

MEMBERSHIP UNITY PROGRAM



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Our mission: To improve the lives of our members, students and community.

MEMBERSHIP UNITY PROGRAM

Welcome to CSEA's Membership Unity Program (MUP). This is a project designed to build stronger, more active CSEA membership, and empowering them with the techniques and knowledge needed to make your chapter more effective.

When you leave this program you will have a tentative MUP Plan ready to implement when you return to your chapter. At that time you and your chapter will work with your staff and write up a final MUP plan and budget request. Your plan will run from now until May 31st.

At the end of this school year a few MUP chapters will be selected as the grand-prize winners for this year's MUP, and will be highlighted at the annual CSEA conference. Your chapters' effectiveness as a MUP chapter will be judged by comparing it's strength and effectiveness today with where it ends up by the end of May. It will also depend upon how your chapter uses the organizing tools covered in the MUP training.

We intend for this to be a competitive program with awards, rewards and recognition. The criteria to win has many factors, however, the most important criteria is you. You are here because we believe you are willing and able to provide the leadership and commitment needed to make this program work. The real winners of a MUP chapter's success are the members within your chapter.

Staff will be assigned to help your team if you hit difficult situations, but getting your leaders and key members involved in building their union is the key to this program. We strongly suggest that your first task upon returning to your chapter is to convey the spirit of this training to your chapter leaders who were unable to attend.

Based upon our evaluation at the end of the program some of you will be called upon to share your experience and expertise with other CSEA chapters as they begin their training program next year. Until then we bid you welcome, good luck, and good decisions in the months ahead!

ISSUE ORGANIZING

The key to success in any internal organizing campaign is involvement of the membership in actions and decisions that affect them.

Some actions that affect union members are collective bargaining, settling a grievance, lobbying for a legislative bill, improving work place conditions, and protecting jobs.

Decisions that affect classified employees are made by the Board of Education, union leaders, elected politicians, and community leaders. These decisions are often made without benefit of input from the people who are affected by the decision. This need not be the case.

The union members can and should be involved in these decisions and actions. We must use every opportunity to involve our members. Why is involvement so important?

Involvement affords opportunities for the individual member to:

- recognize and be aware of the concern faced by others
- have “ownership” of the solution
- apply their personal experience to the concern and the solution

The Membership Unity Program is designed to reach everyone in the bargaining unit, especially nonmembers and those members who may be less active in the union.

Issue Organizing versus a “Service Model” Union

In trying to do a good job, chapter leaders often defeat their own efforts by relying too heavily on the “servicing model” union technique— trying to help people by solving problems for them. **IT IS TIME TO BREAK OUT OF THAT MOLD.**

A more successful union technique is helping members to solve their own problems. Service models are “traditional.” An organizing model is more effective.

The “traditional” model limits and narrows the union’s activities and creates attorney/client relationships between the union and its members and the union and management.

Union contract language and procedures and the enforcement of these contracts are the “traditional” way to resolve grievances and other work place problems. Union contracts can be precise and constricting as to the type of issue that can be resolved through the negotiated grievance procedure.

In “traditional” models, union members become “dependent” on their leadership and paid staff to solve all labor-management problems.

The process of resolving a grievance, up to and including arbitration, can take months. When solutions are slow to materialize, interest in the concern

wanes. Grievance processing is “traditional” and it is effective, but organizing the members around the grievance issue can be more effective.

How is “traditional contract servicing” different from an “issue organizing” model?

- An organizing model of problem solving involves not only the effected employees but the potentially effected employees as well. There by increasing participation in the union process.
- An organizing model of problem solving is sharing information with members. This information sharing often motivates them to action.
- An organizing model of problem solving is more creative and brings about degrees of resolution in a more timely manner.
- An organizing model of problem solving is a step toward member independence and empowerment as members are educated to their RIGHTS.

Member education, member empowerment and effective problem solving are CSEA’s statewide goals and the goals of the Membership Unity Program. An organizing model of union service is the key to achieving these goals.

Compare the “Service/Organizing” models

Issue: District is violating a safety standard.

Traditional Service Model

LRR is notified and files a grievance or complaint with the safety committee.

Organizing Model

Union circulates petition demanding that management correct the situation.

CSEA members put up an informational picket line around the Board of Education meeting.

Local media receives press release about union’s efforts to improve safety in the schools.

LRR files a grievance alleging violation of the health and safety provision of the contract.

CSEA files a complaint with OSHA.

As you can see, the “organizing” model incorporates the “servicing” model and the grassroots efforts that built the labor movement from its beginnings. It is extremely effective and can be used during collective bargaining, fighting for legislative changes, improving the work environment, building support for career development whatever the current issue(s).

At first, an organizing model of unionism creates more work than its “servicing” counterpart. But this is only temporary. The leadership must be flexible

and willing to shed old ways of doing things. The advantages of this willingness to change are many:

- Organizing model is more effective than the servicing model.
- Members are empowered by the process. This is true even though problems are not always resolved to the personal satisfaction of every member.
- Organizing models educate the members about the nature of the dispute(s), otherwise known as an issue, between the union and the district.
- Organizing model builds the chapter into a force of many as opposed to a service organization of just a few.

Issue Identification, Development and Promotion

An issue of concern or interest to the members of the bargaining unit may not be a dispute between the union and the district. An “issue” may be something the union has achieved or accomplished. An “issue” may be a decision or action of the Board of Education that effects the bargaining unit or the community.

Identifying the issues most pervasive and important to the members of the bargaining unit is a primary function of the Membership Unity Committee.

This is where you start:

- Survey the unit members (written or oral).
- Note disputes affecting one or more members of the unit.
- Note bargaining history and/or unresolved grievances.
- Note Board of Education actions and decisions.

Now determine if the issue is an effective organizing tool.

Ask these questions:

- Is the issue popular among affected employees?
- Is the issue winnable at least in part?
- Will the issue attract public as well as membership support?
- Will the issue have negative fallout?
- Will a resolution of this issue build the union?

How to develop an issue

The identified issue is developed as we educate the membership. Developing an issue is a way of progressing in an objective manner toward a realistic goal.

STEP 1 Announce the issue to unit employees (flyer or letter). Describe the issue and indicate previous strategies effective in resolving like issues. Call a special meeting of the bargaining unit. Encourage attendance with phone trees and reminder notices.

STEP 2 At special meeting of the bargaining unit (or classification meetings) distribute an issue fact sheet and present an overview of the issue. Allow for open discussion of the issue so employees can “vent.” Pose the following questions to those in attendance.

- How are you affected by this issue?
- How would you like to see the issue resolved?

STEP 3 Reach a group consensus as to prioritized resolutions (make sure the suggested resolution is do-able). Staff can assist at a consensus building meeting.

STEP 4 Motivate/inspire unit members to support issue resolution. Show the members in presentations and printed material how the union is harmed by the present circumstances and how the resolution will improve conditions for the union and for individuals in the bargaining unit.

STEP 5 Promote the issue among the unit employees. This can be done with petition drives, worksite meetings, handbills at worksite and other public events, newspaper ads, letters to editor, media communication and high visibility activities, i.e. wearing buttons.

Following these five steps will result in effective issue development and will insure participation in the issue organizing program by all or most all of the unit employees.

Marketing the Membership Unity Program

Marketing is not just selling. Marketing is the “hook” that attracts the interest of the targeted audience long enough to achieve name recognition of the product, program or personality.

Member Unity Programs must be marketed. The following “rules of marketing” will help you not only “sell” your program to unit members, it will help make your project a household name.

Fundamental rules of marketing an idea

- Develop a “catch” name/phrase. This will help insure immediate recognition.
- Present the “catch phrase” to the target audience in creative ways.
- Keep the description/explanation of the idea focused and simple.
- Identify the main message and repeat it over and over.
- Be sure the message has wide range appeal.
- Beware of mixed messages. A mixed message will confuse the audience.
- Make the targeted audience respond (i.e., think, smile, or cry).

CATEGORIZING NonPARTICIPANT

Typically, member participation recruitment requires knowledge, commitment and good interpersonal skills. Equally as important, recruiters must recognize and understand the source of reluctance in non-participants. There are various reasons why individuals refuse to participate as union members. But, regardless of their protests, very few would find having a “say so” about their working conditions objectionable.

There are six categories which characterize non-participants: **Cynic**, **Terrified**, **Professional**, **Busy Bee**, **Short-timer**, and the **Ignored**. The following information will arm you with insight on how to identify non-participants, then approach them with good techniques to get them involved:

Types of non-participants and the best responses to their objections.

1. THE CYNIC

This is perhaps the toughest group with which to work. Though people will rarely come right out and tell you, in their opinion and their thinking, involvement in the union cannot make much of a difference. Cynics tend to be non-communicative and may even appear disinterested. Unlike “professionals” (see below), they usually will not contest either your arguments or the benefits of union participation.

Best response examples:

- CSEA has already made a difference (i.e., low wages and poor working conditions before CSEA). Use a prepared sheet showing union gains over the years, point out how CSEA protects individual employees from arbitrary acts by supervisors.
- Whether or not they become involved, CSEA is negotiating on their behalf. If they do not support the negotiating team, our strength at the table will be compromised. The result will be a weaker contract with which everyone in the unit will have to cope. Put more strongly, apathy may end up costing them much more than the contribution they make in the form of dues.

2. THE TERRIFIED

This person is similar to the cynic in the sense he/she is apprehensive about the effectiveness of the union, but with the added element of fear. They are afraid of being victimized by the administration for supporting the union.

Best response examples:

- Reassure them through your expertise.
- Highlight CSEA’s record on unfair labor practice charges, grievances, appeals, and legal defense.

- Explain that the collective bargaining law prohibits the employer from terminating, harassing, or discriminating against an employee for union participation.
- In unity there is strength. A strong, effective union discourages the administration from taking arbitrary and illegal action against an employee.

3. THE PROFESSIONAL

Elitist ideologies of one form or another seem to be pervasive throughout a sector of the employee community. Do not waste time on the hardened professional: people who are really argumentative and feel that unions, for whatever reason, are “inappropriate” and they belong only because they have to. Concentrate instead on those who recognize a role for collective bargaining, but express reservations about “restrictive” or “inflexible” union rules. Others may even endorse the idea of unionization, but are reluctant to support militant or adversarial postures.

Best response examples:

- CSEA is a union that recognizes and strives to preserve intellectual freedom, dignity and autonomy on the job.
- CSEA contracts are not designed to produce conformity, but to make the employer more accountable while recognizing valuable employee contributions.
- CSEA provides a collective bargaining vehicle for responding to an increasingly unresponsive and, at times, intransigent employer. Strikes and job actions are viewed as a weapon of last resort to be used only when all other remedies have been exhausted and with the support of the majority of unit members.
- We really need someone with your background to help us in the area of professional growth.

4. THE BUSY BEE

This individual supports what the union is doing, but pleads lack of time to participate.

Best response examples:

- CSEA is so varied there's something for everyone. You can devote as little or as much time as you desire.
- Perhaps you could be our telephone tree coordinator. You can do this at home. Or our sunshine chairperson, etc.
- It's been said, “If you want something done, give it to a busy person.” We've found this to be true. Busy people understand the importance of getting the job done.

- There are many ways you can assist without having to spend a lot of time away from home. You can even share babysitting with another member.

Define social, and other jobs that don't take a great amount of time—perhaps an hour or two a month.

5. THE SHORT TIMER

These people recognize the value of unions, but are hesitant to get involved because they do not expect to be around much longer. Some indicate that they are planning to leave at the end of the quarter or over the summer. Many are confident that they will be landing another position in the near future. Others are part-timers with little stake with the employer.

Best response examples:

- Given the depressed state of the job market, they may be occupying this position longer than they expect.
- Most employees are uncertain about their futures. Many have joined the union to win greater job security and otherwise make their current position more attractive.
- We have held a lot of retirement parties for “temporary” employees.
- For those who emphatically insist that they are leaving, appeal to their sense of altruism and solidarity.

6. THE IGNORED

These are the individuals who have, for one reason or another, never been asked to participate. When asked why it took so long for them to become members many people say it's because “I was never asked.” The same is true with the subject of getting involved. In many cases employees will sign up to help if they are given information about how they can help their CSEA chapter. Don't repeat the common mistake of explaining all the benefits of involvement then forget to ask “Will you help?” Always complete the pitch with that question.

- *Just ask!*

CONVERTING A FAIR-SHARE PAYER

This module was originally designed to assist chapter leaders in the recruiting of new members. In the old days, chapters were encouraged to schedule a membership drive once a year. This module was made available to assist with that effort.

Today when we talk about recruiting we might be referring to any number of efforts. For instance, chapters actively recruit site representatives, job stewards, Victory Club members, volunteers for phone banks, and new leaders. Other recruiting efforts are aimed at converting service fee payers to CSEA members. Recruiting is an on-going effort in every chapter for a variety of reasons. The techniques for recruitment remain the same, regardless of the purpose.

Employees in every chapter have the same reasons for not being active in that chapter. The responses provided in this module will help the recruiter answer the questions posed by the potential member or activist in a non-judgmental way that also encourages participation.

While sections of this module refer specifically to “non-members”, many of the responses will help a recruiter convince a non-participant to become more active in CSEA.

Typically, a service fee payer believes he/she is already a member of CSEA because money is being deducted from his/her paycheck. Recruiting the service fee payer becomes a simple matter of explaining to the employee that in order to take advantage of the benefits of membership, an application must be on file. The recruiter can provide the membership application and sign up the new member immediately.

In a few instances, the service fee payer will not be interested in becoming a union member. The recruiter can share the benefits of membership with an emphasis on voice and vote within the chapter. This will generally be sufficient motivation to sign the membership application.

OUTLINE FOR A SUCCESSFUL MEMBERSHIP UNITY PROGRAM

The following is a step-by-step campaign to increase/activate membership.

1. ESTABLISH A CHAPTER MEMBER UNITY PROGRAM (MUP) COMMITTEE.

- Draw from leadership, site representatives, stewards, committee people, etc.

Depending on the size of the committee, up to five of them will attend two and a half days of training.

- Designate a coordinator. Keeping in mind that this committee may function during the change of chapter officers in December/January. Attending the training session is imperative for the committee coordinator.

2. IDENTIFY ISSUES

Identify issues that affect members in your chapter. This process may be started before the MUP committee is established. The chapter executive board may choose to engage this issue identification process for several reasons, i.e., preparation for contract bargaining, unresolved pending grievances, school board actions or elections, legislative measures and etc. The staff representative assigned to your chapter and the staff organizer will provide assistance as needed.

➤ **Methods**

1. Survey
2. Consensus
3. Grievances/unfair labor practices
4. Bargaining history

➤ **Examples of Issues**

(Some issues are more suitable for activating the members than for membership recruitment. Other issues may divide the chapter membership.)

1. School board elections
2. School board action
3. PERS issues: buyout, sick leave compensation
4. Collective bargaining contract
5. Bargaining rights
6. Federal, state, local revenue

7. Career issues
8. Economic benefits
9. Accomplishments
10. Political campaigns
11. Bus safety
12. Community coalition building
13. Workload/understaffing
14. Entry standards
15. Work place safety

3. SELECT THE ISSUE(S) AND DEVELOP A THEME. SOME EXAMPLES OF THEMES ARE:

- Power in numbers
- Strength at the bargaining table
- Members United Promote Strength (MUPS)
- Protect workers rights, a right for one is a right for *ALL*.

4. DESIGN AN INCENTIVE PROGRAM.

Incentive programs will reward and motivate chapter members to work toward the MUP goal whether it be signing up new members, completing one-on-one contacts in a timely manner or bringing new people to a general meeting.

- Offer recognition for the work site and/or member who signs up the largest percentage of new members.
- Develop charts, flyers and news articles reporting on the status of the drive.
- Consider an annual award to the member who signs up the greatest number of non- members.

5. IDENTIFICATION OF THE TARGET GROUP IS ESSENTIAL.

Basic to any membership drive or member education (activation) drive is a complete list of names, addresses, home phone numbers and work site of every member of the bargaining unit.

- Do whatever is necessary to create good, usable lists which include all classified employees. This list is available through your district office.
- It is important to have a separate list of members from which you can recruit volunteers. This list is available from your chapter treasurer.
- Create a list of nonmembers for use in your phone bank operations as well as any letter writing campaigns.

- Update these lists and correct phone numbers through the use of phone books, directory assistance or commercial matching services.

6. ESTABLISH THE TIME LINES

Dates for completing each segment of the campaign. Make your calendar as specific as possible.

SAMPLE CALENDAR

Phase One

Establish chapter organizing committee.

1. Meet with chapter executive board, labor relations representative, organizers, other staff.
2. Discuss overall strategy.
3. Set goals and plan strategy for canvass of the issue (phone bank/ letters/ follow-up).
4. Discuss preparation/content of a survey, if one is to be used.
5. Breakdown bargaining unit membership according to canvass structure and identify gaps (list site representatives and/or others on site-by-site basis).
6. Check problem areas.
7. Suggest individuals who may serve as coordinators of groups of 10 or more sites.

Phase Two — Education

Recruit volunteers/site reps and prepare canvassing materials.

1. Contact site representatives/job stewards (at their regular meeting or special meeting, contact by phone at home or at school); also consider committee people, officers and volunteers.
2. Provide a general introduction to the program.
3. Identify site representatives/volunteers/job stewards.
4. Set and inform all involved of training session date(s).
5. Prepare canvassing materials:
 - a. Leaflets (enough for each person to be contacted in their school or department)
 - b. Petition (if any)
 - c. Fact sheets
 - d. Membership recruitment materials
 - e. Canvass instructions
 - f. Q and A sheets
 - g. Stickers, buttons, etc.
6. Prepare record sheet file folder (one sheet for each site representative /volunteer/job steward)

Phase Three — Education

Same activities as week two above, except make follow-up calls for training sessions.

Phase Four — Volunteer Training

Conduct site representative/volunteer/job steward training sessions.

1. Local coordinators meet with site representatives/volunteers/job stewards as a group or individually to:
 - a. Review their jobs
 - b. Recheck information and dates of canvass (phone bank, letters, etc.)
2. If there is any problem it should be reported to the organizing committee coordinator.

Phase Five — Phone Banks

Canvassing begins.

1. Review instructions for phone bank volunteers.
2. Follow-up calls or site visits.
3. Inform organizing committee coordinator of progress and/or problems.
4. Check and double check with site representatives/volunteers/job stewards for progress and/or problems.
5. Send out follow-up letters, membership applications.

Phase Six — Phone Bank

Canvassing continues.

Phase Seven —

Begin Four-Week Follow-up Program

Follow-up and evaluation of program.

1. Continue sending out letters, making follow-up phone calls, making site visits, one-on-one site meetings.
2. List positive and negative aspects.
3. List Victory Club growth.
4. List possible new site representatives/volunteers/job stewards.
5. Complete evaluation forms.
6. Update member and nonmember data base.
7. Evaluate and reward all who worked on program.

ACTIVISM

“It is generally acknowledged that almost every improvement in the condition of working people was accomplished by the efforts of organized workers through concerted action. The welfare of workers can best be protected and advanced by their united action in a labor organization that advocates basic ideals and goals that coincide with their own.”

— from the Preamble of the CSEA Constitution

Power

- Power simply means the ability, whether physical, mental, or moral, to act.
- Unions can only achieve their goals if they possess enough power.
- Union power requires democracy and activism. We need active members to be strong. Members won't stay involved if they do not have control of the union's program.
- The worksite (not San Jose, not staff, not just the chapter meeting) is the starting point for union democracy and activism.
- Rules alone cannot guarantee democracy. Although rules are important, members must acquire the habit of being active and in control.
- Working people are competent and qualified to run their own affairs. Members are qualified to make choices and establish their own goals and the means to achieve them.

Democracy

- A union will act in the interests of its members only if those members control the union.
- The power of the union is in the level of member participation—the level of their activism.
- Even well intentioned leaders and staff can accomplish little or nothing without member participation.
- A union run by members is more likely to figure out solutions to problems.
- Because of the practice and experience of doing so.
- Because as members learn from and correct their own mistakes, they are better able to avoid them.

Business Unionism (Service model) v. organizing (a review)

- Business unionism or the service model:
 - operates to deliver representational services to members.
 - implies paying dues is like hiring a lawyer, someone to do it for members.
 - pretends to offer members “easy, effortless results.”
 - if unsuccessful, invites members to look for a “new, improved service provider,” i.e., decertification.
- Organizing:
 - requires that members be active on their own behalf.
 - requires that members are organized and involved.
 - does not operate well in a “top - down” environment.

What democracy and activism looks like

- Members look to the union for the power to deal with the boss, the community, and politicians.
- Members decide how the union deals with these forces.
- “The Union” is “We” not “They.”
- Issues and options for dealing with them are discussed openly at the worksite.
- Decisions are made openly.
 - Mechanisms exist for issues to be voiced.
 - Decisions are made openly, in the forums established for that purpose (such as executive board meetings or membership meetings).
 - Expressions of dissenting views, and organizing to promote them, are encouraged.
- Leaders and members are strongly linked.
 - Leaders act in the interests of members.
 - Members easily organize themselves, without waiting for marching orders.
 - Members move easily into activist and leadership positions.
 - Leaders encourage participation and help new leaders to develop, and there are many sources of leadership.
 - The members trust the leaders and the leaders trust the members.

- In other words, members take responsibility and act on their own.
- The best place to see whether or not these things are happening is at the worksite:
 - How are job issues, grievances and contract terms handled?

Making worksite culture a union culture

- Union democracy at the work site means that unionism is part of what people do at work each day.

(EXAMPLES)

TYPICAL INCIDENT	SOLIDARITY RESPONSE
New employee at site	Members recruit him/her into union
Employee attacks union program	Members engage him/her, instruct, listen

- A union culture at the work site can be built using simple organizing techniques like those taught at Member Unity Program (MUP) or Site Rep or Steward Training.
 - The union grows where members gather.
 - Members gather every day at the worksites. It is here where informal discussion of union programs and strategies take place.
 - We should vigorously defend the members' right to express their opinions at the work site.
 - We must also encourage the means.
- Good discussion depends on good information.
 - Is union literature available at the work site or just at members homes?
 - Are copies of contracts, grievance updates, constitution and by-laws, legislative updates, and members benefit information available at the work site?
 - Is there a trained, knowledgeable union activist at the work site to provide information and listen to questions and opinions?
- Chapter leaders
 - Find natural leaders at worksites, in departments, among formal and informal work groups. Recruit them as Site Reps and Stewards.

- Make informal site visits for organized discussions of what’s happening, and what the union should be doing.
- Encourage a free sharing of different points of view.
 - Free and open debate encourages broader involvement.
 - The more minds we can engage — the better the chances of discovering imaginative solutions to problems.
- Without real, open and informed discussion — where people work —there cannot be a proper level of democracy and activism.

Who’s a leader?

- Leadership is far more than being an officer.
- Leaders are people who help us make sense of things we might not completely understand.
- Leaders need a combination of knowledge and vision, applied to members’ concerns.
- Leaders have proposals to solve problems and the guts to see them through.

Above all:

- Leaders have followers.

What Does a Leader Do?

Works	Provides Direction	Motivates Others
Fights	Reacts to Events	Brings Together
Guides	Negotiates	Promotes Others
Campaigns	Facilitates	Models Behavior
Clarifies Issues	Takes Heat	Cares
Supports Others	Informs Others	Takes Chances
Investigates Issues	Educates Others	

Leaders should lead

- Since leaders are more active than average members, they’re likely to be more knowledgeable about issues.
- Leaders spend more time thinking about strategies.

- Sometimes, leaders may have different points of view than members on many questions.
- Leaders don't just announce the results of member surveys.
- To provide members with real alternatives, it is important for leaders to actually lead.
 - Sometimes, leaders must step out front to argue for what they believe is the best course of action, even if members don't currently agree.
 - Leaders inform, debate, persuade.
 - Leaders seek to win over the membership before committing to a course of action.

Linking Members and Leaders

- Leaders need active members, and that gives members control over leaders.
- Membership input should be based on good information.
- Moving from membership to leadership should be fairly easy.

Promoting involvement in the union

Activism most naturally starts with the reason workers organize into unions in the first place—it's the only effective way to negotiate a good contract and deal with the employer on a day-to-day basis.

CONTRACT NEGOTIATIONS

- Formulating demands and setting priorities
 - Use surveys to encourage member input — use the one-on-one approach.
 - Use flyers and meetings to discuss the relative importance of different issues.
 - Focus and prioritize bargaining demands.
 - Balance necessity of winning the issue with the probability of winning the issue.
- Include rank-and-filers of the bargaining team.
 - Balance experience with including new members.
 - Work to improve the connection between the bargaining team and members.

- Engage in open bargaining.
 - It's easy to spot service model/business unionism wherever members accept the idea that what happens at the bargaining table is "confidential."
 - **THINK**—Do information "blackouts":
 - keep the rank-and-file in the dark?
 - keep upper management and the school board in the dark?
 - Closed bargaining only reduces members' involvement with negotiations.
 - Closed bargaining isolates leaders and the bargaining team from the members.

- The Contract Campaign
 - You can't win in the peace treaty (the contract) what you can't win on the battlefield (contract negotiations).
 - The contract is not the result of the work of clever and eloquent bargainers.
 - Good contracts are the result of members' organization and resolve.
 - The members' willingness to act for what they believe in provides the necessary pressure to win at the bargaining table.
 - Your local organizer and LRR can help you plan and execute an effective Contract Campaign using the tools and techniques you've learned at MUP training.

- Open and Informed Ratification
 - Ratification is the most important election.
 - Make sure members know what they're voting on.
 - Provide sufficient time for informed member-to-member discussion about the TA.

Why members don't participate

- **Big Problem: Apathy.** How can the members run the union if they won't get involved?
- Progressive officers may find yourselves up against years of training in the passive "let the experts handle it" or service model/business unionism.
- Members, over time are actually taught and believe that "We/I don't make a difference."

- They experience the same people doing the work, and getting reelected. There seems to be “the union group” and they’re not a part of it. They may never get sincerely invited to belong. Without meaning to, the union has caused the members to feel powerless, by operating in the same old tired way. Members have no reason to get involved.
- Individuals feel they don’t make a difference. They think they, alone, are insignificant in terms of the whole group. They know their time and energy is important, and easily convince themselves that their lack of participation doesn’t matter because others will do the work. What if every member felt that way?
- The guilt trip lecture “see how hard we work for you” approach by officers does not work.
- Members get involved to get power against the boss, if they see real results. They get involved if they believe it might be fun.
- Things that make it hard to participate need to be eliminated.

Why members do participate

Here are some ways to make involvement more satisfying:

- Accept and encourage initiative.
 - Know that it’s hard for most people to volunteer.
 - Initiative of any kind should be respected, taken seriously, and publicly acknowledged.
 - Make it as easy as possible for members to attend events.
 - Make sure that language that belittles any group of members is out of bounds in the union or work site setting.
 - Include families in activities.
 - Remember members when they are sick and recognize key life events.

You have to ask

- If you want people to get involved you have to ask them — personally.
 - A member is much more likely to say yes if she thinks her presence counts to someone she respects.
 - Match the task you need help with to the person.
 - People are much more likely to say yes when the tasks are specific, clearly do-able, and rewarding.

VOLUNTEER RECRUITMENT

Some tips on making contact and approaching volunteers

The first secret of recruiting is good planning. Start by making a list of the committees and activities for which you need volunteers. Figure out when and how you will recruit them. You'll also find it helpful to have an idea of how you want to approach people and what you will say. Think about making up a flyer about the issue(s) your chapter is working on, and include a “tear off” volunteer form at the bottom of the flyer. Give potential volunteers a choice of tasks (phone calls; petitions; bulletin boards; cooking food; providing child care; etc.)

Finding volunteers

- **Networking**—As you recruit new volunteers, ask them to commit to recruiting one co-worker.
- **Site Representatives/Stewards**—If the chapter has these positions, kick in the “one-on-one” contact system. Make each officer, site rep and steward responsible for getting one volunteer by a certain date.
- **Phone Banking**—Use initial volunteers (people you know and Site Reps/Stewards) to call members.
 - Develop a phone script to appeal to targeted potential volunteers
 - Develop a plan to recruit the necessary number of volunteers.
 - For every 100 calls = 50 contacts = 5 confirmed volunteers.
 - One caller can make 12 completed calls per hour.
 - Each caller, working a three-hour shift, completes 36 calls per shift.

Utilizing this formula, you can determine how many callers are needed.

- **Ghosts from the Past**—Ask all chapter leaders and activists if they remember anyone who volunteered for a past CSEA activity, but has since become inactive. Get a hold of these potential volunteers and ask them if they would be willing to help again.
- **Bulletin Boards**—Put the flyers you’ve created on all bulletin boards. Be sure the tear-off form has a return name and address or work site.
- **Occupational Leads**—Does someone in the chapter perform the functions for the employer that would be useful to our campaign. Some members may also have hobbies like cooking, photography, cartooning, etc. Ask them if they would be willing to lend their talents to the union.

- **Mail**—Where you can, use the district mail system to distribute the issue/recruitment flyer.
- **Meetings/Events**—do campaign activities, like making picket signs or signing petitions, at all chapter meetings, site meetings, etc. Explain your need for volunteers and put issue/recruitment flyers or sign-up sheets out on a table. You can also utilize social functions, benefit fairs, etc.

Approaching potential volunteers

- **Understanding Motivations**—People volunteer when they have a good reason to do so and a reasonable expectation of being successful. Try to find out what issues/activities they're "hot" about (pay cuts, transfers, layoffs, etc.) or what interests they have (drawing, cooking, etc.), then capitalize on those motivating factors.
- **Emphasize Emotional Flashpoints & Rewards**—When "pitching" potential volunteers, try to stir up their anger, passion and sense of justice. Talk about what their involvement would mean to CSEA — what a big help it would be. Try to develop some common interest/bonds. Get them excited and give them a sense of the union's spirit and solidarity. And by all means, make the activities sound like fun — not tedious work.
- **Overcome Reluctance**—If someone seems interested in helping, but they are still holding back, try to find out why. Perhaps they think they don't have the talent. Perhaps it's a child care problem. If you can, try to help them overcome these obstacles.
- **Start Small**—Often, people who are new activists are worried about how well they'll be able to do the job. Start off by asking them to do relatively easy activities that they like, feel comfortable with, and can succeed at. Find tasks that are suited to their talents and be sensitive to their time constraints.
- **Go Easy**—Sometimes people who have never been active are leery about how much time is involved in volunteering, what assuming a "title" means. Listen for these cues and adjust your "pitch" accordingly. For example, if someone seems afraid of the title, rather than asking them if they would like to be the "site representative," ask them if they would be willing to help you distribute a flyer at their site. Then gradually add responsibilities and build from there. Take your cues from the volunteer, and be careful not to overwhelm them or push too far, too fast.
- **Mentor**—Assign experienced leaders to help new recruits. That way you let potential volunteers know they won't be "on their own," but rather, helping out a leader. Leaders can provide

SAMPLE REWARD LETTER FOR VOLUNTEERS

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear _____:

Thank you for participating in CSEA Chapter 123's successful membership recruitment drive.

Because of your help, CSEA and Chapter 123 continues to grow. This helps all of us in the bargaining process.

As chapter president, I am pleased that you are one of our WINNERS!

Please return your preference of prize to me. Your gift certificate will be forwarded to you.

Thanks again for all your help.

Sincerely,

Mary Jones, President

CSEA Chapter 123

Return to Mary Jones via school mail or your site representative.

_____ The Movies _____ Disneyland _____ Catalina

_____ Albertson's _____ Conroy's _____ Magic Pan

(Signature)

(Date)

(School/location)

DEVELOPING LITERATURE AND RECRUITMENT PACKETS

Developing literature

Introduction

The one-on-one approach is the most important way to educate and recruit members; however, written communication is a strong second and a great back-up for verbal communication.

Your chapter will have many opportunities during your MUP campaign to develop literature for distribution to the bargaining unit members. Announcements for the next chapter meeting, grievance updates, negotiations updates, know your rights flyers and member updates (marriages, births, deaths, retirements, birthdays, new employees, new CSEA members) all provide great opportunities to advertise via flyers and leaflets.

How to write a flyer/leaflet

Decide exactly what you want to do and say and who you want to reach. This will help you in the initial layout phase. **Determine your target audience. Your target group could be: the whole chapter, one job classification, one work site or one work shift.**

RULE 1: Keep It Simple! Readers decide at a glance whether or not to read a flyer, so make sure that your flyer is easy to read and has an interest to the reader. The best flyers have a catchy headline, three or four points and a concluding ending. Don't use jargon or unfamiliar language. Use only one side of the paper.

RULE 2: For flyers announcing events or festivities, be sure to include the four Ws. **What** the event is; **Where** it will be, **When** it will be (date and time) and **Who** is sponsoring the event.

RULE 3: Indicate clearly what readers can do about the situation the leaflet describes. For example, if you need strength at the bargaining table, urge the reader to join CSEA. If you want the reader to attend an event, tell the reader to "Be sure and attend."

RULE 4: Use one central theme per leaflet.

RULE 5: Write from the point of view of your bargaining unit members. Use "we" and "us" rather than "you." Instead of "CSEA is the union for you," say "With CSEA we've made our jobs better." Reinforce that the employees are the union.

RULE 6: Remind readers of your long-term goal. Remind them that the overall goal is to build a strong chapter in order to fight more effectively for improvements on the job.

Where to get information!

- Chapter Reporters (CPROS) are sent the CSEA Clipsheet in the mail on a monthly basis. CSEA Clipsheet is available at *www.csea.com* in the library section. You will be able to access ready made information at that location.
- Members in your chapter.
- CSEA module(s).
- Other internet locations.

Recruitment packets

Recruitment packets are best used after one-on-one contact has been made with the employee. If you can “tailor-make” a recruitment packet, you have a better chance of the material being read and possibly recruiting a new member.

During your phone bank, be sure to have the responses of the unit members recorded accurately. If Carl Custodian expresses an interest in retirement, tailor his follow up packet with information on pre-retirement planning and the benefits and services CSEA offers retirees. If Susie Secretary likes the idea of discounts to Disneyland, her packet should revolve around Member Benefits.

If you are unable to make contact with the unit members before creating a recruitment packet, an all-encompassing packet can be used, but choose the material carefully. Don't overwhelm the potential member with too much information. It is best to use brochures that are descriptive but not too detailed, so that the potential member will be interested in seeking out more information. Some brochures available from CSEA which are great for recruitment packets are:

- *What is CSEA?*
- *CSEA Insurance Programs*
- *CSEA Wrote the Book*
- *It Pays to Join CSEA*
- *CSEA Guide to Financial Planning*
- *Member Benefits Guide*

Don't forget to include your chapter leadership's names and telephone numbers and a membership application.

Your recruitment packet should also include a cover letter from either your chapter president, your membership chairperson or your MUP chairperson. The letter should stress the importance of membership in CSEA, the goals the chapter wants to accomplish and an invitation to attend the next chapter meeting (with the date, time and place).

THE ADVANTAGES of CSEA Membership

What Members Get

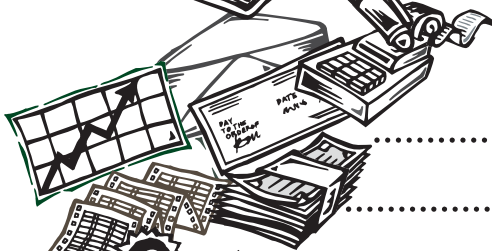


\$5,000 Accidental Death Coverage



Free legal advice on personal matters

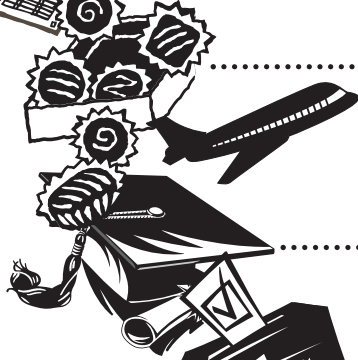
Annual member benefits guide and chapter newsletters



Credit union privileges — including Visa cards and free checking

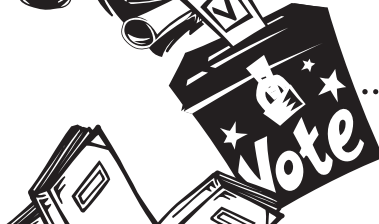
Retirement planning services

Discount buying, including cars, computers, etc.



Discounts on tickets including Disneyland, Knott's Berry Farm, movies, See's Candy, water parks, travel and much more!

College scholarships and grants for members and their children



Voting rights on all tentative contract agreements with management



Representation on contractual, disciplinary, DMV, unemployment and all other work-related issues

What Non-Members Get



Representation on contractual issues only



California School Employees Association

Action word(s)
in headline

Stop 18% Pay Cuts To Unit "D"!

On Monday (July 20) the Board of Education will direct the superintendent how to negotiate with the unions on the pay cut issue. Obviously, this will largely determine what the district proposes at the bargaining table.

Right now, there are two types of cuts being discussed:

- Pro-UTLA board members are pushing cuts that would benefit teachers at your expense.
- We're pushing for a solution that is more equitable — basing cuts on hourly wages so classified employees aren't hit as hard.

Give reader something to do

The teachers are flooding the board with calls. We MUST do the same so our message doesn't get lost.

We need your help now! We have to convince the board by Friday (July 17) at 5 p.m. that the hourly cut idea is more equitable. Be sure to ask that your message be included in the "weekend packets sent to the board" to guarantee the board gets it before Monday's meeting.



**Call
Your Board
Member Now!**

Add a graphic

Tell the school board:

- You're tired of being singled out to take the hits.
- You want equitable treatment.
- Most importantly, tell them you support the hourly pay cut idea.

You can fax your message to (213) 626-2815, or call:

Leticia Quezada (213) 625-6383
 Mark Slavkin (213) 625-6387
 Barbara Boudreaux (213) 625-6382
 Jeff Horton (213) 625-6386
 Julie Korenstein (213) 625-6388
 Warren Furutani (213) 625-6385
 Roberta Weintraub (213) 625-6180

(Turn over for details on the 18% pay cut and contract negotiations)

Develop a theme

WE'RE FIGHTING FOR YOUR JOB!

CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION 

Our actions won a fair agreement from the district

Nearly 60 percent of our unit turned out Monday night to vote on the contract proposal. When the meeting was over, we voted in favor of the proposal 372 to 123 because, unlike the last agreement, this one was fair.

We forced the district to give us a fair agreement by our actions—like wearing our union buttons, calling school board members and challenging the district on its budget figures and on the illegal actions it had taken.

HERE IS WHAT WE WON:

- 3.56 percent raise retro to July 1, 1994;
- 1.56 percent one-time salary bonus; and
- A collective cap on the district's contributions to health care costs through the life of the contract; as long as overall costs do not exceed the overall cap, employees will not have any additional out-of-pocket expense.

WE'LL TAKE 3 ACTIONS TO SOLIDIFY OUR STRENGTH

We still have work to do to assure that we continue to be treated with respect and dignity. The following are actions we'll take:

- Elect school board candidates who support us;
- Prepare for the 1995-96 contract reopeners; and
- Hold administrators accountable.

For information about our endorsed school board candidates, contract reopeners or how you can get involved to help with these actions, call CSEA Lodi Chapter 77 President Pat Calonge at 333-7648.



AFL-CIO

**WE TOOK A STAND.
WE WON RESPECT ... WE WON DIGNITY.**

Lodi Chapter 77 • California School Employees Association

These candidates will help create a positive work environment

CSEA endorses four candidates who are committed to helping us provide a better education for Lodi's children

- Ron Heberle for trustee in Area 5
- Norm Mowery for trustee in Area 3
- Timothy J. Thompson for trustee in Area 4
- Debbie Lauchland Woehl for trustee in Area 1

The internal strife between management and employees in our school district has got to end before it has a serious impact on our ability to improve our schools. Your CSEA executive board is committed to doing whatever is needed to end the acrimony while protecting classified employees' rights.

To this end, your union interviewed 12 school board candidates and recommends these four candidates because they will work with us to create a positive work environment.

In a statement to the press announcing our primary reason for endorsing Mr. Heberle, Mr. Mowery, Mr. Thompson and Mrs.

Lauchland Woehl, Chapter President Pat Calonge said: "The biggest roadblock to increasing the quality of education we give our children in Lodi is the district management's insistence on pitting employees against each other. Far too often, this district's preoccupation with so-called labor relations problems distracts employees from what they really want to do each day—provide a quality education for our children."

Now the choice is yours. We urge you to support these four fine candidates for school board trustee—each of them is committed to helping us provide a better education to Lodi's children.



AFL-CIO

**NOW THE CHOICE IS YOURS ... CONSIDER THE ISSUES ...
BE SURE TO VOTE ON TUESDAY, NOVEMBER 8**

Lodi Chapter 77 • California School Employees Association 

FUNDAMENTALS OF A TELEPHONE CAMPAIGN

If we are to be successful in building our unions, chapters need to be involved in a phone contact program. Nonactivists need to hear from the union.

A phone program should be established as follows:

Telephone equipment

- ▶ Assess needs to establish setting for phone bank. Necessary arrangements should be made to coincide with campaign time line. Field office staff must be considered when using field office phones. Other location alternatives include political campaign offices, insurance company offices, etc.

Recruit volunteers

- ▶ Send a letter to each member outlining the unity drive—soliciting support. Using your membership lists and/or site representative structure, find volunteers to work on your Membership Unity Program (see sample letters at end of this section).
- ▶ Send all members a letter from the chapter president and/or executive board introducing the drive and asking for their assistance. They are setting the example by being the first to sign up to work in the Membership Unity Program. Even better than sending a letter, make a personal visit to the individual—alone.

Literature preparation

- ▶ All literature for the phone bank (i.e., issue identification and discussion pieces, telephone scripts, calendars, pre-phone bank mailings and follow-up mailings) should be prepared in advance of the actual program.

Educate members involved

MEET WITH THE SITE REPRESENTATIVES/VOLUNTEERS/JOB STEWARDS WHO WILL BE INVOLVED IN THE MEMBERSHIP UNITY PROGRAM.

- ▶ Plan a breakfast or luncheon meeting. Present an overview of the Membership Unity Program.
- ▶ Hand out kits that contain membership/activist information.
- ▶ Introduce incentive program as developed.
- ▶ Stress the importance of the one-on-one approach.

Educate the nonparticipants

- Nonparticipants should receive literature dealing with the unity drive at least once a week before and during the campaign.

Note: To expedite bulk rate mailing, check with your post office. Call local postal union for help.

- A letter from chapter president and/or executive board should be sent to each nonparticipant immediately before the phone bank.
- Nonparticipants should not be called until they have had a chance to become informed on the issue(s) of the unity program.
- An article in the chapter newsletter is also advised.

Training volunteers and monitoring phone banks

- Before calls are made, volunteers need to be thoroughly instructed.
- Make sure volunteers are equipped with:
 1. Instruction sheet
 2. Scripts
 3. Pencils
 4. Call list
- A good method is for the phone bank coordinator to make the first few calls and let volunteers observe the techniques. The coordinator needs to monitor the calling carefully at all times.

Telephone script

- The first series of calls are to identify “supporters” or “negatives” or “undecided.” Code each call (+), (-), or (?) respectively on your tally sheet.
- The best calling hours are:
 - 1 Weekdays — 5:00 p.m.–8:00 p.m.
 - 2 Saturdays — 10:00 a.m.–6:00 p.m.
 - 3 Sundays — 1:00 p.m.–8:00 p.m.
- Approximately 10 to 12 calls can be completed in one hour (assuming a two-minute phone script). Examples of letters and scripts are at the back of this section.

Send follow-up letters

Letters should be sent to the homes of each nonparticipants reached by phone. These letters should be sent out after each day's calls.

Monitor the program

- Call site representative/volunteer/job steward to see how they are doing. Offer assistance if needed.

Note: Not everyone is comfortable selling activism, but a unity drive provides site representatives with a reason for talking to every non-participant in the building.

- The daily tally sheet—This sheet will provide you with important information about the strengths or weaknesses of a unity drive, and for follow-up membership education among nonparticipants. The daily tally sheet also serves as an incentive for the next night's phone volunteers.
- Weekly tallies—Every week of the drive, make and post an analysis and recording of the program's activities. It is essential everyone be kept aware of the progress and measurement.

Follow-up visits

Site representatives must make follow-up visits to contacted non-participants to insure questions are answered and/or the desired outcome is reached.

Make the recruitment campaign a repetitive event until you have 100 percent sign-up

Telephone pitfalls—be aware!

Telemarketing has reached into every recess of our world. As a community we are contacted by phone for every conceivable sales pitch. The population has purchased message machines in part for the purpose of screening unwanted phone calls. Phone banking as we use to know it is no more. In order to keep the phone bank success rate high, we want to alert you to some of the pitfalls. (Techniques for avoiding telephone contact pitfalls should be discussed at training.)

- Invasion of privacy. Some unit employees will be unhappy that the union has their home phone number.
- Time is inconvenient.
- Employee needs to vent and complain. Employee will want to have a long discussion of their personal agenda.
- Employee may be anti-union.

- Children consistently answers the phone.
- Reading a phone response.
- The useage of *69.

The most effective phone banking structure...

is one that is centralized where enthusiasm can be created and people are available to answer difficult questions. There are times, due to lack of facilities or geographic considerations, where phone banking from home is needed. When this occurs please follow these guide-lines:

- It is very important that you select people who will follow through with the phone calls. Home phone banking can be difficult to accomplish due to family matters, etc. Choose carefully.
- Establish phone banking evenings for everyone involved. Let them know you will contact them the next day to find out how many calls they were able to complete and what the responses were. Follow up and call them the next day. If a home phone banker is unable to complete calls for more than one night you may have to reconsider them as part of the phone banking effort. This is a tough call to make because even the best people can get sidetracked at home.
- Make sure to give these volunteers training in advance of their phone banking nights. Review the information in this section and use everything that applies to a home phone banker (times to call, number of calls per hour, script use, etc).

Only you and your committee can make the best decision on allowing home phone banking. Don't use it just because it sounds easier to give a list to volunteers to take home. Without the proper follow through it will become a non-event.

Instructions for Phone Bank Site Supervisor

1. Locate an appropriate site that has enough phone lines (not just phones) for your project. The site should have parking, be accessible to public transit if in an urban area and in a location that volunteers will come to at night.
2. Make arrangements for access to the site. Will someone be there to let you in? Will you have to pick-up a key or a security code? This is especially important for weekend phoning.
3. Recruit volunteers. Get a list from anyone else who is recruiting volunteers. Make reminder calls either the day before or the evening before your phone bank is scheduled to take place.
4. Prepare the phone bank materials, which should include:
 - Calling lists
 - Phoner tally sheet
 - Phoner script
 - Pens
 - Instructions for phoners
 - Phone bank supervisor's daily report
5. **Arrive early**, make sure the site is ready, prepare refreshments and greet volunteers. Refreshments are very important, even if you only have coffee and sodas. It sends a message that the volunteers are appreciated. It may increase the chances that volunteers will stay for the whole shift. On weekends if you run two shifts on the same day, some of the volunteers who came for only the first shift will stay, and continue to make calls if food is provided.
6. **Train the volunteers.** Review all of the materials, especially the codes on the calling lists and the tally sheet, so that the phoners correctly record the results of their calls. Do role playing. The role playing is very important for volunteers who are new to phoning. Help them feel comfortable.
7. **Continue to monitor the phoners throughout the shift.** Listen to what each one is saying. Check to see that each person is correctly marking the results of the calls on the tally sheet, and on the calling list. Work with those who need assistance. If needed, have a volunteer observe while you make some calls.
8. After the first half hour of the phone bank, call any volunteers who have not arrived. It is not unusual to find someone who forgot, even though they got a reminder call. If you call early enough during the shift they may still come over. At the very least, get the "no shows" to reschedule for another shift.
9. Continue checking on the phoners. Be their coach and their cheerleader.
10. When not assisting the phoners, make calls to line up more volunteers.
11. When a phoner is ready to leave, **review their tally sheet and calling list with them before they go.** Ask that they make any necessary corrections.
12. Before the phoner leaves, **schedule them for another phoning shift.**
13. Fill out the Phone Bank Supervisor's Daily Report. Fax or call in the results as instructed.
14. Make sure the place is clean, neat and all locked up.

Instructions For Phone Bank Volunteers

1. In addition to this instruction sheet you should have a call list, script, tally sheet and a pen. **Immediately notify your phone bank supervisor if you are missing anything.**
2. Before you begin phoning, **carefully review the materials.** Let the phone bank supervisor know if you have any questions about the script, how you are to mark the result of a call on the call list or how you are to fill out the tally sheet.
3. **Follow the script.** Do not take short cuts. The information in the script needs to be conveyed to get a solid commitment. However, try not to sound like you are reading a prepared message.
4. **Avoid long discussions.** If the person really wants to discuss issues further, offer that perhaps a chapter officer or someone else can follow-up.
5. **Do not argue** with anyone. Remain polite. Say good-bye and go to the next call.
6. **Mark the appropriate response code on the call list** to indicate the result of the call.
7. **Be precise** in how you code a response. We need an accurate assessment of how those who are being called are responding to our message.
8. **Mark your Phone Bank Tally Sheet** to keep a running count of your completed calls, as you are making the calls. (This is especially important if the list has been called before and there are already marks on the list that were made by another phoner.)
9. Even though you may be calling for another reason, if you speak with someone who is enthusiastic, **ask** the person to volunteer. There are many potential volunteers out there. They just need to be asked.
10. If you get an answering machine leave a brief message.
11. Be honest and **admit it if you cannot answer a question.** If the phone bank supervisor is available, see if the phone bank supervisor can take the call. If not, note the question and relevant information in the space provided on your tally sheet.
12. If someone asks how we got their name, tell them we are calling from a list provided by their chapter.
13. When you have finished please turn in you completed tally sheet, call list and all materials to the phone bank supervisor.
14. Please let the phone bank supervisor know when you can return to make more calls.

THANK YOU VERY MUCH!

Sample Telephone Script to Service Fee Payer

Hello _____, I am _____ calling from the _____. We are calling all the people we represent about negotiations.

Do you agree with us that _____ is worth our time and energy and that the _____ conditions here will be better for our efforts?

1. If yes or undecided to above questions:

_____ (name of chapter) feels these are important issues for all of us. There is strength in numbers-and by working together we can be a force in seeing that changes are made in these areas.

I know you are not presently a service-fee payer of our _____ (name of chapter).

Did you know that signing up as a member will not increase your payroll deduction, but will give you the benefits of CSEA membership?

If NO: CSEA membership allows you to vote on the contract, plus numerous savings offered through CSEA's member benefits program (refer to the benefits guide if necessary).

I'd like to invite you to join us as a member. Can we send you a membership application and consider you a member of our organization?

If YES: That's great. We will be in contact with you soon. Don't forget to send in the card. Thanks for your time. Good-bye.

If UNDECIDED:

We'll send you some material. We hope you'll consider joining us in the future. Thanks for your time. Good-bye.

If NO: Thanks for your time. Good-bye.

2. If NO (to all issues) ask:

What do you think are the important issues facing our colleagues?
(Listen to response and record, then thank them for their time and terminate conversation.)

Note: Since you have identified the important issues prior to making the phone calls, a "no" to all questions is not a potential joiner at this time. Asking them their view on issues is only a polite way to terminate the call. If you get numerous "no's" during the phone bank, you did not identify the right issues!

Sample Telephone Script to NonParticipants

Hello, I am _____ from _____ school.
I'm calling for CSEA Chapter _____.

- Did you receive a letter at your home from Chapter President Mary Jones? (wait for response)
- Do you have any questions or comments about the legislative outcomes? (wait for response)
- Also, in the letter, Mary listed CSEA's negotiation priorities. They are: revise and clarify job descriptions, insure health and safety of our VDT workers and to implement career ladders which would provide tuition reimbursement, create avenues for advancement and additional salary. Do you support these priorities? Do you have any questions or comments? (Note any relevant comments)

Chapter 123 executive board has developed an action plan to help achieve our contract priorities. The plan has three immediate components:

1. First, we will phone every member and service fee payer during the next three weeks to talk with them about negotiations. This means coming to the CSEA field office for two hours one afternoon and doing what I'm doing now. Could you help with this? (record response and schedule on phone bank chart.)
2. The second component is recruiting service fee payers to become members at your school. The more members the district sees on payroll deduction, the stronger we are at the table. Would you be willing to talk to service fee payers at your school about joining? (record response) (explain incentive program)
3. And the third component is helping on phone trees to call other classified employees at your school with negotiation updates during negotiations. Would you be willing to call a few fellow classified employees with a message from Chapter 123? (record response)

If they have volunteered for something, remind them:

1. We'll see you at _____ (time) _____, _____ (day) _____, the _____ (date) _____. — (phone bank)
2. Just send new membership applications to our chapter treasurer through the school mail. Be sure to print your name on the side. (recruit)
3. Someone from Chapter 123 will be in touch with you as negotiations proceed to ask you to call a few fellow classified employees. (telephone tree)

Thank you for your time, your membership and your interest. Keep in touch with CSEA Chapter 123 if you have any questions. Good night.

Sample Legislative Phone Bank Script

Hello, my name is _____ and I work at _____ school. I'm calling for CSEA Chapter _____ and I'd like to spend a few minutes talking with you about our PACE program and about the legislative alert that was just mailed to you.

Q1 *Did you receive the legislative alert that was just sent to you about SB 527 (Leonard)?*

If YES—Then you might recall that alert was to make you aware that Senator Leonard was proposing that beginning 1989–90 school districts spend 74 percent of all new revenue limit funding received for ADA growth and COLA on teacher compensation. (go to Q2)

If NO—I'll be sure to get another copy in the mail to you right away. As you will see Senator Leonard is proposing that beginning 1989–90 school districts spend 74 percent of all new revenue limit funding received for ADA growth and COLA on teacher compensation. (go to Q2)

Q2 *To implement this program, Senator Leonard must have a great deal of support. On the whole, would you say this is a program you would support for classified employees?*

If YES—Well, I hope you will take the time to read this literature in detail as we try to keep you informed about the impact this type of legislature would have on classified employees. Thanks for your time. Good night. (end here)

If NO—I'm glad to hear that you understand the problems that this type of legislature would present to classified employees if it would pass. There are many ways that you can help lobby to insure this legislature does not pass. One way is by making phone calls to other classified employees. Another way is by writing to the members of the committee hearing the information on this proposed legislation. (go to Q3)

Q3 *Would you be willing to either phone other employees or write a letter to help facilitate CSEA's lobbying efforts?*

If Yes— Great! Let me put your name down on the phone list for _____ (day) _____, _____ (time) _____ to make calls for 2 hours, or _____.

Great! I will put a sample letter in the mail to you along with the names and addresses of the members of the committee this evening. Thanks so much for your support and your time this evening. Good night. (end of call)

If NO— Well, I hope you will continue to read our literature as we try to keep you informed about this very important piece of legislation. If you find you might have time to help at a later date, please do not hesitate to call me or talk to your site representative. Thanks for your time. Good night. (end of call)

Sample Phone Bank Pre-Mailer

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear Fellow Classified Employee:

The California School Employees Association (CSEA) Chapter 123 has been your bargaining representative since _____ and has achieved many accomplishments for you. We have improved contract language, fringe benefits, working conditions and have increased salaries.

Here are some of our goals for the upcoming negotiations:

1. To revise and clarify job classifications
2. To insure the health and safety of our VDT employees
3. To implement career ladders which would:
 - a. provide tuition reimbursement
 - b. create new avenues for advancement
 - c. provide additional salary

Negotiations will begin soon and the more active our membership is, the better.

CSEA Chapter 123 feels these are important issues for all of us. We hope you will strongly consider helping CSEA at this time. There is strength in numbers and by working together with us, you can have a voice in the decision-making process. A CSEA Chapter 123 volunteer will be contacting you soon.

Sincerely,

Mary Jones
Chapter President
CSEA Chapter 123

Sample Phone Bank Post-Mailer (Service Fee Payer)

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear _____:

Thank you for taking the time to talk with one of our volunteers and agreeing to consider joining with CSEA Chapter 123.

Your support will help make us stronger at the bargaining table. Your membership boosts our efforts to enhance our professionalism and to advance our bargaining goals.

Within a few days _____ will visit with you to answer any additional questions you might have and to have you complete a membership application. Thank you very much for your support.

Sincerely,

Mary Jones
Chapter President
CSEA Chapter 123

Sample Volunteer Recruitment Letter

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear Fellow Classified Employee:

The California School Employees Association (CSEA) Chapter 123 has represented you very effectively at the bargaining table since 1971. We have made great strides and have overcome many obstacles. During our ____ years as your bargaining representative, we have improved contract language, fringe benefits, working conditions and we have increased salaries. We have one of, if not the best, classified employee contracts in our area.

Here are some of our goals for the upcoming negotiations:

1. To revise and clarify job descriptions
2. To insure health and safety of our VDT workers
3. To implement career ladders which would:
 - a. provide tuition reimbursement
 - b. create new avenues for advancement
 - c. provide additional salary

CSEA and Chapter 123 feel these are important issues for all of us. We hope you share our belief that CSEA is one of the strongest links in the educational chain and growing stronger every day. We hope you'll help us for the upcoming negotiations by assisting with our membership unity program in September. Prizes and special incentives will be offered. (Details on back.) A CSEA Chapter 123 representative will be contacting you.

Sincerely,

Mary Jones
Chapter President
CSEA Chapter 123

Sample Phone Bank—Negative Reaction

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear _____ :

Thank you for talking to one of our CSEA Chapter 123 volunteers recently. I certainly appreciate your thoughts and suggestions.

As you know, we need your membership support as we enter negotiations. I hope you will reconsider and assist our CSEA Chapter 123 soon.

Please contact me or your site representative if you need more information. Thank you for your interest in the classified service.

Sincerely,

Mary Jones
Chapter President
CSEA Chapter 123

Sample Phone Bank —Undecided

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear _____ :

Thank you for talking to one of our CSEA Chapter 123 phone volunteers recently. I certainly appreciate your thoughts and suggestions.

Negotiations will be starting very soon. Our budget analysis shows that the district can fund the salary and benefits proposal that you reviewed; however, I sincerely hope you decide to become a member at this critical time. The district reads membership and activism as support of our negotiation goals; and, of course, lack of membership or member activism as lack of support. I urge you to join with us now to support negotiations.

I welcome you as a CSEA Chapter 123 member and look forward to working with you. If appropriate: I hope you will complete the enclosed membership application and return it to me in the school mail as soon as possible. Please contact me if I can be of any assistance to you.

Sincerely,

Mary Jones
Chapter President
CSEA Chapter 123

Sample Phone Bank—New Member

(CSEA Chapter Letterhead)

Date

Name

Address

City, CA Zip

Dear _____ :

Thank you for talking to one of our CSEA Chapter 123 volunteers recently. I appreciate your thoughts and suggestions.

Negotiations will be starting shortly. Our budget analysis shows that the district can fund our salary and benefit proposal that you reviewed over the phone, and your membership and activism will help us by showing the district that you support those demands.

I welcome you as a CSEA Chapter 123 member at this critical time and look forward to working with you. If appropriate: Simply complete the enclosed membership application and return it to me as soon as possible. You may also give it to your site representative if you prefer. Please contact me if I can be of any assistance to you.

Thanks again for your support.

Sincerely,

Mary Jones
Chapter President
CSEA Chapter 123

Your help really does make a difference!

California School Employees Association

Phone Bank Data Sheet



Date: _____

Issue: _____

Issue: _____

Notes: _____

Response

Favorable Unfavorable

1 2 3 4 5

1 2 3 4 5

For CSEA Against CSEA

General Assessment: 1 2 3 4 5

Follow Up Needed: Yes _____ No _____ Written/Oral? Wrong Number

Nobody Home Disconnected/Off List Call Back

_____ Don't Call Back

Date: _____

Issue: _____

Issue: _____

Notes: _____

Response

Favorable Unfavorable

1 2 3 4 5

1 2 3 4 5

For CSEA Against CSEA

General Assessment: 1 2 3 4 5

Follow Up Needed: Yes _____ No _____ Written/Oral? Wrong Number

Nobody Home Disconnected/Off List Call Back

_____ Don't Call Back

Date: _____

Issue: _____

Issue: _____

Notes: _____

Response

Favorable Unfavorable

1 2 3 4 5

1 2 3 4 5

For CSEA Against CSEA

General Assessment: 1 2 3 4 5

Follow Up Needed: Yes _____ No _____ Written/Oral? Wrong Number

Nobody Home Disconnected/Off List Call Back

_____ Don't Call Back

Date: _____

Issue: _____

Issue: _____

Notes: _____

Response

Favorable Unfavorable

1 2 3 4 5

1 2 3 4 5

For CSEA Against CSEA

General Assessment: 1 2 3 4 5

Follow Up Needed: Yes _____ No _____ Written/Oral? Wrong Number

Nobody Home Disconnected/Off List Call Back

_____ Don't Call Back

SITE REPRESENTATIVE PROGRAM

Introduction

It has often been said “mother must have eyes in the back of her head,” meaning, of course that a mother sees everything.

Several years ago we noticed that chapter officers also needed more eyes and ears than a human being was designed to have. This was true of individual officers and of the elected leadership as a group. Elected officers needed to see and hear everything that was going on in a chapter. The officers were aware of many union concerns and issues but lacked the hands to perform all the tasks. Union concerns and issues were everywhere, but the elected officers no matter how efficient, could not be everywhere. CSEA resolved this dilemma by designating a member to represent the union at each worksite or department and the site representative program was born.

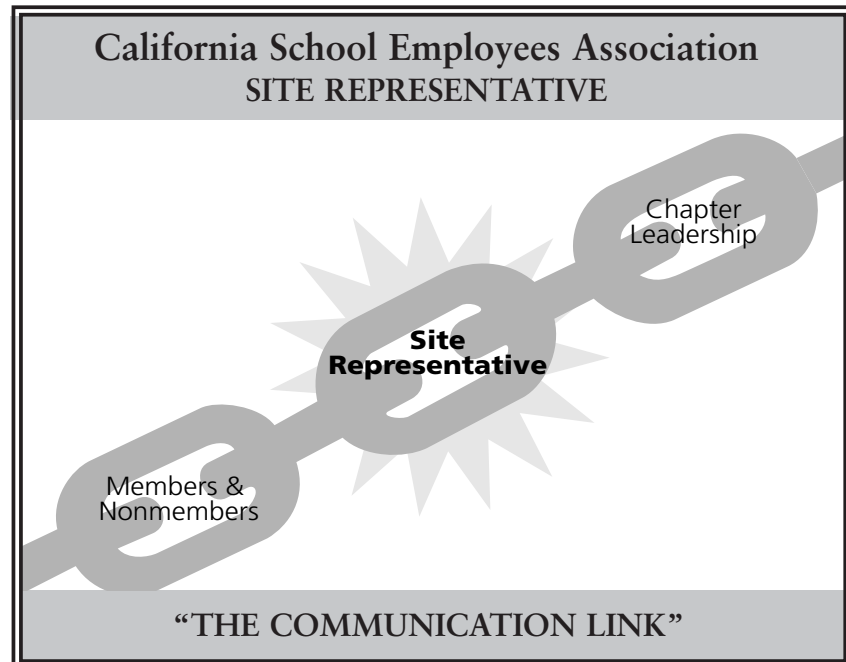
Today the site representative program is a highly visible, efficient program that allows CSEA leadership to have a finger on the very pulse of the union. The program also allows the bargaining unit members to communicate effectively with union leaders. The site representative program is the communication link that provides “reach out and touch” personal communication between the leaders and the rank and file unit employee. There is no substitute for this personal communication.

The CSEA site representative program establishes, by election or appointment, one or more union members at each work site or department to serve as the union at the site. The site representative will be called upon to distribute mail, post notices, maintain a site bulletin board, attend meetings, share information, greet new employees, and refer unit employees to other union leaders or the labor relations representative.

A trained, efficient site representative at each worksite or department is CSEA’s best opportunity to make a good first impression. Every CSEA chapter can have a site representative program designed to meet the needs of the local chapter. Every CSEA chapter has a need for a site representative program. Don’t miss the only opportunity you have to make a good first impression.

A CSEA Site Representative is...

- The UNION representative at the work site. A leader can't be everywhere, but union issues are.
- The first UNION contact for new employees. A friendly face in a crowd of new faces.
- The primary UNION contact for current employees. The site employees will talk to you because they know you and they trust you. You may be the only thing unit employees know about the union.
- The UNION role-model. Other employees will join the union, and be active in the union, because of your ability to communicate the importance and value of the union.
- The communication link for union actions and information.
- The eyes and ears of the union at your work site.



A CSEA Member is...

Vital to every organization, active members are the key to success.

- Members are the strength of the union because members:
 - elect leaders
 - ratify the collective agreement
 - represent the union on various district committees
 - conduct all the business of the union

- Members are a political force in the community and in the state because members:
 - endorse political candidates
 - are active in grassroots political actions
 - encourage elected officials to support education and labor
- Members are educated and informed, thanks to:
 - CSEA provided workshops and seminars
 - contract provisions for professional growth
 - training for committee and leadership positions

Members are the UNION in action.

CSEA MEMBERS RECEIVE MORE THAN CONTRACT BENEFITS.

Some benefits of membership are:

- accidental death dismemberment policy
- discounts for merchandise, entertainment, and travel
- discounts for automobile purchase, rental and service, scholarships and career grants
- legal advice and financial services
- health insurance for self and dependents
- other insurance needs, i.e., home, auto, income protection
- representation outside the contract, i.e., Unemployment and DMV hearings

A CSEA Non-member is:

A CLASSIFIED EMPLOYEE WHO HAS NOT JOINED CSEA.

By law, a service fee payer will receive the benefits of the contract (and may be required to pay for this representation) but will not receive the benefits of union membership as outlined above. The reasons classified employees continue to be service fee payers are many and varied, but the most common are:

They have not been asked to join CSEA.

They do not have information about CSEA.

They are of the mistaken notion that union members are anti-employer.

They pride themselves on their clever responses to membership recruitment efforts.

They don't know what they are missing.

SITE REPRESENTATIVE JOB DESCRIPTION

Reports to/Receives Direction From: *Site Representative Coordinator*

A Site Representative has two primary responsibilities:

1. BUILDING THE MEMBERSHIP, IN THAT THEY:

- Welcome new employees to the work site;
- Sign up new members;
- Attend chapter meetings and introduce new members from the site;
- Conduct work site meetings as needed;
- Establish and maintain CSEA bulletin boards at the site;
- Post and distribute CSEA materials and information to classified employees at the site.

2. REFER SITE EMPLOYEES TO A CHAPTER LEADER BEST QUALIFIED TO ADDRESS THE EMPLOYEES' CONCERN. THAT LEADER MAY BE:

- Grievance chairperson/job steward;
- Chapter president;
- Labor relations representative.

TIME REQUIRED: Two to four hours per month is sufficient time to:

- Attend chapter meetings;
- Conduct site business at the site.

TRAINING: Initial and ongoing training is provided by CSEA and scheduled by the site representative coordinator or other chapter leader.

QUALIFICATIONS:

- Ability to communicate effectively with members and service fee payers.
- Ability to exercise sound judgments.
- Basic knowledge of CSEA organizations and structure.

LENGTH OF SERVICES: One year, renewable.

COMMENTS:

This is an important position. The CSEA site representative is the union's vital link in communication with member and nonmember alike. The personal contact is the key to improved communication and increased CSEA membership.

The site representative is the union at the site.

SITE REPRESENTATIVE COORDINATOR

JOB DESCRIPTION

The Site Rep coordinator is responsible for working with state, regional, and local members and staff, to organize, implement, and coordinate a system of Site Reps who will assist with CSEA's communication network.

Duties:

- To ensure that each Site Rep is trained and knows who to contact when problems occur, i.e. Job Steward, Grievance Chair, E-Board, or the LRR
- To conduct monthly meeting with Site Reps
- To maintain Site Rep Activity Report
- To meet and report to the Chapter Executive Board any areas of concern as reported to you by Site Reps
- To identify and assist in developing strategies to solve complaints and concerns of unit members, i.e. Issue Organizing
- To work with CPRO and chapter leadership for distribution of CSEA newsletter, flyers, and other CSEA materials
- To encourage Site Reps to maintain and update bulletin Boards
- To coordinate the activities of the Site Rep Program
- To create an incentive and recognition system to reward active Site Reps
- To attend chapter meetings
- To encourage Site Reps to attend chapter meetings

Qualifications:

- Working knowledge of CSEA's organizational structure and Site Rep System
- Ability to motivate, organize and train others
- Successfully complete CSEA Site Rep Coordinator Training I & 11
- Member of Chapter Executive Board
- A commitment to build and strengthen the chapter leadership

Time required: Minimum of 6 hours per month

Vertical line

CSEA's ONE-ON-ONE PROGRAM

A one-on-one program is an important component of any internal campaign, whether centered around building membership education, a workplace issue or a legislative campaign. It is particularly useful and effective in a fully coordinated campaign involving additional staff resources and internal union members working together to build the union. It is critical that communication flows efficiently from chapter leaders to bargaining unit members, and from bargaining unit members to chapter leaders. A one-on-one program is the vehicle by which this communication flows.

As a result of one-on-one encounters two-way communication improves. When this happens activism and solidarity, as well as union membership, is sure to grow.

For the purposes of using one-on-one as part of a campaign to build and activate membership, the program should involve these primary components:

1. Membership survey
2. Site(s) mapping
3. Communications - Issue piece/flyer
4. Phone banking
5. Accurate record of contacts and responses
6. Followup contacts: The face-to-face
7. The key players
8. Know your basics

The survey

The survey is a poll designed to determine the concerns and thoughts of workers about issues confronting the association. It also provides the opportunity to bring union democracy to individuals and worksites. A survey can be conducted by your Site Rep/Volunteer at the worksite, mailed or conducted during phone banking. (For examples of surveys see Tab 13.)

Site mapping

Site mapping is a key component to putting the union at the worksite. Mapping will provide relevant information to your Site Reps and/or volunteers, like names of employees, membership status, site issues, and employee interest level which can be utilized during their recruiting or surveying. (See Tab 10.)

Communication

The issue piece or flyer is a guide constructed specifically for use in the work-site membership campaign. This printed piece highlights the issue and provides pertinent information about the association and the campaign. Together, the survey and the issue piece provide an exceptionally effective “hook” to open up one-on-one communications with bargaining unit employees. (See Tab 6.)

Phone banking

Phone banking will provide direct contact and a personal encounter for the actual one-on-one issue and/or action oriented communication. This is where information is given to members and nonmembers, and support and/or action is solicited. (See Tab 7.)

Accurate records of contacts and responses

Accurate records are a must. This will eliminate the common excuses like:

“No one told me.”

“I wasn’t aware of this issue.”

“I didn’t think it concerned me.”

Campaign coordinators must know:

WHO (has been contacted)

WHAT (message was given)

WHEN (they were contacted)

WHY (type of response).

Accurate records are essential for mapping sites and keeping your Site Reps/ Volunteers informed and their records updated, especially for follow-up. (See Tab 10.)

Follow-up

By now the employee has been contacted by phone about specific issue(s). If all goes well you will have documentation on the person’s initial reaction to the issue(s) during the phone banking stage of MUP.

The next phase of one-on-one is very important — the personal contact and follow-up. It is the face-to-face component of MUPs. This contact can be done by informed Site Reps. and chapter activists on release time. The face-to-face should be one-on-one or one-on-a-few. Group meetings are not the best place to discuss recruitment unless you know in advance that it won’t backfire on you.

The face-to-face contact, much like a phone script, should try to follow a very basic rule of contact:

- First you present your credential, who you are, what you represent
- Then you issue your concern, your question, your issue
- Last, you make your invitation, your pitch, your request to join, etc.

Records should be kept about the contacts and site visits. They will help you and other activists review and discuss concerns and objections raised at the work sites. The records will also help when you visit individuals for a second or third time to get closure on your request.

THE KEY PLAYERS

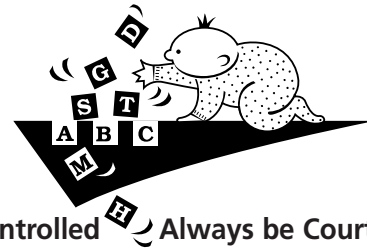
- **SITE REP COORDINATOR** (MUP chair or one-on-one coordinator) is designated to oversee the one-on-one aspect of the campaign. A one-on-one program of contacts is more involved than a site representative program in that several activities/tasks must be completed in a designated time frame. There will be materials to distribute, contacts to be made, responses to record, follow-up contacts and collection of response materials, i.e., member applications, volunteer cards, surveys, etc. A successful one-on-one program depends on commitment from the site representative (or site organizer). Commitment is recognized when the site representative displays a caring attitude, a desire to succeed and a fundamental knowledge of the issue and the union. The skills of one-on-one contacts can be learned. The commitment to the program is a matter of heart. A site representative that CARES can influence.
- **SITE REPRESENTATIVE** appointed/elected by the chapter leadership. This person is usually a site/department leader or activist with some influence. In a MUP campaign (or any other chapter campaign) this person is responsible for contacting the bargaining unit members at the site or department. A site representative can effectively make personal contacts with up to 30 bargaining unit members in a 10-day period at a designated site. At large sites, i.e., high schools, district offices and etc., additional help will be needed. Site organizers can be assigned by building, department, calendar track or other designations. CSEA staff representative can help you determine effective designations. It is important to remember that a site representative or site organizer is more effective if they are making contacts with co-workers at the site/department/building of their own work assignment. Some organization is required to make the one-on-one contacts effective. Therefore, a three-hour training program is essential for the site representative.
- **VOLUNTEERS** are essential and especially helpful in the absence of a full-fledged site representative program or if the designated site representative is not committed to the one on one aspect of a given campaign, it will be necessary for the Member Unity Program coordinator to select a “site organizer” at each site. For the purposes and success of the campaign the site organizer should attend the three-hour training program. One-on-one contacts are most effective when organized and structured by site or department. In small districts only a few people will be needed for this task. In large districts many people will be required to complete effective one-on-one contacts.

The one-on-one contacts are the pivot point for the success of the Member Unity Program. A site representative (or site organizer) is

expected to talk to their fellow employees on the job, before and after work, at breaks or lunch time about the identified issues. The one-on-one contacts are the key to educating the membership and soliciting support and involvement in the chapters' action programs. It is an excellent way to recruit service fee members. (See Tab 5)

- **CSEA STAFF REPRESENTATIVE** is there to assist your chapter in the one-on-one campaign and is a resource person skilled in phone banking and one-on-one membership recruitment techniques. His/her job is to work with the local chapter officers and executive board in planning and implementing the one-on-one program. During training the CSEA staff representative will help your chapter select the issue to use in your program, develop your one-on-one plan of action and prepare a calendar, which delineates time lines and assignments for the one-on-one campaign in your chapter. The staff representative assigned will also be available to train your chapter volunteers in the techniques needed to do an effective Member Unity Program.

Know the Basics — Your ABC's



Always be Confident

Always be Controlled

Always be Courteous

REPORTS AND RECORD KEEPING

Accurate records and reports are crucial to a successful Membership Unity Program. A reliable person should be elected or appointed to consolidate records and reports into one continually changing document.

Data documents are a must

A **MASTER** list of all bargaining unit members with name, address, work site, classification and phone numbers at home and work

A **SECONDARY** list of members at each site, including name, phone at home and work, hours of work and classification. Hours worked will be helpful here. The “support rate” will also be noted on this list as the campaign progresses.

What is a support rate?

Rating is the scale indicator of the unit employees’ support of the current issue.

1 = Solid Supporter

2 = Soft Supporter

3 = Undecided

4 = Leaning Against

5 = Strongly Against

It is important to have a contact card/sheet on all unit employees. Update the rating on a regular basis. Record dates of contact, comments and observations.

The old reliable 3x5 card in a recipe file box is not a high tech record, but it is a record. If you have access to a computer, printouts and lap tops – good, but if you do not, 3x5 cards can be readily obtained.

ACCESS RIGHTS

General Characteristics/Outcome Goals

The union's right to communicate with employees through site visits, the use of institutional bulletin boards, mailboxes and other means of communication originates under the Educational Employment Relations Act (EERA), Higher Education Employer-Employee Relations Act (HEERA), and the Meyers-Milias-Brown Act (MMBA) and is codified in the California Government Code. The use of these various means of communication is subject to reasonable regulation by the employer.

Included under access, if not covered under organizational rights, is the right of access to employee information. Without this right to information about the employees they represent a chapter's ability to communicate with its' members, service fee payers and/or non-members is greatly diminished.

The union's right to use computer, photocopier, facsimile machine, electronic mail, and voice mail falls under the umbrella of "other means of communication". Contract language relative to access should contain at least the basic rights guaranteed by applicable statute. Current contract language and existing practice must be analyzed before a decision is made to propose additional contract language.

LEGAL FOUNDATION

1. The union has the "right of access at reasonable times to areas in which employees work," and to communicate with employees, in addition to bulletin boards and mailboxes, by the use of other means of communication.
2. The district has the duty to provide the union with home addresses, phone numbers and other relevant information, and must negotiate any changes to how employees are notified of how to block the release of information under the revised Public Records Act.
3. Local government agencies, after consultation in good faith with the union, may adopt rules and regulations regarding the use of bulletin boards and other means of communication by the union.

REFERENCES

Govt. Code 3543.1(b)
(EERA) Govt. Code
3568 (HEERA)

Bakersfield City Schools,
(1998) PERB Decision
PERB Decision No.
1262 EERA

Govt. Code 3507
(MMBA)

4. Numerous cases have held that the union has rights to employee information (home address & phone number, hours, days and months worked, position title, site, pay range, date of hire, etc.) in order for the union to communicate with employees in their unit as a means for the union to fulfill their obligation of representing those employees.

5. PERB, in San Mateo City School District, held that the union's proposals regarding access were negotiable because they were related to the mandatory subjects of bargaining enumerated in Govt. Code 3543.2.

6. PERB, in Chula Vista Elementary School District, affirmed a Board agent's dismissal of a charge regarding a change in fax machine policy because the collective bargaining agreement contained a grievance and arbitration procedure which covered the alleged conduct and culminated in binding arbitration.

7. Federal and state laws permit public employers to monitor, read, or otherwise intercept messages.

8. A variety of federal and state court cases have determined that an employee does not have a legally protected interest of privacy in electronic mail messages.

REFERENCES

Compton C.C.D. (1990) PERB Dec. No. 790; Mt. San Antonio C.C.D. (1982) PERB Dec. No. 224; Oakland Unified School District (1983) PERB Dec. No. 326; et. al.

San Mateo City School District, (1984) PERB Decision No. 375 (EERA)

Chula Vista Elementary Education Association (1977) PERB Decision No. 1232 (EERA)

Cal. Pen. Code Sec. 63218 USC Sec. 2510(a)(5)18 USC Sec. 2701©(1)

POSITIVE ELEMENTS

1. Access is necessary for adequate representation of employees and is provided by statute. Optimum contract language guarantees the union reasonable access to employees through the use of employer electronic and telecommunication devices, including but not limited to computer, photocopier, facsimile machines, electronic mail, and voice mail.

2. Contract language should be general enough for easy site access by officers and CSEA staff in order to communicate with employees without undue restrictions or limitations.

REFERENCES

REFERENCES

3. Contract language should allow the union to be provided with employee information (home and site information) of all employees represented at least once per year. Although board agendas will often list names and titles of newly hired staff, the union should request they be provided with all relevant information of new employees soon after those employees are hired.
4. General contract language should provide for access to employees through the use of employer electronic and telecommunication devices. Avoid specific language that would restrict or regulate use of equipment. Existing practice will support the general contract language.

NEGATIVE ELEMENTS TO BE AVOIDED

REFERENCES

1. Employees should not expect electronic mail messages to be protected at the workplace. The rationale is that the employer owns the equipment and that the communications occur during work hours during the normal course of business.
2. Employees should not expect a constitutional right to privacy regarding electronic mail messages. Constitutional law cases on this issue do not support a protected privacy interest in electronic mail messages.
3. Where binding arbitration exists in a collective bargaining agreement, it is important that the contract language is clear; and that existing practice supports the intent and meaning of the contract language.
4. The district has the right to negotiate reasonable access rules. However, avoid contract language that limits union access to employees on sites, or to employee information. Limitations such as “CSEA must notify the site principal/director 24 hours prior to coming onto the site” is strongly discouraged. So are regulations that charge CSEA for copies of new employee information.
5. Avoid any language that allows site or district officials to “approve” flyers for bulletin boards, distribution, etc.
6. Avoid language stating the union cannot use inter-school mail. There is some legal precedence in this area favoring management’s side but it is seldom known or used. If management proceeds in this area demand to negotiate the effects. Protect your right to mail packets to sites and have the contents distributed once they reach the site.

VICTORY CLUB

The Victory Club has become CSEA's ticket to getting issues before the voting public. It also is a key ingredient to keeping our pro education and pro labor majorities in the state legislature. Our hard work and financial contributions now permit progress on some of our key legislative issues. Progress is not easy or inexpensive. It takes money to compete, and it takes money to assure our voice is heard in Sacramento.



Let's not forget California's tradition of costly anti education and anti-labor Initiatives. Those who oppose our interest are not afraid to spend money to advance their point of view. Many issues that effect labor unions, and classified employees in particular, are being put to the public via the election ballot. The public is educated regarding these issues by paid media. Paid advertising (television, radio, newspaper) is very expensive, but is very effective. In recent history media campaigns were funded as follows:

Proposition 174, the Voucher Initiative: It took almost \$20,000,000 to defeat this anti-public school, anti-worker initiative. It may take more for the next one. CSEA's contribution to the cause was over \$1,000,000.

Proposition 162, the PERS Protection Initiative: The total expense to qualify the proposition for the ballot and when the election to protect your retirement money was \$2,059,962. In terms of "hard" money, CSEA contributed a little over \$100,000.

Proposition 223, or what we called the 95/5 Initiative: It took a massive effort, including over \$1,000,000 from CSEA to defeat this measure which would have cost thousands of classified employee jobs. One teacher union local, UTLA contributed \$218,000 to support the measure.

Proposition 226, Pete Wilson's anti-worker, anti-union Initiative: It took over \$5,000,000 to defeat this plan to weaken all public employee unions and silence your voice in Sacramento. Due to the many demands for CSEA political funds, we were able to only contribute \$50,000 to this fight.

According to the Secretary of State's office, a grand total of \$192.9 million was raised and spent on the 1998 general election ballot measures. This amount set a new record. It is apparent with spending like this, the cost of educating (or influencing) the public to our way of thinking is going to be very expensive. Obviously, we cannot have a bake sale in August to pay for a media campaign to influence the electors in November. WE MUST have the financial resources in our pocket. The Victory Club will provide the resources we need and will not be a burden to any of our members.

As a MUP Committee, there are a number of ways you can use the Victory Club in your campaign without interfering with your initial goal.

NOTE: Victory Club recruitment is one of the criteria used to judge a successful MUP chapter. Many successful MUP chapters have used Victory Club participation as a central issue in their campaign.

How to use the Victory Club in a MUP Campaign

1. **Recruit Victory Club sign-ups** from members of long standing.

This can be done when contacting members to volunteer time for a specific project in the MUP campaign. Add the Victory Club Donation as a way for the member to help.

2. **Have a Victory Club drive.**

By offering incentives to members who donate before a certain date, have the most VC'ers at their site, or recruit other VC'ers. This can be especially effective in patriotic seasons, elections years, or following informational flyer regarding the labor movement and how effective they have been in protecting the American worker.

Victory Club Membership

The Victory Club was created to protect the security of classified employees and their families. More money is needed to **fight** anti-public school, anti-labor legislation, as well as to **promote** pro-public school, pro-labor legislation and to elect politicians supportive of our positions.

A dime a day will make you part of a winning team:

For only a dime a day you can stop politicians from dipping into your wallet. By joining the Victory Club; you will get a Victory Club lapel pin, updates on important legislative and election campaigns and invitations to special members-only events. Most importantly, you will be making sure the legislative system works for your security.

Here's how to join. We need you now!

Fill out and return a Victory Club membership application today. Automatic salary deduction is provided, since it lowers administrative costs and maximizes long-range budget planning which is critical to the success of all legislative and political campaigns. Membership categories are shown below.

Membership categories

- | | |
|----------------|---|
| VIP | Automatic salary deductions of \$6.00 or more per month or a direct contribution of \$75.00. |
| Sponsor | Automatic salary deductions of \$3.00-\$5.99 per month or a direct contribution of \$40.00. |
| Member | Automatic salary deductions of \$1.00-\$2.99 per month or a direct annual contribution of \$15.00. |
| Retiree | All retired classified employees are invited to join any of the three Victory Club categories through direct contributions. |

Victory Club Membership Applications

Application directions when making a payroll deducted contribution.

Complete two applications. Send both applications to the District Payroll Office.

One application is for payroll records, the other to be forwarded to CSEA with your first deduction.

Application directions for one time only contribution.

Complete one application. Send it with your personal check to:

California School Employees Association
P.O. Box 640
San Jose, CA 95106-9986

You do not need to be a member of CSEA to make a one time only contribution to the Victory Club.

Victory Club applications cards are available from the field office nearest you.

The application (next page) may be copied.

Attention MUP Committee

If you are having a Victory Club drive, you may want to collect all the applications (one per person), make copies (this can be done at the field office) with your LRR, take the applications to the district payroll office for deductions and sent the copies to CSEA headquarters. Alerting them to the fact that with the next payroll deduction contributions will be made to the Victory Club by the attached employee list. Naturally, any one-time contribution would be sent directly to CSEA headquarters with the application enclosed.



VICTORY CLUB MEMBERSHIP APPLICATION



YES, I WANT TO JOIN THE VICTORY CLUB

LAST NAME, FIRST NAME, MIDDLE INITIAL – PLEASE PRINT

SOCIAL SECURITY NUMBER

CSEA CHAPTER NUMBER

EMPLOYER

HOME ADDRESS

CITY

ZIP

()
DAYTIME TELEPHONE

()
HOME TELEPHONE

CSEA AREA & REGION (IF KNOWN)

I hereby authorize and direct my employer to deduct from my paycheck OR increase my Victory Club contribution monthly and transmit that amount to the CSEA Victory Club the total sum of (check box below):

■ PREFERRED OPTION – PAYROLL DEDUCTION:

VIP \$10 VIP \$6 SPONSOR \$5 SPONSOR \$4 SPONSOR \$3 \$_____ Other

I understand that my VICTORY CLUB contribution is in addition to my present CSEA dues deduction. The effective date will be the date of the next payroll following receipt of this application by the employer. This authorization shall remain in full force and effective until revoked in writing by me.

■ ALTERNATE OPTION – ANNUAL CONTRIBUTION: I would like to become an annual member of the CSEA Victory Club.

I would like to continue my annual membership in the CSEA Victory Club. Enclosed is my check for:

\$100 \$75 \$40 \$25 \$15 Please make checks payable to “CSEA Victory Club,”

place check and application in an envelope and mail to CSEA Headquarters. (Address on reverse side of this card.)

■ MEMBERSHIP INCREASE: I want to increase my Victory Club Membership to \$_____ per month.

Yes No
VICTORY CLUB PIN RECEIVED

 Yes No
VIP OR SPONSOR BAR RECEIVED

DATE

MEMBER’S SIGNATURE

ENROLLED BY

SOCIAL SECURITY NUMBER

CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION

9028-00 (AELU)



VICTORY CLUB MEMBERSHIP APPLICATION



YES, I WANT TO JOIN THE VICTORY CLUB

LAST NAME, FIRST NAME, MIDDLE INITIAL – PLEASE PRINT

SOCIAL SECURITY NUMBER

CSEA CHAPTER NUMBER

EMPLOYER

HOME ADDRESS

CITY

ZIP

()
DAYTIME TELEPHONE

()
HOME TELEPHONE

CSEA AREA & REGION (IF KNOWN)

I hereby authorize and direct my employer to deduct from my paycheck OR increase my Victory Club contribution monthly and transmit that amount to the CSEA Victory Club the total sum of (check box below):

■ PREFERRED OPTION – PAYROLL DEDUCTION:

VIP \$10 VIP \$6 SPONSOR \$5 SPONSOR \$4 SPONSOR \$3 \$_____ Other

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■ ALTERNATE OPTION – ANNUAL CONTRIBUTION: I would like to become an annual member of the CSEA Victory Club.

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place check and application in an envelope and mail to CSEA Headquarters. (Address on reverse side of this card.)

■ MEMBERSHIP INCREASE: I want to increase my Victory Club Membership to \$_____ per month.

Yes No
VICTORY CLUB PIN RECEIVED

 Yes No
VIP OR SPONSOR BAR RECEIVED

DATE

MEMBER’S SIGNATURE

ENROLLED BY

SOCIAL SECURITY NUMBER

CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION

9028-00 (AELU)

WRITING THE PLAN

The Membership Unity Program Plan that is adopted by your chapter will have most of the components of the training program. Chapters will try to create a plan they feel is “possible.” This means using components of the MUP training.

It is important for you and your chapter to know that plans are fluid... and can be changed as the plan unfolds.

Please be sure to send a copy of your plan (including budget proposal) and a copy of your work calendar to:

Jim Knox
Senior Labor Relations Rep./Organizing
8217 Auburn Blvd.
Citrus Heights, CA 95610
or
Phone: 916-727-7314
FAX #: 916-725-3735
E-mail: Jknox@CSEA.com

The deadline for submitting your plan is as follows:

- ▶ MUP chapters need to send their plan/budget/calendar in by the last day of January.

Now that you have completed the course of study for a successful Member Unity Program you are prepared to write a “plan” for your specific chapter. While all of the information in the MUP binder is beneficial, you may or may not include every aspect of the MUP in your plan. All successful MUP programs have included some of the components of the MUP binder. The most successful MUP programs have included all or most of the components of the MUP binder.

The “must have” components of a MUP Plan for any chapter undertaking a serious Member Unity adventure are:

1. **MUP COMMITTEE:** A group of people committed to the principals of member unity.
2. **PLAN/CALENDAR:** A systematic approach to implement activities and events to assure goals and objectives are achieved. (Tab 4)
3. **ISSUE:** A concern that can/will impact unit employees in a negative way if left unresolved. (Tab 2)
4. **THEME:** An easily recognized slogan, phrase, or logo that identifies the group concern to all the members of the unit. (Tab 2)
5. **VOLUNTEERS:** Additional members of the unit willing to work together for the good of the whole. (Tab 5)
6. **RECORDS:** To assure that all unit employees have been informed, and contacted regarding the issue. (Tab 10)

Other components that will help the committee pull the plan together and insure greater success.

1. **PRINTED MATERIAL:** Educational, thematic and timely with information on the issue. (Tab 6)
2. **INCENTIVES AND REWARDS** for willing participants.
3. **PHONE BANKING** for personal contact with chapter members and unit employees. (Tab 7)
4. **ONE-ON-ONE** contacts for more personal in-depth discussions between the members of the chapter and unit employees regarding the issue of mutual concern. (Tab 9)
5. **FOLLOW-UP** contacts to inform and educate all unit employees.
6. **CELEBRATION** of success.

The completion of the training session and an understanding of the material in the MUP binder will be a road map for MUP success in your local chapter. The plan will take you from the “you are here” dot to where your chapter needs to be.

PLAN WRITING START HERE!

Brainstorm and record

- Identify your MUP committee and chairperson.
- Discuss any ISSUES in your chapter. Identify the ISSUE that the MUP will define, promote and resolve, at least in part, in the course of the MUP. (Tab 2 will help you with tools to correctly identify an issue that can be resolved for the benefit of the chapter.)
- Select a Theme.
- Establish goal to be accomplished.
- Discuss/Identify activities/events to be held.

Calendar

- Identify all school calendar dates known.
- Pencil in MUP and chapter activities, training, meetings, etc.
- Estimate time lines and lead time needed for all activities.

Resources

- Identify all resources needed to implement the proposed activities. (facilities, trainers, supplies, materials, volunteers, unit list, member lists, newsletters, Bulletin Boards, Site Representatives, committees, release time, food, incentives, mail facilities, distribution systems, etc.).
- Identify all the resources currently available to the MUP committee. Note the contact person.
- Make a list of additional resources to be requested. Appoint someone to request. Date needed.

Materials

- Draft flyers, information sheet, phone scripts, contact packets, etc.
- Develop a message discipline.
- Identify mail delivery dates and system.

Estimate cost

- Suggested chapter contribution. (Must be approved and budgeted by chapter membership.)
- Estimate the proposed expenses for all cost items/activities (Staff can help identify the “no cost” activities).

Paper work

- Appoint project committees.
- Revise and refine calendar dates. Notify people as necessary.
- Chapter budget contribution. Chapter approval.
- Copy of plan to MUP coordinator, LRR/O, LRR

Blank forms are included in this section. Use the form to detail your plan. The MUP chairperson is to submit a copy of the plan and budget to the MUP Coordinator. (Note the deadline for submission.) Your local LRR and LRR/O will also need a copy of the plan, the budget and the calendar of events. Keep a copy for your chapter files. Everyone on the MUP committee needs a copy of the plan, budget and calendar.

MEMBERSHIP UNITY PLAN OUTLINE/REVIEW

Chapter name (& number): _____

Chapter MUP Coordinator (name): _____

Address: _____

Work phone: _____ Home phone: _____

MUP Theme: _____

MUP Goal: _____

Other MUP Coordinators

Volunteer Coordinator _____

Phone Banking Coordinator: _____

One-on-One Coordinator: _____

Refreshment Coordinator: _____

Does your plan include the use of Site Reps/Job Stewards?

Job Steward: Yes No Site Rep: Yes No

Is the Site Rep./Job Steward program already established?

Job Steward: Yes No Site Rep: Yes No

How will you include the Victory Club in your MUP Plan?

Indicate the mailings you have planned (include dates to mail).

Indicate the phone banking you have planned. Who will be called? How many calls need to be made?

What dates have you planned for the phone bank? Where will you make the calls from?

How will your one-on-one contact be accomplished in your MUP plan?

Indicate the events (dates) where you will be serving refreshments, the type of food, and approximate number of people to be served.

Indicate chapter events and functions (chapter meetings, ratification, in-services, negotiations, school board meetings, etc.) that may be involved in the MUP plan (include dates).

What incentives do you plan to use, and how?

Will the MUP plan target any special groups of employees? If so which groups?

What literature do you plan to use in your MUP plan?

(Please attach Budget Proposal to this plan)

MEMBERSHIP UNITY PROGRAM

BUDGET PROPOSAL

Chapter name (& number): _____

Dates of MUP Campaign: _____

INCOME from Chapter contributions to MUP Plan: _____

EXPENSES

Postage _____

Food _____

Incentives _____

Facility rental _____

Expenses for training _____

Release time _____

TOTAL EXPENSES _____

BALANCE OF EXPENSES

(after deducting chapter contributions)

California School Employees Association Classified Employee Opinion Survey

California School Employees Association (CSEA) invites you to share your views and opinions about your job.

This survey will help us determine the most important issues facing school employees and establish your union's priorities.

Please help us help you by taking a few minutes to fill out and return this survey.

General Information

(Please circle the appropriate letter or number corresponding to your answer.)

1. For statistical purposes only, indicate the school district in which you work:

2. Which of the following classifications best describes your job?

- a. operations
- b. maintenance
- c. office & technical
- d. food service
- e. transportation
- f. paraprofessional
- g. data processing
- h. security
- i. other (please specify)

3. How long have you worked in this school district?

- a. 5 years or less
- b. 6–10 years
- c. 11–15 years
- d. 16–20 years
- e. over 20 years

4. a. How many hours per week do you work? _____
 b. How many months per year do you work? _____
 c. Temporary? _____ How long? _____

5. Indicate whether you are on a salary or paid by the hour.

- a. salary
- b. hourly

6. Are you eligible for any of the following benefits offered by your school system? (circle one)

- | | | | |
|---------------------|-----|----|----------|
| a. health insurance | yes | no | prorated |
| b. vacation | yes | no | prorated |
| c. sick leave | yes | no | prorated |
| d. retirement | yes | no | prorated |

7. How skilled is your job considered to be by each of the following people or groups?

	highly skilled	skilled	semi-skilled	unskilled	anybody can do it
a. school board	1	2	3	4	5
b. superintendent	1	2	3	4	5
c. administrators	1	2	3	4	5
d. supervisor	1	2	3	4	5

8. In your school system do you feel you are regarded as part of the education team by: (circle yes or no)

a. school board	yes	no
b. superintendent	yes	no
c. administrators	yes	no
d. supervisor	yes	no
e. teachers	yes	no
f. parents	yes	no
g. your union or association	yes	no

Job Satisfaction

(Please circle the appropriate letter or number corresponding to your answer.)

9. Circle four of the following working conditions that are in the most need of improvement on your job.

- a. new employee orientation program
- b. training/in-service
- c. job security
- d. evaluation
- e. safety and health
- f. accurate job descriptions
- g. evenly distributed workloads
- h. job posting procedure
- i. transfer opportunities
- j. adequate supplies and proper equipment to do your job

11. If you could make improvements in one of the following categories, which would you choose?

- a. salary
- b. treatment on the job
- c. fringe benefits (health insurance, vacation, sickleave, holidays)

12. What improvements do you feel are needed on your job?

10. How satisfied are you with the following?

	very satisfied	satisfied	somewhat satisfied	unsatisfied	very unsatisfied
a. salary	1	2	3	4	5
b. treatment on the job	1	2	3	4	5
c. fringe benefits	1	2	3	4	5

Employee Organizations

13. The following are activities normally performed by an employee organization. Rate the importance of each activity.

	very important	important	somewhat important	not important	not sure
a. Negotiating for salaries and benefits	1	2	3	4	5
b. Helping employees with job-related problems	1	2	3	4	5
c. Lobbying local, state and federal government on issues affecting school employees	1	2	3	4	5
d. Supporting political candidates	1	2	3	4	5
e. Communicating regularly with members, non-members and providing job-related information	1	2	3	4	5
f. Providing low-cost group insurance	1	2	3	4	5
g. Discounts on travel and merchandise	1	2	3	4	5

14. Please rate your union's performance in each of the following areas.

	very good	good	fair	poor	not sure
a. Negotiating for salaries and benefits	1	2	3	4	5
b. Helping employees with job-related problems	1	2	3	4	5
c. Lobbying local, state and federal government on issues affecting school employees	1	2	3	4	5
d. Supporting political candidates	1	2	3	4	5
e. Communicating regularly with members, non-members and providing job-related information	1	2	3	4	5
f. Providing low-cost group insurance	1	2	3	4	5
g. Discounts on travel, merchandise, magazines, etc.	1	2	3	4	5

Training

15. Pick three of the following topics in which you would like to receive more training or information.

- a. time management
- b. stress management
- c. interpersonal relationships
- d. communication skills
- e. student discipline
- f. health and safety
- g. pay equity
- h. other
- i. none of the above

16. Indicate your sex and age for statistical purposes.

___ male ___ female

___ 18-24 ___ 25-34 ___ 35-50 ___ 50-64 ___ 65+

17. If you would like the results of this survey, fill in your name and address.

18. If you would like someone to contact you with more information on CSEA, give your name and telephone number.

OPINION SURVEY

**CALIFORNIA SCHOOL
EMPLOYEES ASSOCIATION**
1505 Gardena Avenue
Glendale, CA 91204

To return the questionnaire, please refold so
the Business Reply Mailer is on the outside of
the survey and drop it into any mail box.
No postage is necessary.



AFL-CIO

California School Employees Association

2045 Lundy Avenue
San Jose, CA 95131
PO. Box 640
San Jose, CA 95106
(408) 473-1000
(800) 632-2128

Executive
FAX (408) 321-8227
First Floor
FAX (408) 954-0948
www.csea.com

Clyde Rivers
Association President

Bud Dougherty
Executive Director

Member of the AFL-CIO

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*Member of the National
Association of Classified
School Employees
(NACSE), representing
independent public
employees throughout
the nation*



To: Maintenance/Transportation/Food Service/Operations/Support Employees

From: California School Employees Association

Subject: NEGOTIATIONS SURVEY

By now you should have received word that CSEA has filed for an election in the Alum Rock School District. Soon you will have a chance to vote for the union you want to represent you.

For CSEA to give you the best representation possible, it's necessary to prepare now to negotiate a contract. **Please be aware**, your current contract (and benefits) will remain in full force and effect until a new contract is negotiated. Also, a vote for CSEA will give you your own local chapter with its own elected officers and its own contract.

To get ready for negotiations, we have prepared the attached survey. With the information you provide and with advice from CSEA's expert staff and counsel, we will prepare a contract proposal. The proposal will then be sent to all blue collar employees for approval and then submitted to the district. Upon election of CSEA, we will be ready to negotiate with the district on your behalf.

Please take the time to complete the survey and return it to CSEA in the enclosed envelope (no postage necessary). **Your input is important.**

Regardless of the other union's charges and rhetoric, you need to know the California School Employees Association represents only classified school employees like you, and does it better than anybody else. CSEA works for you.

Thank you.

The CSEA Organizing Committee

Our mission: To improve the lives of our members, students and community.

CSEA Alum Rock Local Chapter 217 Negotiations Survey

What is your job class? _____

What is your job site? _____

Salary

1. What would you consider a fair percent salary increase? _____%

2. Are you interested in an "across-the-board" salary increase
(ie., 50 cents per hour, \$100 per month)? Yes _____ No _____

2a. If yes, what would you consider fair? _____

3. The following is a list of major negotiation subjects. Please rate the subject as to level of importance and use the blank space to write in any suggestions or areas of concern:

	High Priority	Important	Somewhat Important	No Problems
a. Hours of Employment _____ _____ _____	4	3	2	1
b. Longevity _____ _____ _____	4	3	2	1
c. Overtime/Comp Time _____ _____ _____	4	3	2	1
d. Holidays _____ _____ _____	4	3	2	1
e. Vacations and Holidays _____ _____ _____	4	3	2	1
f. Sick Leave _____ _____ _____	4	3	2	1

	High Priority	Important	Somewhat Important	No Problems
g. Other Types of Leaves _____ _____ _____	4	3	2	1
h. Transfer, Promotion and Reclassifications _____ _____ _____	4	3	2	1
i. Professional Growth _____ _____ _____	4	3	2	1
j. Grievance Procedure _____ _____ _____	4	3	2	1
k. Discipline _____ _____ _____	4	3	2	1
l. Evaluation/Employee Rights _____ _____ _____	4	3	2	1
m. Safety _____ _____ _____	4	3	2	1
n. Employee Expenses and Materials _____ _____ _____	4	3	2	1

Health Benefit Coverage

- How could current **Medical** Benefits be improved? _____

- How could current **Dental** Benefits be improved?

3. How could current **Vision Benefits** be improved? _____

4. Do you support obtaining a **Disability Plan** (similar to State Disability Insurance)? Yes _____ No _____

5. Are you interested in establishing paid (or partially-paid) health benefits for retirees? . Yes _____ No _____

6. Are you interested in establishing early retirement health benefits? Yes _____ No _____

General Subjects

1. Is overtime distributed fairly and equitably? Yes _____ No _____

2. Are promotions made without due regard to merit and seniority? Yes _____ No _____

3. Does the district play "favorites" when assigning the work? Yes _____ No _____

4. Does the district play "favorites" when disciplining employees for violations of district rules? Yes _____ No _____

5. Do you believe there are health and safety problems at work which are not being corrected? Yes _____ No _____

6. Do you believe the current job descriptions and classification plan properly describe your job and fairly compensate you for the work you perform? Yes _____ No _____

7. Is your department staffed adequately (Do you have enough help to get the work done in the time you are allowed)? Yes _____ No _____

Additional Comments

Please use this space for additional details, things we may have missed or anything you think might be helpful.

Optional

1. Name _____

Address _____

Phone number (home) _____ (work) _____

2. Would you like to be involved with negotiations (either negotiating team or research committee)? Yes_____ No _____
3. Would you like to be involved in CSEA's Site Representative Program (mainly for communications)? Yes_____ No _____
4. If given proper training and support, would you like to be a CSEA Job Steward? Yes_____ No _____



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employee association*

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Association of Classified
School Employees
(NACSE), representing
independent public
employees throughout
the nation*



Dear Classified Employee:

Enclosed is a survey for your bargaining unit. CSEA is serious about improving our visibility and service in your district.

For us to deal effectively with your issues, we need your input. Please complete the survey and return it in the postage-paid envelope.

After we receive the survey results, CSEA will publish an action plan regarding the important issues the survey reveals.

Sincerely,

CSEA Chapter 24
President and Executive Board

Our mission: To improve the lives of our members, students and community.

**California School Employees Association
Bargaining Unit Survey
ABC Unified**

1. What is your classification? _____
2. How many hours per day are you employed by the district? _____
3. If you work more than four hours per day, do you receive district-paid health benefits? Yes____ No____
4. Do you feel the hiring practices of the district are fair and in compliance with principle of merit? Yes____ No____
5. Do you feel promotions are made with due regard to merit and ability? Yes____ No____
6. When you were hired for your current position, or any previously held position in the district, who made the final decision to hire you?
Principal ____ Teacher ____ Other _____
7. Do you know on which step of the salary schedule you are currently paid? Yes____ No____
8. Do you know how much vacation and sick leave you earn per month? Yes____ No____
9. Have you ever been notified you must take your unused vacation time by a certain date or you will lose it? Yes____ No____
10. Have you ever forfeited vacation days because you did not feel you could take them while school was in session? Yes____ No____
11. How many years have you worked for the district?
12. If you are receiving longevity pay, are you satisfied with the longevity plan? Yes____ No____
In what way would you like to see this scale adjusted?

13. Are you able to complete your assigned tasks during your regular work hours? Yes____ No____
14. Are you allowed overtime or pay for extra hours if needed? Yes____ No____
15. If you are receiving district-paid benefits, do you think they could be improved? Yes____ No____

16. If you are not receiving benefits and would like to, please rank the benefits in order of most importance to you, with one being the most important and five being the least important:

- ___ medical insurance
- ___ dental insurance
- ___ vision insurance
- ___ life insurance
- ___ income protection plan
- ___ retirement

17. Do you feel your current job description and classification properly describe your job and fairly compensate you for the work you do? Yes___ No___

18. Have duties been added to your work assignment or has equipment been added necessitating new skills, and requiring you to work out of your classification? Yes___ No___

If so, what percentage of your time is spent on these duties? _____%

19. Do you believe you perform tasks significantly different from those performed by other employees in your classification? Yes___ No___

20. Do you believe adequate training is given new district employees? Yes___ No___

21. Are you currently enrolled in job-related classes at a college or university? Yes___ No___

22. Are you satisfied with your professional growth program? Yes___ No___

23. Do you feel the district provides you with adequate in-service training on an ongoing basis? Yes___ No___

24. If you are a classroom assistant, are you frequently left alone in the classroom with students? Yes___ No___

25. Have you ever been notified of your seniority standing or how your seniority is computed? Yes___ No___

26. Have you ever received a layoff letter or been asked to resign your position because of lack of funding for specific programs and later been called back to work? Yes___ No___

27. When you were called back to work, do you know if any new employees in your classification had been hired by the district prior to your receiving notice to return to work? Don't Know___ Yes___ No___

28. If you were laid off from your position, do you know of other employees in your classification with less seniority who did not receive layoff notices? Don't Know____ Yes____ No____

29. How much salary increase should your union negotiate? _____%

30. Do you think there are health and safety problems in the district? Yes____ No____

If yes, please describe _____

31. How can morale be improved among paraprofessional employees?

32. Please comment on any concerns regarding your specific work:

Thank you for your participation in this survey. Classified employees come first with CSEA. Your input helps CSEA deliver on our commitment to you.

CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION
CLASSIFIED EMPLOYEES SURVEY

Please complete this survey and return by school mail to:

Obie Moore—Marina High School or Kaysee Rowlett—Westminster High

This information will help CSEA provide good representation to all Huntington Beach Union High School District classified employees. It will also help us to know what information is needed regarding CSEA's programs.

1. Have you received a copy of the contract negotiated by CSEA? Yes _____ No _____
2. Are you satisfied with the contract language? Yes _____ No _____

What changes would you like made in future negotiations?

3. Do you receive district-paid medical benefits? Yes _____ No _____
- Are you satisfied with the benefits?
- Medical Yes _____ No _____
- Dental Yes _____ No _____

What changes would you like made in the benefits?

4. Do you have a good working relationship with your supervisor? Yes _____ No _____
5. Do you regularly receive the lunch and rest breaks to which you are entitled? Yes _____ No _____
6. Do you receive overtime pay (or compensatory time) for any work performed beyond 8 hours per day? Yes _____ No _____
7. Is overtime paid (or compensatory time being granted) at the rate of 1½ times the overtime hours worked? Yes _____ No _____
8. Are you exposed to safety or health hazards at your work location? Yes _____ No _____
9. Do you know how to contact a representative if you have a question about the contract or a job-related problem? Yes _____ No _____
10. Are you currently a CSEA member? Yes _____ No _____

CSEA held a special event to make the following programs available to members and provide non-members with information as well. Please check the items below about which more information is still needed.

___ service free-interest bearing checking accounts and other CSEA credit union services

___ savings on auto and homeowners insurance

___ new car discounts

___ used car discounts

___ entertainment center discounts (Disneyland, Knotts, etc.)

___ local theater discounts

___ home club membership discount

___ national auto club membership

___ group life insurance

___ dependent life insurance

___ group dental insurance

___ personal accident insurance

___ in-hospital benefit (supplemental hospital insurance)

___ tax-sheltered annuities

___ CSEA membership information

Comments _____
