













# AFGE Steward's Instructor Guide



Slides/Support Material	Steps for Instruction/Key Points/Talking Points	Notes
 <p>AFGE's Representation Training</p>	<p><b>SAY:</b> Welcome to AFGE's Representation class.</p> <p>My name is _____ and I want to also introduce __ and __. We will be your instructors for this course.</p> <p>This course will introduce you to the many responsibilities you hold as a union steward and help you to identify key resources you will need to effectively serve your members.</p>	
<p>Course Materials</p> <ul style="list-style-type: none"> <li>• Participant Workbook</li> <li>• Steward Handbook</li> <li>• Title 5 U.S.C. Chapter 71</li> </ul> 	<p><b>SAY:</b> Here are the materials that you should have right now for this class.</p> <p>Please take a look through the Participant Workbook. Notice that there are a lot of blank spaces. You will be responsible for filling in these blanks. You will use the Stewards Handbook and the 5 U.S.C. Chapter 71 handout as a resource throughout the class.</p>	
 <p>Course Objective</p> <ul style="list-style-type: none"> <li>• By the end of this course, you will be able to identify the various roles of a Steward, practice skills needed to perform your role effectively, and become aware of the resources available to help you be successful in your Union role.</li> </ul>	<p><b>SAY:</b> Again, (Read the slide) this is the main objective for this course.</p>	

 <p><b>What norms can we abide by in this learning community?</b></p>	<p>Read the Slide and allow people to answer the question.</p> <p>If flip chart paper is available, write them up as people speak.</p>	
 <p><b>Introductions</b></p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Local</li> <li>• Describe one (1) reason why you got involved with your Union</li> </ul>	<p><b>ASK</b> the participants to go around the room and introduce themselves using the questions on the slide.</p> <p>NOTE there are many reasons for why individuals became a Steward, discuss how this relates to values such as justice, service, solidarity, and fairness.</p>	
	<p><b>SAY:</b> Turn to page 3 in your PW. Before we discuss the various roles that a steward serves in the Union, let's briefly review the three functions of the Union, often called the "Union Triangle". If any of these functions are weak, the other areas will suffer as well.</p> <p><b>SAY:</b> While many union members understand that negotiations and grievances are important, the union is not effective if the majority of the employees are not in the union or if the community and elected representatives do not support the work you do.</p>	
	<p><b>SAY:</b> Turn to page 4 in your PW. As a steward, you are the face and the front line of the Union in the workplace. As a steward, you serve as <u>Worksite Leader and Problem Solver</u> in identifying problems and working towards solutions with or, sometimes in spite of, management. This can involve representing an employee who is being disciplined, bargaining over a change in workplace conditions, or working to resolve an ongoing safety issue.</p> <p><b>SAY:</b> The workplace can be a complicated place, and our members are counting on your <u>Communication and Education</u> skills to make sense of it. Equally important, union officers are depending on you to help them keep in touch with their co-workers, and you will represent employees with agency management.</p>	

	<p><b>SAY:</b> As an <u>Organizer</u>, the Steward is responsible for letting employees know about the benefits of union membership, increasing involvement in the union among our members, recruiting potential members into the union, and identifying potential leaders.</p> <p><b>SAY,</b> Through the legislative and political process, our benefits and rights may be established, created, improved, restricted, or eliminated altogether. Henceforth, the value of your role as steward, as it pertains to being a <u>Legislative and Political Activist</u>. Being active in the community can build support that can help you with legislation, or even can assist in building pressure against a facility closure that would result in job loss.</p>	
<p>Knowledge and Resources</p> <ul style="list-style-type: none"> <li>• What Must a Steward Know?</li> <li>• What Materials Does a Steward Need?</li> </ul> 	<p><b>SAY:</b> As the person who represents our union at the most vital level, there are some skills and information you need and need to know. Take a moment to review page 14 and 15 in the Stewards Handbook. Turn to page 5 in your PW.</p> <p><i><u>Instructor's Note:</u> Read the instructions on page 18 in their Participant Workbook. Consider splitting the class into teams for each question. Have them volunteer answers through the CHAT or write answers into Word document on home screen.</i></p> <p><b>SAY:</b> Your responses should be recorded in your Participant Workbook.</p> <p><b>ASK:</b> Is there anything I can clarify about this assignment?</p>	
	<p>Instructor's Note: If there are a number of experienced stewards in the class, have them state what they feel is an important best practice for Stewards. Use the slides to review key points or items not raised in the discussion.</p> <p>If the class is inexperienced, use the following slides to review key points on steward best practices.</p>	
 <p><b>How To Be An Effective Steward</b></p> <ul style="list-style-type: none"> <li>• Know the employees you represent</li> <li>• Know how to use the Collective Bargaining Agreement, the Statute, and your Local Constitution and By-Laws.</li> <li>• Give pertinent information when a member asks for it.</li> <li>• Keep your fellow employees informed and let them know the source of your information.</li> </ul>	<p>Instructor's Note: Emphasize the need for follow-up to the member and to the Chief Steward and/or Local Leadership</p>	

### Work Group Roster

NAME	DEPARTMENT/ POSITION	MEMBER (Y/N)	WORK #/ HOME #	HOME EMAIL	COMMENTS

**SAY:** Turn to page 6 in your PW. As a steward your primary role is to know and develop a relationship with the members and employees you represent. Map out the work area so that you know your unit: including who the informal leaders are, your activists, your antiunion employees, problem areas, etc.  
 This can help you with organizing drives, mobilization efforts, bargaining campaigns, and mobilization.  
 ASK participants to begin to map out their work unit on page 6 in the Participant Workbook.  
 ASK for volunteers to REPORT BACK some of the key individuals and where they work.



### How To Be An Effective Steward

- Meet new employees early, inform them, educate them, help them become members; get them to be active not just dues payers.



**REVIEW the slide.**  
**SAY:** new employee orientation is one, if not the, most effective way to strengthen the union by increasing membership and getting new people involved in the union.



### How To Be An Effective Steward

Tips for initial face-to-face contact

- Make contact at the right time. (The sooner the better, preferably at a New Employee Orientation)
- Introduce yourself.
- Make eye contact.
- Be polite, frank and don't "preach".
- Listen to employee.




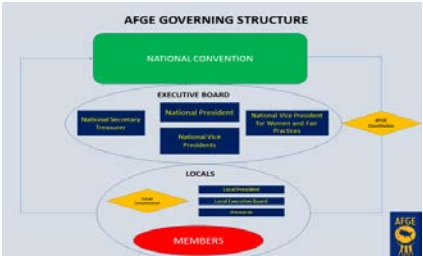
**REVIEW the slide.**  
**CONDUCT** a role play.  
**ASK** for two volunteers (one could be the instructor). Have one act as the Union Steward and the other should be a new employee who has heard bad things about unions either from another employee or their family.  
**DEBRIEF** what worked and what other methods could be effective in this situation.



### How To Be An Effective Steward

- A Steward isn't expected to know all the answers, but must be the type of person who enjoys finding them.
- Don't be afraid to ask questions, and to keep asking them.
- If you have questions or problems, don't be afraid to use the phone or visit an experienced Steward or Officer.

**REVIEW the slide.**  
**SAY:** Become known as someone who asks when you don't know, rather than someone who tries to bluff or hide.  
**SAY:** Your goal is to be the best Steward or Activist that you can be. Always strive for this goal. Excellence has no substitute.

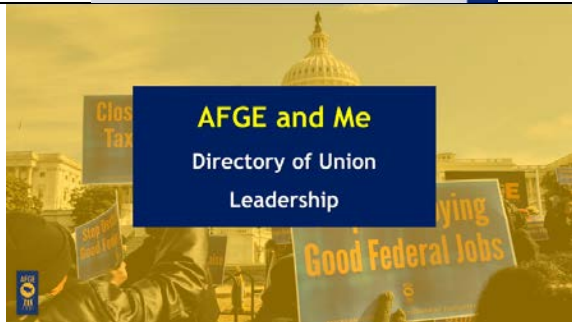
 <p><b>How To Be An Effective Steward</b></p> <ul style="list-style-type: none"> <li>• Become known as someone who asks when you don't know, rather than someone who tries to bluff or hide.</li> <li>• Remember your goal is to be the best Steward or Activist that you can be. Always strive for this goal. Excellence has no substitute.</li> </ul>	<p><b>REVIEW</b> the slide.</p>	
 <p><b>How To Be An Effective Steward</b></p> <ul style="list-style-type: none"> <li>• Be proud of your position and serve your members well.</li> <li>• As a Local representative you are affiliated with the support of tens of thousands of AFGE Union members.</li> </ul>	<p><b>REVIEW</b> the slide.</p> <p><b>SAY:</b> You are not alone as a Steward, there are many resources available through your Local, your District and through AFGE and the broader labor movement. We will now look at how all these parts work together.</p>	
 <p><b>AFGE ORGANIZATIONAL STRUCTURE</b></p> <p><b>LOCAL UNION</b></p> <ul style="list-style-type: none"> <li>Local Constitution</li> <li>Local President</li> <li>Executive Board</li> <li>Stewards</li> <li>MEMBERS</li> </ul>  <p><b>AFGE GOVERNING STRUCTURE</b></p> <ul style="list-style-type: none"> <li>NATIONAL CONVENTION</li> <li>EXECUTIVE BOARD       <ul style="list-style-type: none"> <li>National Secretary/Treasurer</li> <li>National President</li> <li>National Vice President</li> <li>National Vice President for Workers and Job Members</li> </ul> </li> <li>LOCALS       <ul style="list-style-type: none"> <li>Local Constitution</li> <li>Local President</li> <li>Local Executive Board</li> <li>Stewards</li> <li>MEMBERS</li> </ul> </li> </ul>	<p><i>Instructor Note: Refer participants to Chapter 1, page 11 in their AFGE Steward Handbook. Give a mini lecture (lecturette) on AFGE's organizational structure.</i></p> <p><i>Emphasize the importance of the democratic structure of the union: members vote on the officers, vote on changes to the CBL and budget.</i></p> <p><i>Make the connection between the relationship between the local, district, council, and national. Discuss how each of these organization are potential resources for you and your local and discuss the proper protocol to follow to seek assistance.</i></p> <p><i>Give participants an opportunity to share what they know about the structure. For example, when you talk about the convention, ask the participants how often the convention is held. Discuss the purpose and importance of the convention, who the officers are at the national and district level and their responsibilities, the role of the staff, when elections are held for national officers, etc.</i></p> <p><b>SHOW:</b> <a href="http://www.afge.org/?Page=ContactAFGE">http://www.afge.org/?Page=ContactAFGE</a> where the class can find information about the officers, districts, and councils.</p> <p><b>ASK:</b> Before proceeding, is there anything that I can clarify about our union structure?</p>	



**SAY:** As a Steward, you need to become familiar with your own union structure and resources.

**SAY:** Complete page 7 in your Participant Workbook.

*Instructor Note:* Ask for a volunteer to describe their union leadership structure at the local level based on the exercise. Solicit answers on who the national officers are and see if anyone can identify the leaders of the National and/or local AFL-CIO associations.



**ASK:** What does AFL-CIO stand for? How does it relate to AFGE and the work that you do as a steward?


**SAY:** AFGE is a member of the American Federation of Labor and the Congress of Industrial Organizations (AFL-CIO, the largest federation of unions in the United States, made up of 56 national and international unions, together representing more than 12.5 million workers.

**SAY:** National unions and their locals can affiliate with their state federation or Central Labor Council (CLC). It is usually at the CLC level that locals and their members mobilize around organizing campaigns, etc.



**SAY:** CLCs and Area Labor Federations (ALFs) tend to focus on county or city lobbying, elections, zoning, economic issues, and local needs.






**SAY:** State AFL-CIO or State Federations tend to focus on state legislative lobbying, economic policy, elections, and other statewide issues. Both state and local bodies work to mobilize members around campaigns, electoral politics, lobbying, strikes, picketing, boycotts, and similar needs.





**SAY:** Constituency Groups are non-profit, nonpartisan organizations chartered and funded by the AFL-CIO to enhance the representational effectiveness of various under-represented groups. Usually they serve as a means to enhance the organizing of new members and as





	<p>voter registrations and mobilization bodies. Examples of these groups include the A. Phillip Randolph Institute, Alliance for Retired Americans.</p> <p><b>SAY:</b> Allied Groups are independent organizations that wish to work closely with the AFL-CIO and promote its missions and goals. Such groups include JWJ – Jobs with Justice, IWJ – Interfaith Worker Justice.</p> <p><b>SAY:</b> Complete page 8 in your Participant Workbook.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Answers:</u></p> <ol style="list-style-type: none"> <li>1. AFL-CIO</li> <li>2. State Federations</li> <li>3. Central Labor Councils and Area Labor Federations</li> <li>4. Affiliates</li> <li>5. Constituency Groups</li> </ol> <p>Allied Groups</p>	
	<p><b>STEWARD COMMUNICATION SKILLS:</b> <b>Anti-Union Myth Discussion</b></p> <p><b>SAY,</b> as a Steward you are the front line for the Union in your workplace. Effective stewards focus on providing a positive image for the union. One major role of a steward is to inform employees on what the union is doing and also working to motivate bargaining unit employees to become involved in the union.</p> <p><b>SAY,</b> one major challenge for stewards are the many myths about unions in the workplace. Let's take a look at one example and discuss approaches to dispelling this myth.</p>	
<p>A bargaining unit member comes up to you and says that he doesn't ever want to join the Union because:</p> <p>"Unions protect the lazy, the people who should be fired..."</p>	<p><b>"Unions protect the lazy, the people who should be fired..."</b></p> <p><b>ASK</b> the class for suggestions on how they would respond.</p> <p><u>Instructor Note:</u> emphasize the following points:</p> <ul style="list-style-type: none"> <li>• Unions do much more than represent guilty members;</li> <li>• Unions are required by law to represent all employees.</li> </ul> <p>Unions can assist the Agency in providing a safe, productive workplace that is more effective at serving the public. That is why Congress enacted the Statute.</p>	










	<p><b>SAY</b>, now that we have talked about our union structure and the resources it provides, let's take a look at the law that codifies the right for federal employees to join and participate in a Union. This law, 5 USC Chapter 71, commonly referred to as the <i>Statute</i>, describes the role and responsibilities of both the Union and the Agency.</p>	
<p>The Civil Service Reform Act of 1978 led to the creation of Title 5 U.S. Code Chapter 71.</p> <p>Agencies and Unions commonly refer to it as "the Statute" as it defines the legal framework for federal labor relations.</p>	<p><b>SAY</b>, federal employees and their allies from other Unions fought for many years to have the right to unionize in the federal sector. After several attempts, the Civil Service Reform Act of 1970 led to the enactment of the Statute which is enforced by the Federal Labor Relations Authority, often referred to as the FLRA or the Authority.</p> <p><b>ASK</b>, if anyone in the class has heard of the Statute or the FLRA?</p> <p><b>DEBRIEF</b> the responses. If some participants are familiar with the document, ask for a volunteer to describe what experiences they had using it or how they learned about it.</p>	
<p>The Statute establishes the rules for:</p> <ul style="list-style-type: none"> <li>• Union representation</li> <li>• Information requests</li> <li>• Collective bargaining</li> <li>• Standards for labor organizations</li> <li>• Unfair Labor Practices (ULPs)</li> </ul>	<p><b>SAY</b>, many duties you perform as a Steward, whether it is attending a meeting with management, representing an employee at a grievance meeting, or negotiating a change in the workplace with the supervisor, are regulated by the Statute. It is important to know what you can do and often times, what the Agency cannot do, so that you can be effective in your work as a Steward.</p> <p><b>REVIEW</b> the list of items on the slide. <b>INFORM</b> the class that they will now have a chance to learn more about each of these items by completing an exercise that will take them through the Statute.</p>	
<p>Exercise: What's in the Statute?</p> 	<p><b>DIRECT</b> the students to have both the Statute handout and the Participant Workbook page 9 through 17 ...in front of them to do the Exercise.</p> <p><i>Instructor's Note: Depending on the size of the class, this exercise can be conducted as a team or individual exercise with questions divided out evenly.</i></p>	





<p style="text-align: center;"><b>Learning Activity: What's in the Statute</b></p> <ol style="list-style-type: none"> <li>1. Grab your Participant Workbook.</li> <li>2. Research the assigned questions using the 5 USC Chapter 71 handout.</li> <li>3. Write down the answer to your assigned question(s).</li> <li>4. Identify the citation and the page number where the answer is located.</li> <li>5. Summarize the answer whenever possible (use plain language and bullets)</li> </ol>  	<p><b>ASSIGN</b> each participant to work on a specific question as an assignment (in pairs/teams if possible).</p> <p><b>REVIEW</b> the directions on the slide.</p> <ul style="list-style-type: none"> <li>• Go to page 9 though 17 of the <u>Participant Workbook</u>.</li> <li>• Research the assigned questions using the <u>5 USC Chapter 71 handout</u>.</li> <li>• Write down the answer to your assigned question(s).</li> <li>• Identify the citation and the page number where the answer is located.</li> <li>• Summarize the answers when possible (<i>use plain language and bullets</i>)</li> </ul> <p><i>Instructor's Note: You can run through the exercise with the participants responding using the CHAT or give the keyboard/mouse control to directly place answers on the screen (the Participant Workbook would be on the instructor's desktop on page</i></p>	
<p><b>1. Why did Congress enact a law establishing the right of employees to organize, bargain collectively, and participate in unions in the Federal Sector?</b></p> <p style="text-align: center;">Citation: § 7101(a)</p> 	<p><b>ASK</b>, the class look up the answer to question #1. Have them post responses in the CHAT/SCREEN.</p> <p><u>Citation:</u> § 7101(a) <u>Page:</u></p> <p>DEBRIEF responses.</p>	
<p><b>1. Why did Congress enact a law establishing the right of employees to organize, bargain collectively, and participate in unions in the Federal Sector?</b></p> <ul style="list-style-type: none"> <li>• Safeguards the public trust</li> <li>• Contributes to effective public business</li> <li>• Facilitates and encourages settlement of disputes</li> </ul> 	<p><b>REVIEW</b> the main points on the slide, emphasize any items that were not discussed in the earlier debrief.</p>	
<p><b>2. What rights do employees have?</b></p> <p style="text-align: center;">Citation: § 7102</p> 	<p><b>ASK</b>, the class look up the answer to question #2. Have them post responses in the CHAT and/or SCREEN?</p> <p><u>Citation:</u> § 7102 <u>Page:</u></p> <p>DEBRIEF responses.</p>	





<p>2. What rights do employees have?</p> <ul style="list-style-type: none"> <li>To <u>form</u>, <u>join</u>, or <u>assist</u> any labor organization, or to <u>refrain</u>, freely and without fear of penalty or reprisal.</li> <li>To <u>act</u> for a labor organization in the capacity of a representative and to present the views of the labor organization</li> <li>To <u>engage</u> in collective bargaining</li> </ul> 	<p><b>REVIEW</b> the main points on the slide, emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, as a Union representative you have a legal right and duty to act and speak out on behalf of your members and your Local.</p> <p><b>SAY</b>, when acting as a Union representative you are considered to be on an equal legal standing with management.</p>	
<p>3. What is a “grievance”?</p> <p>Citation: §7103(a)(9)</p> 	<p><b>ASK</b>, the team to report the answer to question #3. Have them post in the CHAT and/or SCREEN?</p> <p><u>Citation</u>: § 7103(a)(9) <u>Page</u>:</p> <p><b>DEBRIEF</b> responses</p>	
<p>3. What is a “grievance”?</p> <p>Any complaint -</p> <ul style="list-style-type: none"> <li>by an <u>employee</u> concerning any matter relating to the employment of the employee;</li> <li>by any <u>labor organization</u> on any matter relating to the employment of any employee; or the effect or interpretation, or a <u>claim of a breach of the CBA</u>; or <u>affecting conditions of employment</u>;</li> <li>by any <u>employee</u>, <u>labor organization</u>, or <u>agency</u> concerning - the effect or interpretation, or a claim of breach, of a CBA; or law, <u>rule or applicable regulation</u>.</li> </ul> 	<p><b>REVIEW</b> the main points on the slide, emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, the Statute specifically provides for grievances by the employee, the union and the agency. Grievances can be filed at the Local and/or Council level, depending on the collective bargaining agreement.</p>	
<p>4. What is a “collective bargaining”?</p> <p>Citation: § 7103(a)(12)</p> 	<p><b>ASK</b>, the team to report the answer to question #4. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7103(a)(12) <u>Page</u>:</p>	

<p><b>4. What is a “collective bargaining”?</b></p> <p>Performance of the <u>mutual obligation</u> of the representative of an agency and the exclusive representative...to meet at reasonable times and to <u>consult and bargain in good faith</u> effort to reach agreement with respect to the conditions of employment... and to execute... a <u>written document</u> incorporating any collective bargaining agreement (CBA) but this does not compel either side to agree to a proposal or make a concession...</p> 	<p><b>REVIEW</b> the main points on the slide, emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, there are several key item included in this definition. One is “good faith” bargaining, we will talk about this more later. It is important to know that the Federal Labor Relations Authority (FLRA) determines what is and what is not “good faith”. The other is that while a written contract is not a requirement, it becomes one when either side asks for it in writing</p>	
<p><b>5. What are 3 examples of a “conditions of employment”?</b></p> <p>Citation: § 7103(a)(14)</p> 	<p><b>ASK</b>, the team to report the answer to question #5. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7103(a)(14) <u>Page</u>:</p>	
<p><b>5. What are 3 examples of a “condition of employment”?</b></p> <ul style="list-style-type: none"> <li>• Personnel policies</li> <li>• Personnel practices</li> <li>• Personnel matters</li> </ul> 	<p><b>REVIEW</b> the main points on the slide, emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, conditions of employment are very broad with only a few exceptions – Hatch Act prohibitions on political activity, classification systems (which is handled by OPM), and any other items covered under Federal statute.</p>	
<p><b>6. List 4 rights the Agency does not have to negotiate with the Union:</b></p> <p>Citation: § 7106(a)</p> 	<p><b>ASK</b>, the team to report the answer to question #6. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7106(a) <u>Page</u>:</p>	

<p>6. List 4 rights the Agency does not have to negotiate with the Union:</p> <ul style="list-style-type: none"> <li>• <u>Determine</u> the mission, budget, organization, number of employees and internal security practices</li> <li>• <u>Hire</u>, assign, direct, layoff, retain and discipline</li> <li>• <u>Assign</u> work, contract out</li> <li>• <u>Take action during emergencies</u></li> </ul> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, this section of the Statute is commonly used by management to assert their authority. We will look at several other sections of the Statute which allow the Union the right to bargain over the impact and implementation of management rights.</p>	
<p>7. List 3 items the Union can negotiate with the Agency:</p> <p>Citation: § 7106(b)</p> 	<p><b>ASK</b>, the team to report the answer to question #7. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7106(b) <u>Page</u>:</p>	
<p>7. List 3 items the Union can negotiate with the Agency:</p> <p><i>Permissive topics:</i></p> <ul style="list-style-type: none"> <li>• At the <u>election of the agency</u> - number, types, and grades of employees or positions assigned or the technology, methods, and means of performing work</li> </ul> <p><i>Impact and Implementation (I &amp; I):</i></p> <ul style="list-style-type: none"> <li>• <u>Procedures</u> which management officials observe in exercising any authority</li> <li>• <u>Appropriate arrangements for employees adversely affected</u> by the exercise of any authority by management officials.</li> </ul> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, there are three key aspects of 7106(b). <b>SAY</b>, under (b)(1) the Agency can decide to bargain over several items, such as technology, work assignments, means and methods of doing work. But they can also say no to bargaining. These are called the "permissive" topics of bargaining.</p> <p><b>SAY</b>, the most important part for us as a Union is 7106(b)(2) and (b)(3) – this allows the Union to bargain over how management does something and allows us to help employees who may be hurt by a management action – such as moving an office or changing a work procedure. 7106(b)(2) and (b)(3) is commonly referred to as "impact and implementation" or I and I bargaining</p>	


<p><b>8. Who is the Union required to represent and negotiate for:</b></p> <p>Citation: §7114(a)(1)</p> 	<p><b>ASK</b>, the team to report the answer to question #8. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation:</u> § 7114(a)(1) <u>Page:</u></p>	
<p><b>8. Who is the Union required to represent and negotiate for:</b></p> <p><u>All employees in the bargaining unit, whether or not they are members of the Union.</u></p> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, under this section of the Statute, all employees are required to be represented by the Union – regardless of whether or not they are members. This is commonly referred to as the Union’s duty of fair representation or DFR.</p>	
<p><b>9. When must the Agency provide the Union with the opportunity to represent employees:</b></p> <p>Citation: §7114(a)(2)</p> 	<p><b>ASK</b>, the team to report the answer to question #9. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation:</u> § 7114(a)(2) <u>Page:</u></p>	
<p><b>9. When must the Agency provide the Union with the opportunity to represent employees:</b></p> <p>1. <u>Any formal discussion between one or more representatives of the agency and one or more employees in the unit or their representatives concerning any grievance or any personnel policy or practices or other general condition of employment.</u></p> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, section 7114(a)(2) of the Statute is very important for Stewards as it clearly defines two areas where the Union has the right to represent employees; <b>formal meetings and Weingarten investigations.</b></p> <p>Section 7114(a)(2)(A) of the Statute describes a formal meeting – such as when a component changes a work process. The Union has the right to be at this meeting and it sets the foundation for bargaining. Even if the agency is exercising its management right – the union can bargain over its impact and implementation. Review your contract to see what it says about formal meetings.</p>	

<p><b>9. When must the Agency provide the Union with the opportunity to represent employees:</b></p> <p>2. <u>Any examination of an employee</u> in the unit by a representative of the Union in connection with an <u>investigation</u> if -</p> <ul style="list-style-type: none"> <li>• the employee reasonably believes that the examination may result in disciplinary action against the employee; and</li> <li>• the employee requests its representation</li> </ul> 	<p><b>SAY</b>, Section 7114(a)(2)(B) of the Statute states that when an employee is investigated for possible disciplinary action they have the right to have a union representative present. This right is known as a <b>Weingarten right</b>. We will discuss this in more detail in Section 2 of this online training series.</p> <p><b>ASK</b>, has anyone represented someone or been involved in a situation that was a Weingarten meeting?</p> <p><b>SAY</b>, the key thing to note is that the employee must request the union to be present, if they do not, they have waived their rights.</p>	
<p><b>10. Describe 2 requirements for “good faith” negotiations:</b></p> <p>Citation: 57114(b)</p> 	<p><b>ASK</b>, the team to report the answer to question #10. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7114(b)</p> <p><u>Page</u>:</p>	
<p><b>10. Describe 2 requirements for “good faith” negotiations:</b></p> <p>Citation: 57114(b)</p> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, this section of the Statute lists several conditions for good faith bargaining. If the Union or the Agency sees that the other side is not meeting these conditions, they can file an Unfair Labor Practice or ULP with the Federal Labor Relations Authority.</p> <p><u>Instructor Note</u>: briefly review the items on the next several slides but they do not have to be discussed in length except for (b)(4) for Information Requests.</p>	
<p><b>10. Describe 2 requirements for “good faith” negotiations:</b></p> <ul style="list-style-type: none"> <li>• Approach negotiations with a <u>sincere resolve to reach agreement</u></li> <li>• Be prepared to <u>discuss and negotiate on any condition of employment</u>.</li> <li>• Meet at <u>reasonable times and places</u> as frequently as necessary and to <u>avoid unnecessary delays</u>.</li> </ul> 	<p><b>SAY</b>, 7114(b)(4) is important for Stewards because it gives the Union the right to request information from the Agency and the Agency has to respond. This requirement applies to bargaining, grievances and formal meetings.</p> <p><b>SAY</b>, the key points that the Union has to show in a written request is that the information is normally maintained by the agency, is reasonably available and necessary for the union to properly represent the employees.</p>	

<p><b>10. Describe 2 requirements for “good faith” negotiations:</b></p> <ul style="list-style-type: none"> <li>In the case of the agency, furnish data to the union upon request and to the extent not prohibited by law (request for information): <ul style="list-style-type: none"> <li>Data which is normally maintained by the agency in the regular course of business</li> <li>Reasonably available and necessary for full and proper discussion, understanding and negotiation of subjects within the scope of bargaining, and</li> <li>Which does not constitute guidance, advice, counsel or training provided for management officials or supervisors, relating to collective bargaining</li> </ul> </li> </ul> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, this section of the Statute lists several conditions for good faith bargaining. If the Union or the Agency sees that the other side is not meeting these conditions, they can file an Unfair Labor Practice or ULP with the Federal Labor Relations Authority.</p> <p><u>Instructor Note</u>: briefly review the items on the next several slides but they do not have to be discussed in length except for (b)(4) for Information Requests.</p>	
<p><b>10. Describe 2 requirements for “good faith” negotiations:</b></p> <ul style="list-style-type: none"> <li>If an agreement is reached, to <u>execute</u> on the request of any party to the negotiation a <u>written document</u> embodying the agreed terms and to take such steps as necessary to <u>implement</u> such <u>agreement</u>.</li> </ul> 	<p>[This slide is optional]</p> <p><i>Instructor Note: If this was covered in the earlier section of the course (see definition for Collective Bargaining) than it can be skipped.</i></p>	
<p><b>11. Describe 2 actions that would be an Unfair Labor Practice (ULP) by the Agency:</b></p> <p>Citation: §7116(a)</p> 	<p><b>ASK</b>, the team to report the answer to question #11. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7116(a) <u>Page</u>:</p>	
<p><b>11. Describe 2 actions that would be an Unfair Labor Practice (ULP) by the Agency:</b></p> <ul style="list-style-type: none"> <li>To <u>interfere, restrain, or coerce any employee</u> in the exercise of any right under this chapter</li> <li>To <u>encourage, discourage membership in any labor organization</u> by discrimination in hiring, tenure, promotion or other conditions of employment</li> <li>to sponsor, control, or otherwise assist any labor organization</li> </ul> 	<p><b>REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, the Union has two avenues to address issues with the agency. One is to file a grievance using the Collective Bargaining Agreement. The other is to file an Unfair Labor Practice with the FLRA.</p> <p><b>SAY</b>, this section lists the various ways the Agency can violate the Statute and the Union can file a ULP to address the situation.</p> <p><u>Instructor Note</u>: briefly review the items on the slides but they do not have to be discussed in length unless there are specific questions or concerns that need to be clarified. Solicit questions as needed to determine comprehension.</p>	



<p>11. Describe 2 actions that would be a ULP by the Agency:</p> <ul style="list-style-type: none"> <li>to <u>discipline</u> or otherwise <u>discriminate</u> against an employee because the employee has filed a complaint, affidavit, or petition, or has given any information or testimony under this chapter;</li> </ul>	<p><b>SAY</b>, it is a ULP for the agency to attempt to intimidate or discriminate against an employee for acting in their role as a union steward.</p>	
<p>11. Describe 2 actions that would be a ULP by the Agency:</p> <ul style="list-style-type: none"> <li>to <u>refuse to consult or negotiate in good faith</u>, as required</li> <li>to <u>fail or refuse to cooperate</u> in impasse procedures and decisions as required</li> <li>to <u>enforce any rule or regulation in conflict</u> with an applicable collective bargaining agreement</li> <li>if the agreement was in effect before the rule or regulation</li> <li>to <u>other fail or refuse to comply with the Statute.</u></li> </ul>	<p><b>SAY</b>, it is a ULP for the agency to enforce a rule or regulation that is in conflict with a collective bargaining agreement, if the rule or regulation occurs after the effective date of the CBA. Once the CBA expires, that rule or regulation can take effect.</p> <p><i>Instructor Note: Indicate that the Agency can also file an Unfair Labor Practice against the Union for violating the elements of 7116(b).</i></p>	
<p>12. What is the primary document for grievance &amp; arbitration:</p> <p>Citation: §7121(a)</p>	<p><b>ASK</b>, the team to report the answer to question #17. Have them post responses in the CHAT and/or SCREEN.</p> <p><b>DEBRIEF</b> responses.</p> <p><u>Citation</u>: § 7121(a) <u>Page</u>:</p>	
<p>12. What is the primary document for grievance &amp; arbitration:</p> <p>The Collective Bargaining Agreement (CBA) between the Agency and the Union.</p>	<p><b>QUESTIONS #12 REVIEW</b> the main points on the slide. Emphasize any items that were not discussed in the earlier debrief.</p> <p><b>SAY</b>, under the Statute, the Agency and the Union are required to negotiate a grievance and arbitration process.</p> <p><b>SAY</b>, review your Collective Bargaining Agreement to find your grievance and arbitration process. Along with the Statute, the CBA is one, if not the, most important document a Steward can use to represent employees.</p>	
	<p><b>SAY</b>, please review the scenario below and answer the questions to determine how you can use your role as a union steward to assist the member(s) with their situation.</p> <p><i>A member tells you that she and 3 other employees are always coughing and sneezing at work. She says their symptoms get better when they are out of the office. All of the employees work in a mold-infested office that has not been renovated for years.</i></p>	

<p>Roles, Rights, and Resources</p> <ul style="list-style-type: none"> <li>• A member tells you that she and 3 other employees are always coughing and sneezing at work. She says their symptoms get better when they are out of the office.</li> <li>• All of the employees work in a mold-infested office that has not been renovated for years.</li> </ul> 	<p><b>Instructor Note:</b> Split the class into groups to answer the following four questions. Page 18 in the PW</p>	
 <p>Roles, Rights, and Resources</p> <ul style="list-style-type: none"> <li>• What type of problem is the employee raising?</li> <li>• What actions can you take as a Steward to help?</li> <li>• What rights do you have under the Statute to help these members?</li> <li>• What resources are available to help with this situation?</li> </ul>	<p><b>Instructor Note:</b> Split the class into groups to answer the following four questions.</p> <p><b>Debrief.</b> Refer the participants to the information already covered in the course (Statute, AFGE resources, AFL-CIO, Steward Handbook, etc.).</p> <p><b>Discuss</b> the role of COSH (Committee of Occupational Safety and Health) groups – COSH groups are private, non-profit coalitions of labor unions, health and technical professionals, and others interested in promoting and advocating for worker health and safety. For more info:  <a href="http://www.coshnetwork.org">www.coshnetwork.org</a></p>	
<p><b>Which Hat Do You Identify With and Why?</b></p> 	<p><b>Say:</b> As stewards, you wear many different hats in the work that you do. Which “hat” or role do you identify most with and why?</p> <p>*Allow participants to discuss</p>	
<p><b>Steward's Roles</b></p> <ul style="list-style-type: none"> <li>• Worksite Leader</li> <li>• Educator &amp; Communicator <ul style="list-style-type: none"> <li>• Organizer</li> </ul> </li> <li>• Legislative &amp; Political Activists</li> <li>• Problem Solver</li> </ul>	<p><b>Say:</b> Here are some typical roles that Stewards play in their work (read slide).</p>	



**SAY:** Turn to page 19 in the PW. As activists and stewards, you are a leader in AFGE. Successful leaders have certain qualities which allow them to motivate others. To explore this, let's view a clip from Remember the Titans: [Give YouTube address and indicate they can find it also by searching by the title '**Attitude Reflects Leadership**']:  
[https://www.youtube.com/watch?v=guA\\_4AzXqh0&list=PLnY1508ZqZy2ftWzujJIX0edBiznR--NR&index=1](https://www.youtube.com/watch?v=guA_4AzXqh0&list=PLnY1508ZqZy2ftWzujJIX0edBiznR--NR&index=1)

**SAY:** Raise your Hand when You have finished with the clip.

*Instructor Note:* Prior to showing the clip, ascertain how many people are familiar with the movie. As needed, provide background:

**Film Title & Synopsis:** *Remember the Titans (2000)*. Based on true events in Alexandria, VA in 1971. Under court order to integrate the school system, a black high school and a white high school were merged into one school, T.C. Williams High School. Herman Boone (Denzel Washington), an outsider who is Black, is hired as the new head football coach, displacing the previous coach, Bill Yoast (Will Patton), who is White, victorious, and popular. Yoast, who was a candidate for the head coach position, reluctantly agrees to stay on as assistant coach. Everyone wants a winning football team. The story is about the relationships among the students and among the adults, as the town and team struggle with integration.

**Clip Setup:** Gerry Bertier (Ryan Hurst), leader of the White team members and Captain of the team, and Julius Campbell (Wood Harris), leader of the Black players, accidentally run into one another at the water fountain during practice. The conversation they have raises a number of issues about perception, prejudice, motivation, and leadership.

**Attitude Reflects Leadership**


- Julius asks Gerry if, as a Captain, he was also a leader and Gerry says yes. Do you agree with this? Why or why not?
- Julius has a bad attitude about the team: is this a reflection or poor leadership?
- What can you do to be a leader?
- How can you manage your attitude during challenging times?

*Instructor Note:* Be sure to define Leaders as those who have followers and the importance of leading those followers with integrity.

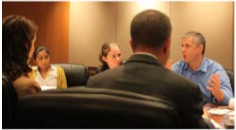



**Lead a discussion on the question on the slide. Have the participants respond through HAND RAISE/CHAT.**





*Instructor's Note:* After the review, emphasize that as a leader, your "attitude" is always being watched and you have to make sure that it is reflective of positive and effective leadership.

**SAY:** As leaders, there are some leadership traits, which have already been pointed out, that you need to make sure you exhibit. Identify skills that makes an effective leader. These traits will not only help you prepare for your current union leadership role but will also help build relationships with those that you represent.

		
<ul style="list-style-type: none"> <li>Scenario 1: You are the chairperson of your local's membership committee. You just found out that one of the other members of your committee got caught signing up a member on duty time. The committee member, during a meeting of the committee, disrupts the meeting and loudly tells you that you don't have the guts to do what he did. How might you deal with that person?</li> </ul>	<p>Read slide and discuss</p>	
<ul style="list-style-type: none"> <li>Scenario 2: You've been asked by your local president to serve on your local's bargaining committee. While planning your local's proposals, an argument arises between two members of the committee. The argument concerns whether to propose a 4-10 or 5-4-9 compressed work schedule arrangement. What might you do to help resolve the issue and involve the disagreeing team members in the process?</li> </ul>	<p>Read slide and discuss</p>	
<ul style="list-style-type: none"> <li>Scenario 3: You've been appointed by your local's president to chair a labor and management health and safety problem-solving committee. One of the local's other Stewards comes to you and complains that he was not considered for the committee despite the fact that he has been interested in health and safety issues for years. He's concerned that some of the members of the committee are "Johnnie come lately" members who seem to be getting better treatment than long-time activists. As a local leader, how might you respond?</li> </ul>	<p>Read slide and discuss</p>	




<ul style="list-style-type: none"> <li>Scenario 4: You are the chairperson of the local's Legislative Action Fund Committee. As a result of your committee's actions, the local has been awarded a LAF certificate for its participation in the program. During a regular meeting of the local, and much to your surprise, the president calls you to the front of the room and praises your leadership of the committee. The local president turns to the membership and asks for a round of applause. How might you, as an effective leader, deal with that situation?</li> </ul>	<p>Read slide and discuss</p>	
<p><b>Steward Leadership Traits</b></p> <ul style="list-style-type: none"> <li>Listening to others</li> <li>Making others feel important</li> <li>Promoting a vision</li> <li>Following the "Golden Rule"</li> <li>Admitting mistakes</li> <li>Criticizing others only in private</li> <li>Staying close to the action</li> </ul>	<p>Read slide and discuss</p> <p>Page 20 in PW</p>	
<p><b>Problem Solver</b></p> 	<p>Say: So let's explore some of the things Stewards do in their problem solver role</p>	
<p><b>Problem Solver</b></p> <ul style="list-style-type: none"> <li>Identify the requirements of a formal meeting</li> <li>Determine when a situation involves Weingarten Rights</li> <li>Describe process and requirements for handling a grievance</li> <li>Discuss the basic criteria for an information request</li> </ul>	<p>(Read slide)</p>	

<p style="text-align: center;"><b>Formal Discussions</b></p> 	<p><b>Say:</b> What do you all know about formal discussions?  <b>SAY:</b> As we discussed in Session 1, under 5 USC Chapter 71 (the Statute), the Union has the right to attend formal meetings conducted by the Agency or its surrogates and the Agency has the responsibility to notify the Union of these meetings.</p> <p><b>ASK:</b> Has anyone been involved in a formal meeting since they participated in the Session 1 training?</p> <p><b>Debrief responses.</b></p>	
 <p style="text-align: center;"><b>Formal Discussions</b></p> <p>Criteria for a Formal Discussion:</p> <ul style="list-style-type: none"> <li>▪ Who is involved in the meeting?</li> <li>▪ Was there a "give and take" - were questions addressed?</li> <li>▪ Did the meeting concern 'conditions of employment'?</li> <li>▪ Did the meeting concern a grievance?</li> </ul>	<p><b>SAY:</b> Turn to page 21 in PW. The FLRA has four primary criteria for determining if a meeting is formal.</p> <p><b>NOTE:</b> Inform the participants that the materials tab includes additional FLRA guidance on formal meetings. If time permit, show the charts indicating Formal vs. Informal meetings and appropriate Union actions.</p>	
 <p style="text-align: center;"><b>Formal Discussions</b></p> <p>Union's Rights at a Formal Discussion</p> <ul style="list-style-type: none"> <li>▪ Asking questions related to matters under discussion at the meeting</li> <li>▪ Making relevant remarks concerning those matters</li> <li>▪ Stating the Union's position(s) on the matters under discussion</li> </ul>	<p><b>Review</b> the following Union rights at a formal meeting.</p> <p><b>Say</b> that disrupting or obstructing a meeting is not acceptable under the Statute (e.g. interrupting a supervisor who is speaking, shouting, etc.)</p>	
 <p style="text-align: center;"><b>How Formal is this Discussion?</b></p>	<p><b>SAY:</b> We will now look at several different scenarios to determine if these meet the requirements for a formal meeting.</p> <p><b>ASSIGN TEAMS</b> Turn to page 22 in pw. of 4-5 Participants to each question. Have each team be prepared to lead a discussion of the scenario question.</p>	


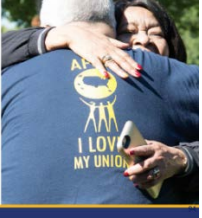


 <p><b>Formal Discussions: Yes or No?</b></p> <p>Terry's office is short-staffed because of a recent large turnover of employees. As the Steward for the office, he has expressed concern about the matter and manager promised new employees were to be hired for the entry-level jobs. Last week, three new employees showed up. A couple of days later, Terry overheard the new employees in the supervisor's office being briefed about parking policy, leave request issues, and frequency of performance ratings.</p>	<p><b>Debrief responses.</b></p> <p><u>ANSWER:</u> The meeting is a formal meeting. It is a new employee orientation, and under the Statute, the Union should have been given advance notice, the opportunity to attend, and the ability to present its views.</p> <p><u>NOTE:</u> New employee orientations are one of the most important opportunities for union leaders to greet new potential members. The Union should work to protect and take advantage of this opportunity.</p>	
 <p><b>Formal Discussions: Yes or No?</b></p> <p>Susan is a Steward who works with David. David has requested a meeting with the supervisor to review claims processing procedures since he's having trouble doing them correctly. Susan passes the supervisor's office and sees David being "walked-through" the claims process by the supervisor.</p>	<p><b>Debrief responses.</b></p> <p><u>ANSWER:</u> The meeting is not a formal discussion; it is typical discussion of daily work process.</p> <p><u>NOTE:</u> The tone of the meeting could change as it progresses. If David feels that the meeting has turned into an investigation that would lead to discipline, he has the right to ask for union representation at that time (Weingarten right).</p>	
 <p><b>Formal Discussions: Yes or No?</b></p> <p>One of the employees in Terry's office has filed a grievance, without his assistance, over an annual leave denial. One afternoon, Terry passes the supervisor's office and hears him discussing the leave issue with the employee.</p>	<p><b>Debrief responses.</b></p> <p><u>ANSWER:</u> The meeting is a formal discussion, a meeting regarding a grievance is considered formal under the Statute.</p>	
 <p><b>Formal Discussions: Yes or No?</b></p> <p>Dawn is representing an employee in a performance appraisal grievance. The grievance wasn't resolved and is scheduled for hearing at arbitration. Two weeks before the hearing, the grievant, Robert, tells Susan that the agency's attorney called him. Robert tells Susan the attorney asked about his performance and said from what he knew he wasn't that good a worker. He also told him that his case looked "weak." Robert says the agency's attorney was rude to him and he wants Susan to speak with him about being more considerate.</p>	<p><b>Debrief responses.</b></p> <p><u>ANSWER:</u> As with the last scenario, a meeting is a formal discussion, a meeting regarding a grievance is considered formal under the Statute. It does not matter if it was telephone call, it is still considered a formal meeting.</p>	










	<p>* Or give the employee a choice of (1) having the interview without representation or (2) ending the interview</p>	
<p style="text-align: right;">Problem Solver – Weingarten Rights</p>  <p><b>Weingarten Rules</b></p> <p><b>Rule 3:</b> Refusal to honor the request = Unfair Labor Practice (ULP)</p>	<p>o <b>Rule 3</b></p> <p>* If the supervisor refuses to honor the employee’s request and insists on the interview, she or he commits an Unfair Labor Practice. The FLRA may set results of the interview aside if the charge is upheld – the decision to set aside the results of a particular unlawful interview depends on the circumstances in each individual case. This is often included in the CBA as well, so a grievance would be another option.</p> <p><b>OPTIONAL Activity:</b> Individually, give participants 5 minutes to list ways a Steward can be helpful in being present for a Weingarten Interview.  <b>Debrief</b> the responses.</p>	
<p style="text-align: right;">Problem Solver – Weingarten Rights</p> 	<p><b>Review the scenarios in teams of 4-5.</b></p> <p>Activity: Weingarten or Not? –Using page 25 in their Participant Workbook, participants should determine if the affected employee has cause to invoke Weingarten Rights. After 5 minutes, discuss responses as a whole group.</p>	
<p style="text-align: right;">Problem Solver – Weingarten Rights</p>  <p><b>Weingarten or Not</b></p> <p>Last week, Malcolm had a verbal disagreement with his manager over an assignment. While he was walking to his desk today after lunch, the supervisor called Malcolm into his office to discuss the incident. During the course of the conversation, Malcolm asks for a Union Representative to attend the meeting. The supervisor refuses. <i>Is this a violation of his Weingarten Rights?</i></p> <p><i>What if anything should Malcolm do?</i></p>	<p><b>Debrief responses</b></p> <p><b>ANSWER:</b> Malcolm believes he could be disciplined and has requested representation. The supervisor’s refusal is a violation of the Statute under 7114(a)(2)(B).</p> <p>Malcolm should refuse to provide answers to the questions until a union representative is allowed and immediately go to the Union office after the meeting has ended.</p> <p><b>NOTE.</b> If the agency has given the employee the option of continuing an interview without representation or having no interview at all, and the employee elects to continue without representation, the employee has <b>WAIVED</b> the right to representation.</p>	





<p style="text-align: center;">Problem Solver – Weingarten Rights</p>  <p><b>Weingarten or Not</b></p> <p>John is called into the supervisor's office for a discussion of his work performance. John's Steward is out sick so John asks that the interview be delayed until his Steward returns.</p> <p><i>Is John entitled to representation? Does management have to wait until the requested Steward/Representative returns to work? Explain.</i></p>	<p><b>Debrief responses</b></p> <p><u>ANSWER:</u> It is not necessarily an investigation, however, it could turn into one if management is asking questions that could lead to discipline. Management does not have to wait until John's preferred steward is available if another union representative could perform the same function.</p>	
<p style="text-align: center;">Problem Solver – Weingarten Rights</p>  <p><b>Weingarten or Not</b></p> <p>You, an employee who happens to be a Union Steward, are called into the office to discuss an incident that occurred between you and between you and another employee.</p> <p><i>Are you entitled to union representation under the Statute? Why or why not?</i></p>	<p><b>Debrief responses</b></p> <p><u>ANSWER:</u> This is a violation of 7114(a)(2)(B). Your status as a Union Steward does not prevent you from having the same rights as any other employee under the Statute.</p>	
<p style="text-align: center;">Problem Solver – Weingarten Rights</p>  <p><b>Weingarten or Not</b></p> <p>Jane is called to her supervisor's office and questioned about a fight she witnessed between two other co-workers in her area.</p> <p><i>Is Jane required to have Union representation? Explain.</i></p>	<p><b>Debrief responses</b></p> <p><u>ANSWER:</u> Since Jane is not the subject of the investigation but a witness, she is not automatically entitled to representation. However, if at any point, she feels her testimony could lead to discipline, she should request Weingarten representation under 7114(a)(2)(B).</p>	
	<p><b>SAY;</b> Employees, with their elected representatives, come to an agreement with management on their working conditions through the collective bargaining process. If either side violates the agreement (CBA/MLA/etc.) or makes changes to the workplace and/or treats employees unfairly or in an unsafe manner, the Statute mandates a grievance procedure to resolve this situation.</p>	
<p><b>Grievances Defined</b></p> <p>Complaint by:</p> <ul style="list-style-type: none"> <li>▪ Employee</li> <li>▪ Union</li> <li>▪ Agency</li> </ul> 	<p><b>SAY:</b> All three parties covered under the Statute have rights under the grievance process (Employee, Union, Agency). Page 26 in PW.</p>	


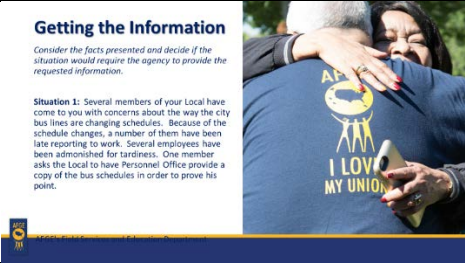



<p><b>Grievances Defined</b></p> <ul style="list-style-type: none"> <li>Any matter relating to employment</li> <li>Effect, interpretation, or claim of breach, of a collective bargaining agreement</li> <li>Law, rule or applicable regulation</li> </ul> 	<p><b>ASK:</b> participants to complete page 11 in their Participant Workbook.</p> <p><b>SAY:</b> a grievance can be filed by an <u>employee</u> on any matter related to employment.</p> <p><b>SAY:</b> a grievance can be filed by a union on any matter related to employment.</p> <p><b>SAY:</b> a grievance can be filed by an employee, union and/or agency on the effect, interpretation, or claim of breach of a collective bargaining agreement, law, rule, or applicable regulation.</p>	
<p><b>A Grievance Cannot Concern:</b></p> <ul style="list-style-type: none"> <li>Any claimed violation of Subchapter II of Title 5, United States Code (pertaining to prohibited political activities);</li> <li>Retirement, life insurance, or health benefits;</li> <li>Suspension or removal under Section 7532 of Title 5, United States Code (concerning national security);</li> </ul> 	<p><b>REVIEW</b> what a grievance cannot concern:</p> <ul style="list-style-type: none"> <li>Hatch Act</li> <li>Retirement, life insurance or health benefits</li> <li>Suspension or removal under national security</li> </ul>	
<p><b>A Grievance Cannot Concern:</b></p> <ul style="list-style-type: none"> <li>Any examination, certification, or appointment.</li> <li>Classification of any positions (does not result in the reduction in grade or pay of an employee)</li> <li>Any other matter the parties have agreed to exclude.</li> </ul> 	<p><b>REVIEW</b> what a grievance cannot concern:</p> <ul style="list-style-type: none"> <li>Examination, certification or appointment</li> <li>Classification</li> </ul> <p>Matters that have been agreed to be waived under the Collective Bargaining Agreement.</p>	
<p><b>5 USC Chapter 71 Subchapter III:</b></p> <p>Negotiated Grievance Procedure requirements:</p> <ul style="list-style-type: none"> <li>Fair and simple</li> <li>Provide for expeditious processing</li> <li>Assure the union the right to present and process grievances</li> <li>Assure the employee the right to present a grievance and assure the Union's right to be present during the proceeding.</li> </ul> 	<p><b>ASK:</b> participants to go to Subchapter III of the Statute.</p> <p><b>Review</b> what the Statute requires the grievance process to be:</p> <ul style="list-style-type: none"> <li>Fair and simple</li> <li>Provide for expeditious processing</li> <li>Assure the union the right to present and process grievances</li> <li>Assure the employee the right to present a grievance and assure the Union's right to be present during the proceeding.</li> </ul>	

<p>5 USC Chapter 71 Subchapter III:</p> <p>Negotiated Grievance Procedure requirements:</p> <ul style="list-style-type: none"> <li>Assure the employee the right to present a grievance and assure the Union's right to be present during the proceeding.</li> <li>Provide that any grievance not satisfactorily settled shall be subject to <u>binding arbitration</u>, that can be invoked by either the Union or the Agency.</li> </ul> 	<p>Review what the Statute requires the grievance process to be:</p> <ul style="list-style-type: none"> <li>Assure the employee the right to present a grievance and assure the Union's right to be present during the proceeding.</li> <li>Provide that any grievance not satisfactorily settled shall be subject to <u>binding arbitration</u> that can be invoked by either the Union or the Agency.</li> </ul> <p>ASK: the participants if they can file a grievance and a ULP on the same matter.</p>	
<p>Issues may be raised under the grievance procedure or as an unfair labor practice, but <u>not</u> under both procedures.</p> <p>5 USC 7116(d)</p> 	<p>Review slide as debrief</p>	
<p>Complaint, Grievance or ULP</p> 	<p>ASSIGN activity in teams or as a class. Page 27 in PW</p>	
 <p>Complaint, Grievance or ULP</p> <p>Robert comes to you to complain that he was injured on the job and the Workers Compensation program denied him benefits. Does he have a grievance? Why or why not?</p>	<p>Debrief responses</p> <p><u>ANSWER:</u> In the case of workers' compensation claims, they are approved or denied by the U.S. Department of Labor. Since the denial of Workers' Compensation is covered by a third-party outside of the Statute, it cannot be grieved.</p>	
 <p>Complaint, Grievance or ULP</p> <p>As the Union Representative, you were denied official time to organize a lunch and learn. Is this a grievance? Why or why not?</p>	<p>Debrief responses</p> <p><u>ANSWER:</u> Maybe, it depends on the collective bargaining agreement.</p>	





 <p><b>Complaint, Grievance or ULP</b></p> <p><small>Cynthia recently requested a temporary telework schedule to provide elderly care for her mother who just got out of the rest home. Her request was denied and she wants to file a grievance. Is this a grievance? Why or why not?</small></p>	<p><b>Debrief responses</b></p> <p><u>ANSWER:</u> Typically a grievance because telework cannot be used for elder care. The wording of the contract and the grievance has to be carefully reviewed and crafted to meet OPM requirements:</p> <p>Telework is not a substitute for dependent care. However, in keeping with the objectives of the <a href="#">Presidential Memorandum - Enhancing Workplace Flexibilities and Work-Life Programs</a>, telework is a valuable tool to individuals with caregiving responsibilities. Time saved commuting can be spent with family members, and the flexibility of being closer to home may enable caregivers to take less time off for activities like doctor's visits, school programs, etc. A teen-aged child or elderly relative might also be at home with the teleworker, after school or during the day, as long as they are independently pursuing their own activities.</p>	
 <p><b>Complaint, Grievance or ULP</b></p> <p><small>Jessie comes to you to complain that a manager just sexually harassed her. She went to the HR counselor but was told that it would take years to get a hearing. She wants the union to file a grievance now. Is this a grievance? Why or why not?</small></p>	<p><b>Debrief responses</b></p> <p><u>ANSWER:</u> This is a grievance, refer to the contract to determine if the grievance can hold in abeyance (temporarily suspended) while the EEO claim is being filed.</p>	
 <p><b>Complaint, Grievance or ULP</b></p> <p><small>You just received a letter from the agency that effective in two weeks, they are going to stop subsidizing the monthly parking fee. Is this a grievance? Why or why not?</small></p>	<p><b>Debrief responses</b></p> <p><u>ANSWER:</u> It depends on the contract. A grievance can be filed and the Local can submit a demand to bargain.</p>	
	<p><b>SAY:</b> now that we have reviewed what a grievance is, let's take a look at how we can best represent members using this process. Page 28 in the PW.</p>	






	<p><b>Grievance Handling Model</b></p> <ol style="list-style-type: none"> <li>1. Identification</li> <li>2. Investigation</li> <li>3. Documentation</li> <li>4. Preparation</li> <li>5. Presentation</li> </ol>	<p>Describe the 5 step process.</p> <p>ASK the class to define <u>'past practice'</u>.</p> <p>Discuss the responses.</p>	
	<p><b>1. Identification</b></p> <ul style="list-style-type: none"> <li>• Violation (e.g., CBA, policy, rule, regulation)</li> <li>• Time limits</li> <li>• Past Practice</li> </ul>	<p><b>SAY:</b> A grievance procedure is involved if there is either a violation of an article in the collective bargaining agreement, and/or agency policy, rule or regulation).</p> <p><b>ASK:</b> the class for examples of either existing or possible grievances using their local collective bargaining agreements.</p> <p>Debrief responses.</p>	
	<p><b>Past Practice</b></p> <p>Existing practices sanctioned by use and acceptance that are not specifically included in the CBA.</p>	<p>ASK the class for the definition and examples of a past practice.</p>	
	<p><b>Past Practice</b></p> <ul style="list-style-type: none"> <li>• Clear and consistent course of action</li> <li>• Reasonable duration</li> <li>• Full knowledge</li> <li>• Contract is silent or ambiguous</li> <li>• Employee harmed by change of practice (<i>Union must show</i>)</li> </ul>	<p>Debrief answers from the previous slide and note the following criteria:</p> <ul style="list-style-type: none"> <li>• clear and consistent course of conduct</li> <li>• activity over a reasonable period of time</li> <li>• both parties have full knowledge</li> </ul> <p>contract is silent or ambiguous</p>	


 <p><b>2. Investigation</b></p> <ul style="list-style-type: none"> <li>• Talking to the right person/people</li> <li>• 5 W's</li> <li>• Standardized Form</li> <li>• Follow up</li> </ul>	<p>Discuss the slide.</p> <p><i>Get the facts. Interview the employee and witnesses (if available) and document the 5 w's: Why, What, Where, When, Who. Ask open-ended questions to get complete responses. Be sympathetic and avoid making judgements. Avoid making promises about future action.</i></p> <p><i>Emphasize follow-up the grievant on the process and what's happened.</i></p> <p><b>ASK:</b> the class if they have been involved in conducting interviews with employees and to describe their experiences, what worked well, what didn't, any suggestions/recommendations for how to do it effectively?</p>	
 <p><b>3. Documentation</b></p> <ul style="list-style-type: none"> <li>• Physical Evidence</li> <li>• Particularized Need <ul style="list-style-type: none"> <li>○ Why</li> <li>○ How</li> <li>○ Relevancy</li> </ul> </li> </ul>	<p>Discuss the slide.</p> <ul style="list-style-type: none"> <li>• <i>Emphasize the need to document, document, and document. Having accurate and comprehensive documentation is the key to achieving the best outcome for the membership.</i></li> <li>• <i>Refer to USC Section 7114(b)(4) on particularized need.</i></li> </ul> <p>-</p> <p><i>Have students fill out page 29 of their Participant Workbook</i></p>	
 <p><b>Particularized Need</b></p> <p>Information requested must be:</p> <ul style="list-style-type: none"> <li>• <u>Normally maintained</u> in the regular course of business by the Agency</li> <li>• <u>Reasonably available</u></li> <li>• <u>Necessary</u></li> </ul>	<p>Discuss the slide and review the requirements for particularized need: Page 31 in PW.</p> <p><i>Normally maintained:</i></p> <ul style="list-style-type: none"> <li>• <i>Agency possesses and maintains data in regular course of work</i></li> <li>• <i>Has information within its control.</i></li> </ul> <p><i>Reasonably available:</i></p> <ul style="list-style-type: none"> <li>• <i>Not reasonable if it requires extreme or excessive means.</i></li> <li>• <i>Data must exist.</i></li> </ul> <p><i>Necessary:</i>  <i>All aspects of the union's representational duties (grievances, negotiations, contract administration)</i></p>	
 <p><b>Particularized Need</b></p> <p>Union cannot request information that is:</p> <ul style="list-style-type: none"> <li>• Under the Privacy Act</li> <li>• Collective bargaining guidance, advice, counsel, or training for management</li> <li>• Prohibited by other laws</li> </ul>	<p>Review the slide:</p> <p><i>Union cannot request information that is:</i></p> <ul style="list-style-type: none"> <li>• <i>Under the Privacy Act</i></li> <li>• <i>Collective bargaining guidance, advice, counsel, or training for management</i></li> <li>• <i>Prohibited by other laws</i></li> </ul>	

 <p><b>Getting the Information</b></p> <p>Close Call Tax Law</p> <p>Stop Destroying Good Federal Jobs</p>	<p>Have participants review the 4 scenarios on p. 32 in the Participant Workbook. Use the polling feature to have the participants vote to see if this would meet the particularized need standard under the Statute</p>	
 <p><b>Getting the Information</b></p> <p>Consider the facts presented and decide if the situation would require the agency to provide the requested information.</p> <p><b>Situation 1:</b> Several members of your Local have come to you with concerns about the way the city bus lines are changing schedules. Because of the schedule changes, a number of them have been late reporting to work. Several employees have been admonished for tardiness. One member asks the Local to have Personnel Office provide a copy of the bus schedules in order to prove his point.</p>	<p><u>ANSWER:</u> NO. Does not meet particularized need as the Agency does not normally maintain the bus schedule as part of its normal business.</p>	
 <p><b>Getting the Information</b></p> <p>Consider the facts presented and decide if the situation would require the agency to provide the requested information.</p> <p><b>Situation 2:</b> A member comes to you to ask for help with a proposed removal for unsatisfactory performance. The reason stated is that the member did not process the minimum vouchers during his performance improvement period. The member insists he did meet the requirement and that the records of his performance maintained in the Division will prove his claim.</p>	<p><u>ANSWER:</u> YES. Meets particularized need as the Agency normally maintains these records as part of its normal business.</p>	
 <p><b>Writing the Grievance</b></p> <ol style="list-style-type: none"> <li>1. Statement of grievance</li> <li>2. Statement of violation</li> <li>3. Statement of remedy</li> </ol>	<p>Discuss the slide.</p> <p><i>Statement:</i> Limit details to basic problems, violations, how the problem should be resolved. Do not limit contract violations (add the phrase ... 'and all other relevant articles of the contract'), avoid personal remarks (state the Union's view) and do not limit the remedy ('make the grievant whole in every way').</p>	
 <p><b>4. Preparation</b></p> <ul style="list-style-type: none"> <li>• Review</li> <li>• Research</li> <li>• Discuss with Other Stewards/Officers</li> <li>• Write the Grievance</li> </ul>	<p>Review the elements of preparation. Discuss case track as a possible resource, suggest contacting other stewards in the union (outside your local). Focus on the facts.</p> <p>Ask the class for experienced volunteers to provide suggestions on how to prep a grievant for the grievance meeting. Encourage members to be brief and to the point.</p>	



<p><b>4. Preparation</b></p> <ul style="list-style-type: none"> <li>• Prepare the Witness/Grievant</li> <li>• Anticipate Arguments</li> </ul> 	<p>Discuss the slide.</p> <p><i>Prepare the witness/grievant to stick to the facts and not engage in "what if", 'possibly' and/or 'maybe' answers or scenarios. Tell the members to say that they don't know, if they cannot remember or give a definite yes or no answer.</i></p> <p><i>Consider, with the grievant, how the other side will argue the case. Prepare a realistic response in line with the facts of the case</i></p>	
<p><b>5. Presentation</b></p> <ul style="list-style-type: none"> <li>• Remember, you are on equal ground</li> <li>• Attack the issue; not the individual</li> <li>• Take notes and document the agency's response</li> </ul> 	<p>Discuss the slide</p> <ul style="list-style-type: none"> <li>• <i>Remember, you are on equal ground</i></li> <li>• <i>Attack the issue; not the individual</i></li> </ul> <p><b>ASK</b> the class for any experiences they may have had in presenting a grievance – what worked and what they would do next time in a similar situation.</p>	
<p>Effective Grievance Writing</p> 	<p>Transition from title slide to <u>NVAC grievance examples</u> from Appendix B of the Participant Workbook or use other grievances as examples for the class.</p> <p><b>ASK</b> participants to review the grievances and identify any elements that make it effective.</p> <p>Debrief the responses.</p>	
<p><b>Grievance Writing Pointers</b></p> <ul style="list-style-type: none"> <li>•Consult the grievant throughout</li> <li>•Limit details to basic information</li> <li>•Don't limit contract violations</li> <li>•State the Union's position, not personal</li> <li>•Don't limit the remedy</li> <li>•File in a timely manner!</li> </ul> 	<p>Review writing pointers, using examples from the grievance discussion to reinforce the elements.</p>	

 <p>Grievance Writing Pointers</p> <ul style="list-style-type: none"> <li>•Solidarity</li> <li>•Feedback and more feedback</li> <li>•Plan for arbitration</li> </ul>	<p>Review writing pointers, using examples from the grievance discussion to reinforce the elements.</p>	
	<p><b>SAY:</b> A Local is most effective when the majority of employees are organized and involved in their Union. To gain support within the workplace, the union needs to be responsive to the needs of the members. Getting employees to join and act on behalf of the union gives the steward more political influence and leverage in working with the agency. If that support does not exist, the Agency has greater leeway to minimize its response to the union.</p>	
 <p>Your Local</p> <p>What is a one major issue that your members are, or should be, worried about?</p> <p>Why?</p>	<p><b>SAY:</b> Take a moment to think about your Local and the employees you represent.</p> <p><b>SAY:</b> Identify one (1) major issue that the members you represent are, or need to be, concerned about. Describe why.</p> <p><b>ASK</b> for volunteers to share what issues they face with their members. Note any issues that two or more participants have in common.</p>	
 <p>Issue Mobilization</p> <p>Describe 3 specific ideas to mobilize employees around this issue.</p> <p>Identify the resources that the Local will need to be successful.</p>	<p>Read Slide</p>	
 <p>Mobilization 3-2-1</p> <ul style="list-style-type: none"> <li>• Identify 3 ways to keep employees informed about what the Local is doing.</li> <li>• List 2 methods the Steward can use to get feedback from employees on current worksite problems, concerns, and celebrations</li> <li>• Describe 1 strategy to encourage Union involvement</li> </ul>	<p><b>SAY:</b> This slide presents a template for how to mobilize employees around an issue. Take the issue that you have identified and determine what your 3-2-1 action plan for mobilizing your worksite around this issue. Be prepared to briefly share what you have developed with the group.</p> <p>Debrief responses</p>	

	<p><b>SAY:</b> One of the most important jobs of the Union is to build an active, united membership in our workplace. Our ability to defend and improve conditions will always depend on the collective power of our membership.</p> <p><b>SAY:</b> One of the most important responsibilities of a steward is to recruit new members in the Local. Joining is the first step in building solidarity in the workplace.</p> <p><b>SAY:</b> Stewards should have a sufficient supply of 1187s on hand at all times. Keep employees informed of benefits associated with membership, union meetings, and Local union activities.</p> <p><b>SHOW</b> class the AFGE website on how to join:  <a href="https://www.afge.org/index.cfm?Page=BecomeAMember">https://www.afge.org/index.cfm?Page=BecomeAMember</a></p>	
<p><b>Local Union Best Practices</b></p> <ul style="list-style-type: none"> <li>• One advantage of a large membership</li> <li>• One disadvantage of a small membership</li> </ul>	<p><b>SAY:</b> As we discussed, the number of people you have involved matters to the union. Consider the following questions, page 41 in PW</p> <p><b>ASK</b> the class for their ideas on each item.</p> <p><b>Discuss and debrief the slide.</b></p>	
<p>Steward as Organizer</p> <p><i>The reason most non-members give for why they are not a member is that no one talked to them about the Union or told them why they should join.</i></p>	<p><b>ASK</b> the class if they were asked to join the Union and how they became involved.</p> <p><b>Debrief responses</b> and discuss the importance of having contact with someone in the Union</p>	
<p><b>Why Employees Don't Join (CESS)</b></p> <p>Cost</p> <p>Experience</p> <p>Status</p> <p>Security</p>	<p><b>SAY:</b> There are four main issues why employees do not join Unions:</p> <p><u>Cost</u>- where is my \$ going, I don't need to pay, it's a waste of #</p> <p><u>Experience</u> – I or someone I know has had a bad experience with unions</p> <p><u>Status</u> – Unions are for lazy people, lower-educated people, etc. – I will be seen as less than what I am</p> <p><u>Security</u> – I won't be promoted, management will come after me</p> <p><b>SAY:</b> Identifying why someone does not want to join and providing a different perspective can influence their decision on joining the Union.</p> <p><b>ASK</b> the class if they have had or encountered someone with one of these issues.</p> <p><b>DEBRIEF.</b></p>	

Getting Closer  
The Art of Face to Face  
(Role Play)



**INFORM** the participants that we will be doing a role play. Page 42 in PW

**ASK:** participants to listen to the conversation to pick up what issue is the individual using as their reason not to join and how the organizer responded to this issue.

**ORGANIZING ROLE PLAY SCRIPT**

**Steward:** Hi Tim/Tina, how are you doing?

**Tim/Tina:** Ok.

**Steward:** Have you heard about our meetings with management about the schedule.

**Tim/Tina:** I did. Not sure how it affects me.

**Steward:** What hours do you work?

**Tim/Tina:** B shift – 3-11 pm.

**Steward:** Heard that people aren't fully staffed on B shift, is that true?

**Tim/Tina:** Yeah, it's pretty light sometimes.

**Steward:** Has that been a problem for you?

**Tim/Tina:** Absolutely. Had twice the amount of work and had to stay longer. Seems to be getting worse.

**Steward:** Sorry to hear that. By the way, did you get our update that we sent out last week to the membership on this issue?

**Tim/Tina:** No, I didn't see that. I'm not a member.

**Steward:** Would you like to become one? We need everyone we can to help get the agency to address this issue.

**Tim/Tina:** I would but I'm not sure. Seems like it might piss management off.

**Steward:** It might but sometimes we have to do that to get them to listen. We are protected against them retaliating against us. As more of us get involved, the more leverage we have over them. They can't act like it's only affecting 1 or 2 people.

**Tim/Tina:** That's cool. It would be great to try to fix this, it's been getting worse every month it seems.

**Steward:** Why don't you come to the meeting tomorrow at 2 pm before your shift. I can introduce you to some people working on this. Here's an 1187 to sign up.

**Tim/Tina:** Sounds good. I'll be there




Official Time and the Union Steward











In the Federal Sector, Unions are open shops, meaning that all employees have to be represented, not just dues paying union members.





The trade off for this arrangement under the Statute is that unions receive official time – on duty time – to represent employees.

There a number of attacks on this arrangement from organizations who are against unions. They want to eliminate official time while still requiring unions to represent all employees – effectively bankrupting the union through a lack of time and resources. The key to fighting





	<p>tand surviving his situation is as old as the history of labor – organize, educate, and mobilize employees to increase membership and fight back though legislative, political and social action</p>	
<p align="center"><b>Official Time under the Statute</b> 5 USC Section 7131</p> <p><i>Any employee representing an exclusive representative in the negotiation of a collective bargaining agreement under this chapter shall be authorized official time for such purposes, including attendance at impasse proceedings, during the time the employee otherwise would be in a duty status. The number of employees for whom official time is authorized under this subsection shall not exceed the number of individuals designated as representing the agency for such purposes.</i></p>	<p>It is important as a Steward to know what your official time rights for under the Statute for the following reasons:</p> <ul style="list-style-type: none"> <li>• To follow the law correctly – agencies and anti- union groups are quick to publicize and take action on violations</li> <li>• To educate employees and members on the history and reason for having official time.</li> </ul> <p>Review the slide and note that official time is clearly marked for collective bargaining and that the contract between the agency and the union will determine official time allocation for representational duties.</p>	
<p>Official Time</p> <p>The law requires that the amount of time that may be used be limited to that which the labor organization and employing agency agree is reasonable, necessary, and in the public interest.</p> <p>As pointed out in a Congressional Research Service report, "(a)ny activities performed by an employee relating to the internal business of the labor organization must be performed while in a non-duty status."</p> 	<p><b>Review the slide.</b></p> <p><b>ASK</b> the participants to define reasonable, necessary and in the public interest.</p> <p><b>NOTE</b> any differences in the definitions. Say that collective bargaining agreements, the FLRA and the courts define these terms. And the definitions, like the political environment, can change.</p> <p><b>SAY:</b> we will now look at the broad outline of what can and cannot be done on official time.</p>	
<p>Official Time - Permitted representational activities are limited to:</p> <ul style="list-style-type: none"> <li>• Representing bargaining unit employees</li> <li>• Negotiating collective bargaining agreements</li> <li>• Enforcing law, rules and regulations, and CBAs.</li> <li>• Providing workers with a voice in determining their working conditions</li> </ul> 	<p><b>Review the slide.</b></p>	
<p>Official Time Activities (Permitted)</p> <ul style="list-style-type: none"> <li>• Setting procedures that protect employees from on-the-job hazards, such as those arising from working with dangerous chemicals and machines</li> <li>• Participating in improvement of work processes</li> <li>• Creating fair promotion procedures that require that selections be based on merit, so as to allow employees to advance their careers</li> <li>• Establishing flexible work hours that enhance agencies' service to the public while allowing employees some control over their schedules</li> </ul> 	<p><b>Review the slide.</b></p>	

<p>Activities which <u>may not</u> be conducted on official time include:</p> <ul style="list-style-type: none"> <li>• solicitation of membership</li> <li>• internal union meetings</li> <li>• elections of officers</li> <li>• any partisan political activities</li> </ul>	<p>Review the slide.</p>	
<p><b>Exercise:</b> Official Time Scenarios</p> 	<p><b>SAY:</b> Let's review several scenarios and determine if the Steward can or cannot use their official time. Page 43 in PW.</p>	
 <p><b>OFFICIAL TIME- Scenario 1</b></p> <p>Andrea, a steward for Local 12300, has been asked to investigate a water leak that is affecting three employees on the 3<sup>rd</sup> floor. The supervisor stated that he would address the issue two weeks ago but nothing has happened.</p> <p><i>Can Andrea use official time to investigate this issue?</i></p>	<p>Review the slide.</p> <p>Conduct a Yes/No Poll.</p> <p>Debrief the responses.</p> <p><b>Answer:</b> Andrea <u>can</u> use official time to investigate this problem which relates to the safety of the workplace.</p>	
 <p><b>OFFICIAL TIME- Scenario 2</b></p> <p>Barbara, a steward for Local 32100, wants to set up a meeting with two other stewards to create campaign materials for the Local President reelection.</p> <p><i>Can Barbara use official time to develop campaign materials for the Local President's reelection?</i></p>	<p>Review the slide.</p> <p>Conduct a Yes/No Poll.</p> <p>Debrief the responses.</p> <p><b>Answer:</b> Barbara <u>cannot</u> use official time for internal union business related to an election of the local president.</p>	
 <p><b>OFFICIAL TIME- Scenario 3</b></p> <p>Latisha, a steward for Local 11100, has received a request to attend a meeting with Hector Ramirez and his supervisor. Hector's boss wants to ask him questions about a recent project that received negative comments from headquarters.</p> <p><i>Can Latisha use official time to attend the meeting with Hector?</i></p>	<p>Review the slide.</p> <p>Conduct a Yes/No Poll.</p> <p>Debrief the responses.</p> <p><b>Answer:</b> Latisha <u>can</u> use official time to attend the meeting with Hector and his supervisor under the formal meetings provision of the Statute.</p>	

	<p>ASK the class what type of meeting this is. <b>DEBRIEF</b> responses. <b>SAY/AFFIRM</b> that the meeting is a Weingarten meeting.</p>	
 <p>OFFICIAL TIME- Scenario 4</p> <p>Tony, a steward for Local 22200, received an email from employees on another shift that were interested in learning more about the union. Tony wants to use official time for meeting with the employees after his regular shift has ended.</p> <p>Can Tony use official time to attend the meeting?</p>	<p>Review the slide.</p> <p>Conduct a Yes/No Poll.</p> <p>Debrief the responses.</p> <p>Answer: Tony <u>cannot</u> use official time to organize the employees on another shift.</p>	
	<p>ASK participants how legislative and political mobilization is related to their jobs as federal employees and union stewards. Page 44 in PW.</p> <p>DEBRIEF responses.</p>	
 <p><b>Legislative and Political Action</b></p> <ul style="list-style-type: none"> <li>• AFGE, as a federal union, has rights to protect employees under current laws such as 5 U.S.C. Chapter 71.</li> <li>• Worker rights are controlled by politicians who can protect or eliminate these laws.</li> <li>• Inaction will eliminate our rights.</li> </ul>	<p>As a federal employee your boss and your rights are controlled by laws and politicians. A federal union that is not involved in legislative and political action is as effective as someone going into a gunfight with no weapon, no bullets, and a target on their back. There are many anti-union gunslingers that are looking for you to do just that.</p> <p>To be effective you have to play the game, and the cards are stacked against you in some ways, so it pays to know what works and what doesn't.</p> <p>Politics is a numbers game. If you walk in alone – you will lose.</p>	
<p>Stewards are the front line. <i>Mobilizing employees to fight for their rights!</i></p> 	<p>As Tip O' Neil, a famous speaker of the house said, "All politics is local." The union steward – all politics comes down to your local and your bargaining unit.</p> <p>Who is the Union to a regular employee? The Steward.</p> <p>IF you as the Steward are not involved in legislative and political action – your members will not be involved. It will be a turkey shoot and federal employees will be the turkey.</p>	

 <p>Skills needed for successful legislative and political mobilization</p> <ul style="list-style-type: none"> <li>• Differentiate between legislative and political activities.</li> <li>• Identify ways to get members more involved in the legislative process.</li> <li>• Determine if a situation is a violation of the Hatch Act</li> </ul>	<p>Review skills.</p>	
 <p>Legislative vs Political Activities</p> <ul style="list-style-type: none"> <li>• Legislative = governing <ul style="list-style-type: none"> <li>• Issues → Proposed law</li> <li>• House &amp; Senate bills</li> </ul> </li> <li>• Political = elections <ul style="list-style-type: none"> <li>• Candidates</li> <li>• Political parties</li> <li>• Fundraising</li> </ul> </li> </ul>	<p>REVIEW the slide.</p> <p><b>EMPHASIZE</b> the key thing to note is that issues have more power than the politicians, and federal employees can talk all day about their issues without any problem under federal campaign or election laws.</p> <p>Raising issues in the workplace and agitating for someone to address these issues is the foundation for legislative and political action. Getting people in the community to recognize these issues and to support federal workers is critical to passing legislation and winning elections.</p>	
 <p>Member Involvement</p> <ul style="list-style-type: none"> <li>• What challenges could you face in getting members involved with legislative and political activities?</li> <li>• What are some ways to overcome these challenges?</li> </ul>	<p>REVIEW each question on the slide in sequence and have participants identify obstacles to leg/political action and gather ideas on how they can work around these obstacles.</p> <p><b>INSTRUCTOR NOTE:</b> Avoid getting into detail on Hatch as that will be covered in the upcoming slides.</p>	
<p>Legislative &amp; Political Mobilization and the Hatch Act</p> 	<p><b>SAY:</b> Many federal employees are afraid of becoming involved in politics and legislation due to the Hatch Act. Stewards need to understand the Hatch Act and how this can affect what you can do and cannot do when it comes to campaigns and elections.</p> <p>Emphasize that legislative action and issue mobilization is not covered by the Hatch Act.</p> <p>Page 45 in PW.</p>	



<p style="text-align: center;"><b>Hatch Act Guidelines</b></p> <div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; padding: 5px; width: 45%;"> <p style="text-align: center; color: green;"><b>OK</b></p> <ul style="list-style-type: none"> <li>• Issue and legislative activity</li> <li>• Personal actions away from government facility or identification</li> <li>• Non-partisan political activity (not related to any party)</li> <li>• PAC fundraising</li> </ul> </div> <div style="border: 1px solid black; padding: 5px; width: 45%;"> <p style="text-align: center; color: red;"><b>Not OK</b></p> <ul style="list-style-type: none"> <li>• Candidate and election activity</li> <li>• Government duty time, facility, or identification</li> <li>• Partisan campaigns (party affiliated)</li> <li>• Candidate fundraising</li> </ul> </div> </div>	<p><b>REVIEW</b> the Hatch Act Guidelines</p>	
<p>Hatch Act DO's and DONT's</p> <p><i>Employees May:</i></p> <ol style="list-style-type: none"> <li>1. Register and vote as they choose;</li> <li>2. Assist in voter registration drives;</li> <li>3. Express opinions about all candidates and issues, privately and publicly;</li> <li>4. Run for election to a non-partisan office;</li> </ol> 	<p>Discuss the slide.</p>	
<p>Hatch Act DO's and DONT's</p> <p><i>Employees May:</i></p> <ol style="list-style-type: none"> <li>5. Contribute money to political organizations or attend a political fund raising function;</li> <li>6. Sign petitions, including nominating petitions;</li> <li>7. Wear political badges or buttons (except in government buildings or on uniforms);</li> <li>8. Run for office within party organizations and affiliate groups;</li> <li>9. Attend political conventions, rallies and meetings as an elected representative of a partisan organization;</li> </ol> 	<p>Discuss the slide.</p>	
<p>Hatch Act DO's and DONT's</p> <ol style="list-style-type: none"> <li>10. Take an active part in political management of campaigns;</li> <li>11. Solicit contributions to the political action committee of the organization to which employees belong provided that the contributor is not a subordinate employee;</li> <li>12. Conduct voter registration drives on-site prior to AFGE's endorsement of a candidate.</li> </ol> 	<p>Discuss the slide.</p>	
<p>Hatch Act DO's and DONT's</p> <ul style="list-style-type: none"> <li>• Spouses and other members of an employee's family may engage in all forms of partisan political activities.</li> <li>• Non-federal unions in the private sector are not covered by the Hatch Act.</li> </ul> 	<p>Discuss the slide.</p>	

<p>Hatch Act DO's and DONT's</p> <p><b>Employees May Not:</b></p> <ol style="list-style-type: none"> <li>1. Be candidates for public office in partisan politics;</li> <li>2. Use their official position to influence or coerce colleagues or election results;</li> <li>3. Wear partisan political buttons or stickers while on duty;</li> </ol> 	<p>Discuss the slide.</p>	
<p>Hatch Act DO's and DONT's</p> <p><b>Employees May Not:</b></p> <ol style="list-style-type: none"> <li>4. Collect, solicit, receive, handle, disburse or account for contributions from the general public (NO FUNDRAISING);</li> <li>5. Wear a government uniform or government insignia while engaged in political activities;</li> <li>6. Sell tickets to a political fund raising function to the general public;</li> <li>7. Use government equipment such as email for political activities.</li> </ol> 	<p>Discuss the slide.</p>	
	<p>Page 48 in PW.</p>	
<p>HATCH ACT - Scenario 1</p> <p>You have a conversation with another AFGE member in the lunchroom about how budget cuts are undermining the Agency. You ask the member, who works in a different part of the facility, to speak with other co-workers about opposing H.R. Bill 1001 which will cut the Agency's budget by 10%.</p> <p><b>Question 1:</b> Is this acceptable under the Hatch Act?</p> <p><b>Question 2:</b> Are there any guidelines or restrictions that may affect this action?</p> <p><b>Question 3:</b> What other actions could the member take to help fight against H.R. Bill 1001?</p>	<p>- <b>DEBRIEF ANSWERS</b></p> <p>- <b>Question 1:</b> <u>Is this activity acceptable under the Hatch Act?</u></p> <p>- Yes. Issue education is not covered by the Hatch Act.</p> <p>- <b>Question 2:</b> <u>Are there any guidelines or restrictions that may affect this action?</u></p> <p>- Legislative activity may be restricted during duty time. It would be appropriate to conduct these conversations at lunchtime.</p> <p>- <b>Question 3:</b> <u>What other actions could the member take to help fight against H.R. Bill 1001 and other efforts to reduce the ability of the Agency to conduct its mission?</u></p> <p>Off-site activities are acceptable. Letter writing, phone calls, demonstrations conducted off-duty and off-site would be other options.</p>	
<p>HATCH ACT - Scenario 2</p> <p>You are talking with several people at work about how the agency is getting less effective and a co-worker suggests that the Union send a letter to the congressional representative requesting that the Secretary of the Department reconsider several cuts to agency staffing. Another co-worker recommends inviting the congressional representative to meet with the union at the facility to discuss their concerns.</p> <p><b>Question 1:</b> Is this acceptable under the Hatch Act?</p> <p><b>Question 2:</b> Are there any guidelines or restrictions that may affect this action?</p> <p><b>Question 3:</b> What other actions could the Local take?</p>	<p>- <b>DEBRIEF ANSWERS</b></p> <p>- <b>Question 1:</b> <u>Is this activity acceptable under the Hatch Act?</u></p> <p>- Yes. Issue education is not covered by the Hatch Act.</p> <p>- <b>Question 2:</b> <u>Are there any guidelines or restrictions that may affect this action?</u></p> <p>- Legislative activity may be restricted during duty time. It would be appropriate to conduct these conversations at lunchtime.</p> <p>- <b>Question 3:</b> <u>What other actions could the Local and its members take?</u></p> <p>Off-site activities are acceptable. Letter writing, phone calls, demonstrations conducted off-duty and off-site would be other options.</p>	

<p>HATCH ACT - Scenario 3</p> <p>An AFGE member invites several co-workers in the department out for a happy hour event at a local tavern. One of the Local VPs is also invited. At the happy hour, the conversation gets into politics, which ends in the VP asking the dozen or so employees who are there to "do what you can and volunteer to help elect Sue Mallory!" Sue Mallory is a candidate for the 3rd District Congressional seat. The outburst was then followed by a round of drinks to toast the candidate.</p> <p>Question 1: Is this acceptable under the Hatch Act?  Question 2: Are there any guidelines or restrictions that may affect this action?  Question 3: What other actions could the Local take?</p>	<p>- <b>DEBRIEF ANSWERS</b></p> <p>- <i>Question 1: Is this activity acceptable under the Hatch Act?</i></p> <p>- Yes, this activity is acceptable. You can express your opinion, volunteer, attend a rally, etc. when you are off duty, off site and out of uniform.</p> <p>- <i>Question 2: Are there any guidelines or restrictions that may affect this action?</i></p> <p>- Avoid wearing a uniform or talking with non-employees and giving out their official government card/job title.</p>	
<p>HATCH ACT - Scenario 4</p> <p>The U.S. presidential election is underway and the AFGE Executive Board has endorsed a candidate. Your Local votes to hold a voter registration drive in the cafeteria every month until the election.</p> <p>Question 1: Is this acceptable under the Hatch Act?  Question 2: Are there any guidelines or restrictions that may affect this action?  Question 3: What other actions could the Local take?</p>	<p>- <b>DEBRIEF ANSWERS</b></p> <p>- <i>Question 1: Is this activity acceptable under the Hatch Act?</i></p> <p>- Not acceptable. Cannot register voters at a federal worksite when AFGE has endorsed a candidate.</p> <p>- <i>Question 2: Are there any guidelines or restrictions that may affect this action?</i></p> <p>- See above. Even if AFGE has not endorsed, it is not possible to do voter registration on government time.</p> <p>- <i>Question 3: What other actions could members take to register their co-workers?</i></p> <p>Off-site events are acceptable. Having a non-partisan coalition partner register voters is acceptable.</p>	
<p><b>2 Key Rules to Remember</b></p> <ul style="list-style-type: none"> <li># 1 - You may pursue legislative activity on official time (if provided by your contract) and on site (if not prohibited by your contract), but you may not perform political or electoral work on site or on official time.</li> <li># 2 - You may solicit financial contributions to the AFGE PAC off-site only and you may only ask other AFGE members to give.</li> </ul>	<p>Read Slide</p>	
