucrats, etc. Our union — not the administrators, not the Superintendent, not the School Board — has held the district accountable for their actions and works tirelessly to create the schools that every student deserves!”

“I’m not planning on staying in this job” or “I plan to retire soon so why should I bother?”

- » “I know it’s important to you to maintain the integrity of our profession. Supporting our union now will go a long way towards putting education before politics.”
- » “There are thousands of people in your position across the state and your membership will help right now. Not joining weakens our collective power whether you are here for a year or thirty.”
- » “If you support the issues we’re coming together for, joining makes our voice stronger. If you don’t stay, at least you took a stand while you were here.”
- » “Your retirement’s stability depends upon current and future employees, and the plan our union continues to defend. We need your support to continue providing a stable, healthy retirement for others and to protect your own pension plan.”

- » “Join now and stay involved through one of our Retired chapters. You’ll not only remain a vital part of education in Florida, but you’ll benefit from our union continuing to work to protect your investment and your future!”

Security

**“I’m not interested in making waves,” or
“If I get active in our union, I will not get renewed,” or
“I will not be evaluated fairly.”**

- » “Our union creates stability and provides procedures and standards that the employees and administration negotiate together. Showing your support by taking a stand with your colleagues doesn’t mean you have to make waves as an individual; it means you stand with your colleagues in an organization that represents your interests.”
- » Reassure the prospective member by expressing your self-confidence and sharing your experience as a union member who has not seen retaliation.
- » “One of the reasons we have a union contract is to prevent arbitrary treatment. Do you really believe you will be retaliated against for joining? If so, we need to fight that because your constitutional rights are being ignored.”
- » Name some colleagues who are members who they respect that have not been retaliated against or who serve in leadership roles.
- » “Many administrators are strong union supporters, or they at least understand the benefits of working collaboratively with our union.”
- » “Our Stewards are leaders in their work sites, and many serve on school and district committees.”
- » “It is against Florida Statutes to retaliate against you for union activity. The U.S. Constitution and Florida labor law protects your right to form, join, and participate in any employee organization of your own choosing.”
- » “Most of our administrators were at one time union members, and some were even union leaders.”

Objection Response Checklist: Affirm-Answer-Redirect

QUESTIONS	AFFIRM	ANSWER	REDIRECT
Dues Costs: “I don’t think it is worth being involved with the union because dues are so expensive.”	I can understand why you would be concerned about dues.	The dues are _____. The way our dues work is _____.	There are two ways that we get our power as a union. Money and people.
Free Riders: “Why do I have to join? Because I do get the benefits without paying for it.”	I can understand why you would feel that way.	Currently, (% of members) of our colleagues pay dues to fund the bargaining of our contract.	As you know, we are trying to solve (insert issue here) this year and our association is working hard to make sure we are able to function as professionals in our work. Since we agree on that, we need everyone involved to win this fight. Will you join?
Bad/Lazy Workers: “I have heard that unions have members who are incredibly lazy or bad teachers. Why would I be involved with a union that is just going to protect bad educators?”	I can understand your concern.	A union can’t protect anyone that is unable or unwilling to do their job. It is simply about having a fair set of rules that apply to everyone.	There is a process of handling those unable or unwilling to do their job. It is a distraction to talk about the union protecting lazy workers rather than the issues that concern us. (Specify an issue you have heard.)
Futility: “Why should I be involved with the union? The union can’t do anything about classroom size.”	I can understand your concern. Classroom size can be a challenging issue to address.	In fact, union members have been able to get classroom size language into many of their contracts.	Right now that is a decision that is solely up to management. As a union if we fight together we can have a voice in decisions around classroom size. We deserve to be a part of the process.
Self-Interested: “I have heard that teacher unions care more about themselves than their students. I care about the kids, I’m not selfish.”	I can understand your concern.	There have been years of attempts to discredit educators. Human beings sometimes make mistakes, but no teacher got into this profession for the fame or fortune.	Teachers get involved in their unions because they do care and know that their working conditions affect the ability for their students to learn. States and countries with strong unions actually produce higher student achievement results. When educators come together and act as a strong voice for public schools, they are able to push for more school funding, adequate resources for struggling children, and state assessments that measure genuine student progress rather than good test-taking skills.
Too Political/Liberal: “The association should stay out of politics. I’m a Republican, not a Democrat.”	That’s a completely valid feeling.	Because every decision about public schools is made by elected officials, we do endorse candidates and get involved in many political issues at the federal, state, and local level.	However, these decisions are made by members and any endorsement is based on a candidate’s support of public education and educators. We also legally can’t use member dues dollars for PACs and you are free to support whomever you think is best for education.

Assessing Your Worksite

Ranking your Worksite

After a One-on-One conversation with a worker, assess where you think their support is with the Union Support Scale. Turn in your notes with an assessment to an Executive Board Member or your Service Unit Director. These notes and rankings are only used internally. Anything told in confidence should not be stored. Only rank people after conversations; be careful not to make assumptions prior to talking.

If you aren't sure how to rank a colleague, talk it over with another member of your worksite team. These assessments will change as we continue having conversations and move people from undecided to active.

Review Assessments Often

Keep engaging colleagues – **organizing is a process!** Follow up by answering a question someone you visited asked about or go back to hear their views on something Our Union is doing. Continue to ask targeted questions to figure out what is most important to your colleague. Don't always lead with your concerns at the expense of listening!

See if someone you have tried to recruit will go with you to a social or to observe bargaining. Keep in touch as the year goes on and keep asking questions and engaging the prospect. Sometimes an undecided colleague can become a serious leader because someone they trust kept reaching out and listening. Build trust, stay positive and keep the door open!

What is Mapping?

Mapping is assigning each member and potential member at a worksite a color/number code that corresponds with a key that describes what you know about them. There are people who influence others, leading in both positive and negative ways. It's important when mapping to know who is influential and how they feel about our union.

Mapping is a worksite leadership team activity to create a physical depiction of a worksite that illustrates presence and physical proximity of educators and staff based on such factors as membership, job title, assessment status, etc.

Once created, a map gives us a look at selected data from a bird's eye view and provides a starting point for strategic discussion for organizing and engaging our members.

Union Support Scale
0 Not assessed
1 Leader/Activist
2 Member
3 Potential Member
4 Anti-Union

Why Map?

- Visual
- Identify our strengths
- Identify our weaknesses
- Data

When Do We Map?

- Prior to action
- Post action
- Frequently

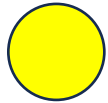
Coding Example: Color



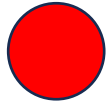
Blue – Members/Leaders (activists – like You!)



Green – Members (some are active and almost “activists”)



Yellow – Potential Members (spend most of your time with this group building relationships through One-on-One conversations!)



Red – Anti-Union (very few people; continue to be friendly and answer questions)

Mapping Using a Worksite Map

Steps:

1. Update roster
2. Fill in each room with employee’s name and position/contract (i.e., teacher, ESP)
3. Notate Contract Steward(s), Union Officers, Committee Members, Executive Board members
4. Use a coding system/key to code all (the Color Coding works best for maps)
5. Next, identify trends
6. Assign a mentor/recruiter to each potential member
7. Meet with the assigned member and make a plan

Important Reminders:

- Rosters and maps should only be shared among members.
- Due to the sensitive information contained on rosters and maps, always shred when discarding.

- Set aside 10-15 minutes at each worksite or Steward meeting to update rosters and maps.

From Potential Member to Leader

We **must** move bargaining unit members towards involvement and engagement in our union if we are to see real change, grow, and thrive as a powerful union!

Engagement

Worker starts to see reasons to become interested in/pay attention to our union through conversations.



Activation/Recruitment & Retention

Worker begins voluntary action in support of our union.

Worker joins and remains a member.



Induction

Worker is oriented to our local – comes to know our history, structure, values, etc.



Continual Activation

Worker continues voluntary actions.



Secondary Leadership

Worker assumes a formal leadership role
(Contract Steward, Committee member, etc.)



Primary Leadership

Worker advances to highest levels of elected leadership (Committee Chair, District Representative, Officer, etc.)

Get all members at your worksite involved! Assign duties to everyone: Building/Department Captains; someone to distribute literature; someone to host meetings; someone to attend the monthly Contract Steward meetings when you're not available (be sure to sign a proxy form). Work as a team to make your members active and **Your Union** stronger!

If we are not engaging members on every level, our union will stagnate and we will lose ground. If we don't ask members to help build their union, they will think they are not needed. We must ask others to get involved if we want to build a powerful, grassroots union chapter!

What is a leader?

Anyone with followers is a Leader. This is the most important criteria!

How do we identify Leaders?

By asking people! Organizers do not “pick” or “choose” Leaders - if we ask the right questions, people will identify their natural leadership. Some helpful questions in identifying the leaders are:

- Who is respected? Who do people go to for advice?
- Who is active in the school?
- Who holds any positions of leadership?
- Who has a strong personality? Do people dislike them because of their strength, or do what they say?
- Who listens well?



Checklist for Identifying Leaders

Identifying leaders is a process and takes time. You can only assess their potential leadership capacity through multiple interactions. Good leaders empower others to become leaders. Review the list below and note when you see members and potential members show the capacity to become leaders.



-
- ☐ Listens and observes before talking.
 - ☐ Understands and believes in the power of Unionism.
 - ☐ Acts enthusiastically and willing to work.
 - ☐ Holds a place of trust and respect with their coworkers.
 - ☐ Responds positively when given opportunities to engage in leadership.

Member Benefits



People join their Union because of issues they care about and because they want a voice and a vehicle through which they can make improvements. The benefits on this page are “icing on the cake.” You can save many times your annual dues by taking advantage of our wide array of membership services. Our Union has packets about these programs. Have some with you at functions and send them to new members to help with retention. These services include:

1. \$1,000,000 Professional Liability Policy: You are automatically covered for this amount should you be sued while acting in your professional capacity. The policy even covers actions brought against you as a member of a peer committee.
2. Attorney Referral Plan: You are entitled to two free half-hour consultations with our attorneys each year on personal legal matters, as well as discounts should you retain one of our referred attorneys.
3. Home ownership, Renter’s and Automobile insurance plans available.
4. Long Term Disability: The best available!
5. Mobile apps for discounts on the go, free subscriptions and magazine discounts, consumer guides, financial planning, AT&T cell phone discount and more.
6. Free life and accidental death and dismemberment insurance: \$2500 benefit for accidental death and dismemberment that occurs on the job or while serving as a union leader.

Shop these programs on the web for more information:

FEA: www.feaweb.org/member-benefits <https://fea.accessdevelopment.com/home>

NEA: www.neamb.com

AFT: <https://www.aft.org/member-benefits>

Union Plus: <https://www.unionplus.org/>

ShareMyLesson: www.sharemylesson.com

The Work of Our Union

WHAT WE DO TOGETHER THROUGH OUR STATE AND NATIONAL AFFILIATES:

- » We guarantee crucial rights and benefits in legally-binding collective bargaining agreements for over 140,000 education professionals in our state, and 4.2 million nationwide (these agreements cannot be altered by the unilateral action of politicians or administrators).
- » We ensure that teachers, paras, and education support professionals have a significant role in determining the conditions under which we do our work in research, teaching, and service.
- » We negotiate salary increases and working conditions.
- » We enhance the scope of professional development and career building opportunities.
- » We represent members in grievances and arbitration hearings.
- » We defend collective bargaining rights before the legislature, labor board (PERC), or in court.
- » We protect members from arbitrary and illegal terminations, layoffs, and non-renewals.
- » We represent colleagues in disciplinary meetings.
- » We speak out against and defeat encroachments upon academic freedom.
- » We protect core academic principles and build a movement for quality public education.
- » We lobby the state legislature, governor, and the public on public-education issues – and much more!



Key Terms and Phrases

Bargaining Agent (Union):

A group, agency or organization (i.e., a labor union rather than an individual) authorized to bargain collectively on behalf of its members or bargaining unit. The Screen Actors Guild, for instance, is the bargaining agent for movie actors. Having a Bargaining Agent brings democracy to the workplace, allowing those who do the work to make decisions about their professional lives.

Bargaining Unit: The group of workers that negotiates collectively with the employer through their elected bargaining agent. The boundaries of the bargaining unit often are a subject of dispute between union and employer, since these can determine which employees are entitled to representation.

Collective Bargaining: Bargaining is the only legal context in which the administration must listen to the voice of employees. It's a democratizing force in the workplace. In the language of labor law, it is: The negotiation of employment matters between administration and employees through the use of a bargaining agent that is designated by a majority of individuals within a bargaining unit. In short, it is when a group of people join together to enforce their collective voice in the hopes of securing higher salaries and better working conditions. When a majority of employees in a workplace vote in favor of being represented by a bargaining agent, the administration is legally bound to bargain all employment conditions "in good faith" with the elected agent. It is illegal for employers to interfere with their employees' right to bargain collectively.

Collective Bargaining Agreement (a.k.a. CBA or the Contract): A legally-binding agreement between an employer and a bargaining agent that represents its employees. A contract contains rules and regulations that set the terms and conditions of employment plus any additional benefits negotiated and is valid for a specified period of time. Breach of the contract by either side may be cause for a grievance, arbitration, or a charge of Unfair Labor Practice. For a contract to become effective, it must be approved by the bargaining unit by majority vote.

Grievance/Contract Violation: A dispute or difference arising between the employer and one or more employees,

claiming a violation of the Contract. A grievance is resolved through the grievance procedure, which is a systematic approach to handling workplace problems spelled out in the Contract. Our union only represents dues-paying members in contract violations. Non-members may represent themselves or hire an attorney.

Issues:

These are the compelling reasons that the majority of employees want union representation and, as such, they are the issues of all membership recruitment efforts. A member recruitment plan focuses on these issues, organizing employees and union activities around them, and prioritizes them during contract negotiations.

PERC:

The Public Employees Relations Commission (PERC) is the agency that administers Florida's collective bargaining law (Florida Statutes, Chapter 447). It oversees public-employee union relations and disputes, or relations between a union and a public employer. To do this, it conducts hearings at which they determine bargaining units, verify authorization cards, conduct elections for collective bargaining, supervise the bargaining process, hear charges by either side on Unfair Labor Practices, mediate impasses, and adjudicate similar issues. The Governor appoints the members on the board.

"Right-to-Work" laws: An anti-union term coined to describe state laws that make it illegal for a contract to contain clauses requiring union membership among all who receive the benefits. In Florida, right-to-work laws make our membership recruitment efforts difficult because only those who seek membership pay in. Majorities support the union but aren't legally compelled to pay for the work it does. Public employees in many southern states have no collective bargaining rights whatsoever.

Union Dues: The payment that members make to their union. The amount is set by either the constitution or by-laws of each union and is approved by the membership. Dues pay for overhead (copies, office, technical equipment, etc.), as well as lobbying, legal representation, and staff at the local, state, and national levels.

Polk Education Association

Affiliated with FEA, NEA, AFT, AFL-CIO

730 E. Davidson Street, Bartow, FL 33830, Telephone 863-533-0908
www.polkea.org

Grievance Fact Sheet

This form is to be used by the Contract Steward in investigating a grievance. The FACT SHEET outlines the information that will be necessary to develop a strong case. Use additional pages to document all the details.

DO NOT TURN THIS FORM INTO ADMINISTRATION. THIS INFORMATION IS FOR OUR UNION'S USE ONLY.

Grievant: _____

Worksite: _____

Date of incident: _____

Today's Date: _____

What happened? (Also describe the incidents which gave rise to the grievance)

Who was involved? (Give names and titles—include witnesses)

When did it occur? (Give day, time, date(s))

Where did it occur? (Specific location)

Why is this a grievance? (What article and section of the contract has been violated?)

What adjustment is required? (What outcome would satisfy the grievant?)



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Conference Log

DATE: _____ **TIME:** _____

LOCATION: _____

TOPIC/REASON FOR MEETING:

PERSONS IN ATTENDANCE:

PERTINENT INFORMATION:



OUTCOME OF DISCUSSION: _____

LOG ENTRY VERIFIED AS VALID BY:

PEA REPRESENTATIVE: _____	DATE: _____
PEA MEMBER: _____	DATE: _____
ADMINISTRATION: _____	DATE: _____
OTHER: _____	DATE: _____



Polk Education Association

Affiliated with FEA, NEA, AFT, AFL-CIO

730 E. Davidson Street, Bartow, FL 33830, Telephone 863-533-0908

www.polkea.org

Grievant's Statement

Name: _____

Date: _____

Home Address: _____

Home Phone: (____) _____ - _____

Cell Phone: (____) _____ - _____

Home Email: _____

Worksite: _____

Contract Steward(s): _____

The following is a statement of what happened to me on: _____

(Date of Incident)

I authorize PEA to file a grievance on my behalf.

Signature: _____



PEA Officers/Staff/District Reps Contact Information

OFFICERS/OFFICE STAFF			
Name	Office/Position	E-mail	Phone
Stephanie Yocum	President	stephanie.yocum@floridaea.org	(386) 916-8902
Kat Nickell	Executive Vice President	kat.nickell@floridaea.org	(863) 529-9056
Patrick Bentley	Secretary/Treasurer	Patrick.bentley@floridaea.org	(863) 333-1974
Michele Masse	Vice President of Paras	michele.masse.pea@gmail.com	(863) 209-3180
Branden Lane	Service Unit Director (East)	branden.lane@floridaea.org	(863) 535-5532
*Nadia Hernandez	Service Unit Director (West)	nadia.hernandez@floridaea.org	(863) 535-5541
Lisa Francoeur	Office Staff	lisa.francoeur@floridaea.org	(863) 533-0908
*Nieves Ramos	Office Staff	nieves.ramos@floridaea.org	(863) 533-0908

*Nadia and Nieves are bilingual in Spanish and English

DISTRICT REPRESENTATIVES			
Executive Board Members (2024-2027)			
Name	Office/Position	E-mail	Phone
Laura Allgood	District 1 Representative	Lauraallgood@comcast.net	(863) 669-3860
Maryanne Hyacinthe	District 1 Representative	Maryhyacinthe@yahoo.com	(863) 398-9001
Stephanie Eady	District 1 Representative	Eady_stephanie@yahoo.com	(386) 209-8810
Francoise Carson	District 2 Representative	ffiliace@yahoo.com	(863) 838-8833
Matthew Crowley	District 2 Representative	Matthewcrowley9@gmail.com	(863) 999-5896
James Neal	District 3 Representative	sirjamesnealii@yahoo.com	(863) 279-5967
Kaila Paige-Culmer	District 3 Representative	Pearly419@AOL.com	(863) 398-5004
Mike Hayde	District 3 Representative	coachhayde@gmail.com	(863) 205-3353
Kaitlyn Gattie	District 4 Representative	Kaitlyngattie@yahoo.com	(863) 514-6775
Deldrick Leonard	District 4 Representative	darthurleonard@gmail.com	(863) 412-8551
Nicole Hermes	District 4 Representative	niche7729@gmail.com	(863) 632-5881
Tanisha McLachlan	District 5 Representative	Tmclachlan77@gmail.com	(863) 670-9282
Rebecca Schempp	District 6 Representative	rebecca.schempp1@gmail.com	(931) 241-7728
Kari Walker	District 6 Representative	kam1030@yahoo.com	(863) 512-3928
Pam Barnes	District 7 Representative	pammybear1@msn.com	(863) 738-2702
Robyn Silva	District 7 Representative	robynesilva@gmail.com	(863) 409-4253



PEA Committee Chairs/Co-Chairs Contact Information

Committee Chairs/Co-Chairs Executive Board Members (2024-2027)			
Name	Office/Position	E-mail	Phone
Kat Nickell	Professional Development and Instruction Committee Chair (PD)	kat.nickell@floridaaea.org	(863) 529-9056
Patrick Bentley	Budget Committee Chair	Patrick.bentley@floridaaea.org	(863) 333-1974
Christy Kirkland	Government Relations-Legislative Committee Chair	christykturmer@gmail.com	(863) 698-6832
Jean Regan	Organizing Committee Chair	regwel83@yahoo.com	(727) 278-8492
Aimee Smith	Elections and Credentials Committee Chair	asmith-polkea@outlook.com	(863) 781-4919
Kristina Thorwegan	Human Relations and Social Media Committee Chair	kthorwegan@gmail.com	(678) 768-8182
Victoria (Tori) Mills	FYRE Chair	v.mills1216@gmail.com	(863) 370-8466
Kat Nickell	Constitution and Bylaws Committee Chair	kat.nickell@floridaaea.org	(863) 529-9056

