

# CSEA Digest for Chapter Site Representative

*Publication 502*

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**MEMBER EDUCATION PROGRAM**



AFL-CIO

California School  
Employees Association

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

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# CSEA Digest for Chapter Site Representative

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# INTRODUCTION

The California School Employees Association (CSEA) stands for equality of our members. CSEA has over 750 local chapters whose members have joined together to form a large and powerful union. Backed by the extensive resources of the association, each chapter negotiates its own collective bargaining agreements, handles its own grievances and problems, and elects its own local officers.

All the power and authority exercised by a democratic union originates with individual members who have chosen to act collectively in relations with their employer. Everything the union does—every position it takes or grievance it resolves—must have the informed consent of the members it represents. In addition to democratically conducted meetings and elections, this means that union leaders must have an effective method of keeping members informed about the activities of the union. It also means that the union must establish effective methods of keeping leaders informed about the opinions and desires of members at every work location in its jurisdiction.

There is a lot of work to do at the CSEA chapter level, and no small group can do it alone. In addition to elected officers, each CSEA chapter selects several members to participate in conducting the day-to-day affairs of the chapter. Some of these members serve on chapter committees with specific responsibilities (negotiations, political action, etc.), while others are given individual authority to handle grievances arising under the collective bargaining agreement.

Realizing that only a small percentage of members regularly attend monthly chapter meetings, many CSEA chapters also appoint an active member at each worksite to act as a “contact person”—a communications link between the members at the individual worksites and the chapter leadership. These members are called “site representative,” and their primary responsibility is to maintain active CSEA participation at their worksite and to keep information flowing. The key to a strong union is CSEA’s site representative program.

Site representatives are not the same as union stewards, they are not expected to handle grievances.

Your chapter’s site representative coordinator, along with this digest and other material provided in a formal training session, will assist you in fulfilling your responsibilities as a CSEA site representative.

# LABOR HISTORY

## The Way We Were, Are, and Will Be!

Voluntary associations of working people are the backbone of the American Revolution. These guilds and associations existed long before the Daughters of the American Revolution or Chambers of Commerce. An organization of working people, (the Bakers), are said to have stopped work to enforce their demands as early as 1741. An “authenticated” strike by New York Tailors was called in 1768 to protest reduced wages. Thus, working people have been unifying efforts to draw attention to their plights and working conditions for over 250 years. Unions are older than the United States. Like the Declaration of Independence and the Bill of Rights, unions are instruments for freedom and expansion of the democratic promise. The American Labor Movement is probably the most effective vehicle, on a continuing basis, for social change. It has been operating effectively for many years. Unions helped to fashion many great milestones in our democratic heritage.

A few of the milestones are listed here:

- ▶ Universal suffrage and the elimination of the ownership of property as a qualification for voting;
- ▶ The establishment of the tax-supported public school system;
- ▶ The elimination of debtor prisons;
- ▶ The establishment of the legal right of working people to organize and bargain with their employers;
- ▶ The establishment of health and safety regulations at work places;
- ▶ The establishment of the eight-hour workday and a minimum wage;
- ▶ Limitations on child labor;
- ▶ The advancement of the concept of social insurance including health and retirement benefits like Social Security and Medicare;
- ▶ The introduction of the concept of industrial democracy at the work site level; and
- ▶ The continuing struggle to raise living standards for American workers.

The collective bargaining agreement is the major instrument used by unions in reaching many of these goals.

California School Employees Association is your union. CSEA is the only union in California whose primary purpose is to:

- ▶ Improve wages, hours, and working conditions for classified school employees;
- ▶ Seek greater security and dignity on the job for classified school employees; and
- ▶ Help create an environment for a more fruitful and meaningful life for classified employees and their families.

## **CSEA History**

CSEA began in 1927 when a group of Oakland school custodians set out to secure retirement benefits. At the time no retirement system existed for classified employees, and workers had very few, if any, benefits and protections.

A group of nine men and one woman assembled for CSEA's first conference. During the three-day meeting, they established a framework for the union and set an agenda of progress that has continued to elevate the status of classified employees for over 90 years. From the Capitol to the bargaining table, CSEA has pursued the interests of classified employees throughout California, transforming non-certificated, "support staff" into classified professionals and respected partners in the education community.

### **1920s**

In 1928, just a year after CSEA formed, the union helped push through SB 551, which allowed school districts to establish retirement benefits for all school employees, not just teachers. More importantly, it became the first law on the books recognizing school employees other than teachers and administrators.

### **1930s**

For classified employees (known at the time simply as "non-certificated" workers), the Great Depression era meant more hours and less pay. Even during this difficult time CSEA secured an important victory when classified employees won the right to paid sick leave.

### **1940s**

In the years following World War II, CSEA established itself as an important part of the education community. CSEA demanded that basic rights and benefits, which had been enjoyed by teachers for years, should finally be extended to classified employees. The legislation passed back in 1928 had allowed that school districts could offer retirement benefits, but in 1948 it became mandatory that school districts provide retirement benefits to classified employees.

In 1959, CSEA helped establish the "Classified Bill of Rights." These new laws in the Education Code included the 40-hour week, sick leave, vacation and bereavement leave and laws prohibiting age discrimination. Classified employees, who had long considered themselves partners in education, were finally getting some of the recognition they deserved.

### **1960s**

CSEA continued to gain legal rights through the 1960s. These laws gave classified employees paid holidays, overtime pay, workers' compensation for on-the-job injury or illness and the protection of not being terminated without just cause. Job security no longer relied upon the whim of a supervisor.

### **1970s**

Despite these gains made at the state level, treatment of classified workers varied greatly from one district to the next. In 1975, collective bargaining gave the union power to negotiate at the bargaining table and to represent employees under the full strength of new labor laws.

## **1980s**

After Proposition 13 passed in 1978, many school programs such as transportation, music, art and athletics began to disappear. Classified employees who worked in those programs lost their jobs or were shuffled around. In 1988, CSEA and the education community supported Prop. 98, which guaranteed a minimum level of state funding for public schools.

## **1990s**

In 1991 the governor and the state legislature tried to balance a state budget deficit by taking money out of CalPERS and thereby jeopardizing public employee pensions. CSEA worked with a coalition of public employee unions to successfully amend the state constitution and protect the pension fund by passing Proposition 162.

CSEA also helped stop a harmful voucher initiative that would have undermined the state's public school system.

## **2000s**

In 2001, to better coordinate collaborative efforts on behalf of working people, at the national and state levels, CSEA joined the American Federation of Labor-Congress of Industrial Organizations (AFL-CIO) and the California Labor Federation. CSEA also joined coalitions working to achieve adequate school funding, affordable health care and retirement security.

In 2003, state revenues did not match projections, and school districts were forced to make mid-year cuts. CSEA fought hard to save jobs and assure that, if cuts were necessary, it was done fairly, without classified employees being disproportionately impacted.

In 2004, CSEA successfully stopped efforts to remove protections against the contracting out of classified jobs. In 2005, CSEA joined with other unions to stop a proposal that would have taken away defined benefit pensions for public employees. When the Great Recession hit in 2008, CSEA again fought hard to minimize the impact on classified employees.

## **2010s**

CSEA worked to recover from the state's sputtering economy and prolonged budget crisis. CSEA helped pass Proposition 30 in 2012 and Proposition 55 in 2016 to restore school funding and protect crucial services for California students.

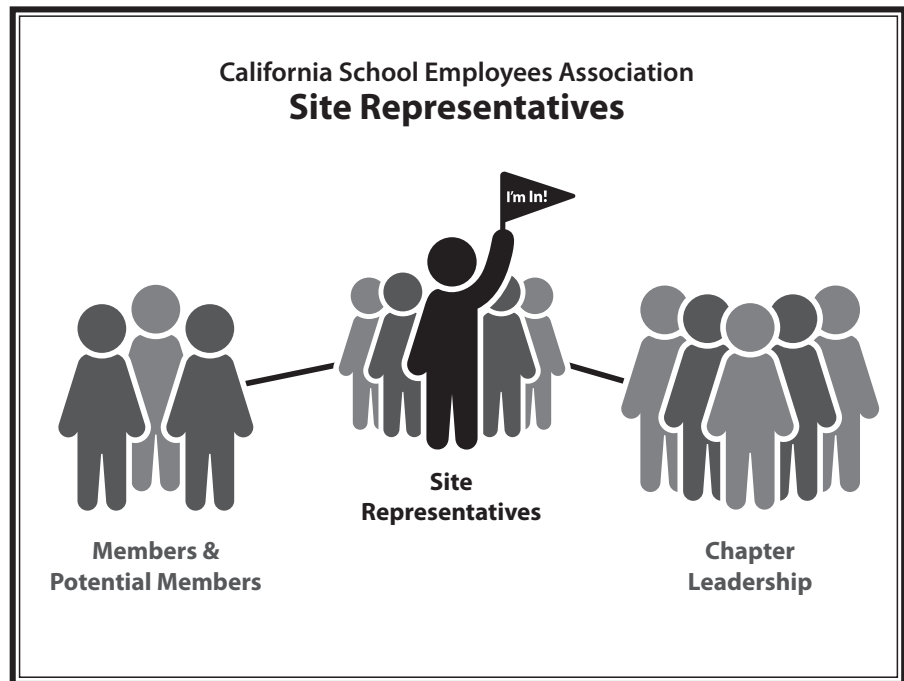
CSEA's success is a testament to its members

Today, CSEA represents more than 240,000 workers, making it the largest classified employee union in the nation. The union's success in legislation, contract negotiations, retirement benefits, safety measures and employee rights is a testament to the hard work of all CSEA members. We must all remain vigilant and involved to keep the many rights and benefits that were won, and to build upon the success of the past to do more for our members in the future.

# WHAT IS A SITE REPRESENTATIVE?

## A Site Representative is...

- The first union contact for new employees.
- A friendly face in a crowd of new faces.
- The primary union contact for current employees at the work site. The site representative must have the ability to convey the importance and value of CSEA membership which determines whether employees become active in the union.
- The CSEA Representative at the work-site.
- The employees' representative to the chapter president, union steward, chapter committees, labor relations representative, and association.
- A two-way communication link between the union and CSEA bargaining unit members.
- The unifying force of CSEA. Graphically, your relationship looks like this:





# SITE REPRESENTATIVE

## JOB DESCRIPTION

The CSEA site representative is the union's vital link in communication with members and non-members. This personal contact is the key to both better working conditions and increased CSEA membership. On site, the site representative is "CSEA"

The CSEA site representative communicates with site representative coordinator, chapter president, union steward and all employees.

### **Duties:**

- Build the membership:
  - Welcome new employees to the worksite.
  - Sign up new members.
  - Attend chapter meetings and introduce new members at chapter meetings.
  - Conduct worksite meetings.
  - Post CSEA information on CSEA bulletin boards.
  - Distribute CSEA materials such as chapter communications, bulletins and member benefit information including Retiree Unit information.
  - Assist those members who are preparing to retire by referring them to the Chapter Pre-retirement Resource Person and giving them a Retiree Unit application and helping them to fill it out.
- Be aware of employees' rights of the work site. When an employee has a problem, know to whom the employee should be referred:
  - Chief union steward/union steward.
  - Chapter president.
  - Labor relations representative.

### **Qualifications:**

- Complete a CSEA site representative training.
- Ability to communicate effectively with members and potential members.
- A commitment to build and strengthen the chapter.

**Time Required:** An average of two to four hours per month.

# SITE REPRESENTATIVE COORDINATOR

## JOB DESCRIPTION

The site representative coordinator is responsible for working with Association, regional, and local members and staff, to organize, implement, and coordinate a system of site representatives who will assist with CSEA's member recruitment and communication.

### **Duties:**

- ▶ To ensure that each site representative is trained and knows who to contact when problems occur (i.e. union steward, executive board, or the labor relations representative, and the Chapter Pre-Retirement Resource Person).
- ▶ To attend chapter meetings.
- ▶ To encourage chapter site representative to attend chapter meetings.
- ▶ To conduct regular meetings with site representatives or otherwise coordinate with chapter site representative activities.
- ▶ To compile and submit to the chapter executive board regular reports regarding site representative activities.
- ▶ To meet and report to the chapter executive board any areas of concern as reported to you by site representatives.
- ▶ To work with Chapter Communications Officer and chapter leadership for distribution of CSEA newsletter, flyers, and other CSEA materials including Retiree Unit material.
- ▶ To encourage site representatives to maintain and update bulletin boards, including CalPERS information.
- ▶ To coordinate the activities of the site representative program and supplying them with retiree material.
- ▶ To consider and encourage an incentive and recognition system to reward active site representatives.

### **Qualifications:**

- ▶ Knowledge of CSEA's organizational structure and site representative program.
- ▶ Ability to work well with others.
- ▶ Successfully complete CSEA Site Representative Coordinator Training.
- ▶ A commitment to build and strengthen the chapter.
- ▶ May have additional qualifications under the Chapter Constitution.

**Time Required:** An average of two to four hours per month.

# SITE REPRESENTATIVE COORDINATOR CHECKLIST

This checklist suggests some ways your chapter might participate in membership activities. When the answer is YES to most of the questions, your chapter will be well on its way to success. This list is by no means final; add to it as you see fit. The more organized activity, the greater your success.

	Yes	No
1. Do the site representatives have a list of the potential members at each site?	_____	_____
2. Has your chapter enlisted the site representatives in membership work?	_____	_____
3. Have all site representatives been briefed on the local organizing situation and have they been given training on how to enroll potential members?	_____	_____
4. Does your chapter have enough literature for a membership campaign?	_____	_____
5. Do the site representatives contact the new employee immediately upon his or her coming to work?	_____	_____
6. Do the site representatives regularly contact the potential members on the job?	_____	_____
7. Are the site representatives equipped with literature and membership application forms?	_____	_____
8. Do the site representatives have regular meetings to discuss and plan membership activity?	_____	_____
9. Has your chapter ever tried housecalls to sign up potential members?	_____	_____
10. Has your chapter arranged member benefits wagons and invited potential members?	_____	_____
11. Has your chapter analyzed your potential member situation and determined where you should concentrate your efforts?	_____	_____

	Yes	No
12. Has your chapter tried to build teams of active members for use in recruiting the potential member?	_____	_____
13. Has your chapter checked to see if any site representative need help?	_____	_____
14. Is membership on the agenda of every executive officer meeting?	_____	_____
15. Have the site representatives received training?	_____	_____
16. Does your site representative coordinator consult with site representatives on their problems?	_____	_____
17. Has your chapter ever tried to get potential members together to talk about issues at the work-place and what the union is doing about those issues?	_____	_____
18. Has your chapter tried getting your union members in departments together at lunch or after hours to see what they can do to help recruit potential members?	_____	_____
19. Does your chapter make the best use of its union bulletin board to inform and mobilize the membership?	_____	_____
20. Does your chapter recognize and publicize the successful efforts of local activities in recruiting new members?	_____	_____

# CHAPTER STRUCTURE

The basic governing body within CSEA is the local chapter. By joining CSEA, an employee becomes a member of local chapter and association, which is made up of hundreds of chapters throughout the State of California.

The chapter is affiliated with and chartered by the Association. The CSEA chapter and the CSEA Association are inseparable—that is, one does not exist without the other. Article II, Section 2 of the CSEA Constitution puts it this way: “Active members of the Association must also be members of an affiliated chapter. All members of chapters must also be members of the Association. Members must be members of the chapter chartered for their bargaining unit.”

The structure of the CSEA chapter (and of the Association) is important because it reflects our democratic traditions. The formal structure of any organization should be determined by its objectives—what it intends to accomplish. In other words, form follows function.

What are the objectives of the local CSEA chapter? The constitution of a chapter usually sets the objectives of the organization, and may read something like this:

**OBJECTIVES:** The objectives of this organization shall be to promote the good and welfare of the members of this organization under the available labor relations system; initiate and promote such legislation as may be for the best interests of the members and public education; afford opportunity for the investigation and interchange of ideas upon subjects pertaining to the progressive development of the public schools; promote the efficiency and raise the standards of service of all public school employees; and establish effective relations with state and local administrative officials based on mutual respect. (*Chapter Constitution Builder*, CSEA)

Specific chapter activities and functions are derived from these general objectives, and may include:

- ▶ Negotiations;
- ▶ Grievance processing;
- ▶ Member assistance regarding personal and work-related problems;
- ▶ Political and community activities; and
- ▶ Recreation and social activities.

All these activities, and others, may fit within the broad objectives of the chapter as described in its constitution.

Given these general objectives and specific functions, the formal structure of the chapter must address members’ needs in a manner consistent with the democratic principles of CSEA.

Most chapters are structured along the lines of the Association. The identity between the chapter and the Association is thus reinforced and the common interests of all CSEA members are enhanced.

## Chapter Meetings

The most important part of CSEA's structure is the productive, well-attended, democratic chapter meeting.

All CSEA power flows from the votes of members at individual chapter meetings throughout the state. Without this active participation, the union cannot deliver on its promise to "Improve the lives of our members, students and community" it serves.

The chapter meeting is the governing body of the local CSEA chapter. Generally, the members in attendance at chapter meetings:

- Elect all chapter officers;
- Authorize the actions of its officers and committees;
- Approve the chapter budget
- Elect delegates and submit resolutions to the Association's Annual Conference; and
- Determine the direction of the chapter by establishing a chapter constitution and standing rules to guide its officers and members in conducting day-to-day CSEA activities.

## Chapter Executive Board

It is not possible to have every decision on every matter submitted in advance for a vote by chapter members. Most chapters give broad authority to an executive board to act on their behalf between monthly chapter meetings. The chapter constitution usually describes the duties of the executive board.

The executive board of this chapter shall be the policy-making body of the chapter in the intervals between chapter meetings. It shall transact necessary business of the chapter and approve the plans of the various committees. (*Chapter Constitution Builder*, CSEA)

The executive board has the general authority to take any action that could be taken by a vote of the membership at a chapter meeting, subject to any limitations set forth in the constitution and the policies of the Association and the local chapter. Chapter members may further control the executive board by issuing formal guidelines through "standing rules" defining the authority of the executive board.

## Chapter Leaders

It is common for CSEA chapters to designate the following officers as members of the executive board: President, Vice President(s), Secretary, Treasurer, Communications Officer, and Past President. In some cases the elected office of Chief Union Steward is also a member of the chapter executive board.

In addition to their duties as members of the executive board, these elected chapter officers have individual duties and responsibilities as set forth in the chapter's constitution and standing rules.

## President

The chapter president has overall responsibility for chapter programs and policies:

- ▶ Ensures the business of the chapter is administered democratically, efficiently and in a manner that ensures fair representation for all bargaining unit members;
- ▶ Is the chairperson of the chapter executive board;
- ▶ Presides at all chapter meetings and acts as chief executive officer of the chapter; and
- ▶ Ensures that all actions of the chapter are consistent with applicable rules of the Association and the chapter.

## Vice President(s)

Depending on various factors, a chapter has one or more vice presidents who assist the president in supervising and carrying out approved chapter programs and policies:

- ▶ May be the chairperson of certain committees;
- ▶ May preside at unit meetings (in chapters comprised of more than one bargaining unit) and coordinate unit activities with other activities of the chapter;
- ▶ Assumes the duties and responsibilities of the presidency, if the office of president is vacant; and
- ▶ May be the chapter site representative coordinator (larger chapters may have a separate office for this task alone).

## Secretary

This officer keeps accurate record of all proceedings of chapter and executive board meetings, a roll of members and officers in attendance at meetings and a roster of chapter officers to be forwarded to the Association:

- ▶ Issues meeting notices which include an agenda for each meeting; and
- ▶ Keep all books and records of the chapter and is responsible for keeping them up to date and in order.

## Treasurer

The chapter treasurer receives and disburses all chapter funds under the direction of the chapter president consistent with the rules of the Association and the chapter:

- ▶ Maintains the financial records of the chapter and reports on the chapter's financial condition at each chapter meeting; and
- ▶ Completes all e-board required financial reports.

## Communications Officer

The chapter communications officer is responsible for:

- Writing articles about chapter affairs for local news media and for the newspaper of the Association;
- Preparing and distributing a newsletter on a periodic basis.

## Past President

The past president is expected to contribute the benefits of his/her experience in CSEA to the chapter and its executive board.

## Chief Union Steward

If so designated by the chapter constitution, this officer can also be designated a member of the executive board.

- Coordinates the activities of all union stewards engaged in grievance processing; and
- Maintains the necessary records on active matters of contract enforcement so the chapter can effectively represent bargaining unit employees.
- Keep the executive board informed on all grievance activity.

## Union Steward

Depending upon the specific provision of the chapter constitution, union stewards may be elected by members at a chapter meeting, or may be appointed.

- Completes CSEA's Union Steward Training Course;
- Investigates and prepares grievances for presentation to management;
- Represents bargaining unit employees in meetings with management officials;
- Acts as the basic channel of communications between unit members and the executive board on representational matters; and
- Relays specific concerns and problems for the negotiating committee to be incorporated into the unit(s) collective bargaining proposals.

## Site Representative Coordinator

The Site Representative Coordinator may be a member of the executive board. Depending on your chapter's constitution, the Site Representative Coordinator can be incorporated into another executive board member's duties and responsibilities, or as a separate position. The Site Representative Coordinator's duties include:

- Implementing, organizing, and coordinating your chapter's site representative network;
- Keeping the executive board informed of all bargaining unit members' issues and concerns;



- Recruiting site representatives; and
- Guiding, training, and directing your chapter's site representatives in the performance of their duties and keep them supplied with membership material including Retiree Unit Information.

## Site Representative

These members act as an active communications link between employees at their worksites, the executive board and chapter committees in non-representational matters.

- Makes the first CSEA contact with new employees at worksites;
- Recruit new employees who did not sign up through new employee orientation;
- Post chapter communications, notices from CSEA and other chapter and unit communications on worksite bulletin boards;
- Refers individual employees to proper chapter officers, committee members or union stewards for resolution of concerns or problems;
- Attend chapter meetings;
- Assess members and potential members through one-on-one conversations as needed;
- Distributes membership information including Retiree Unit membership information; and
- Make report(s) to Site Representative Coordinator.

## Chapter Committees

Except in the smallest chapters, the work of the chapter must be expanded beyond the executive board, union stewards and site representative. Chapters with a broad program of service for the members usually expand their level of activity by establishing committees of active members in various specialized areas.

- Auditing
- Education/Training
- Elections
- Legislative
- Membership
- Negotiations
- Political Action
- Research
- Scholarship

## Variations in Chapter Structure

Not every CSEA chapter fits any model perfectly. The following are some variations that are sometimes necessary:

- ▶ A small chapter of 20 members will probably not have a comprehensive system of chapter committees. All decisions can be made (and most work done) by the chapter members acting as a “committee of the whole.”
- ▶ A large chapter of several hundred (or even several thousand) members may need a more complex structure.
- ▶ Executive board authority may be expanded with formal controls on executive board action through “standing rules.”
- ▶ There may be a system of subcommittees to augment the work of some chapter committees.
- ▶ Some chapters may include several different bargaining units, representing employees of either the same employer or of different employers. The structure may vary to accommodate the legal rights and obligations of employees who belong to separate bargaining units.
- ▶ A Site Representative Program can be tailored to fit the chapter’s needs.

## Unit Meetings

Bargaining units are determined through collective bargaining laws. Chapters that may represent two or more units will have to distinguish between a chapter meeting and a unit meeting on occasions by calling for votes by unit members only. CSEA members in each unit ratify or reject their own bargaining proposals and proposed collective bargaining agreements unless the chapter adopts “merged bargaining and pooled voting” for bargaining units prior to submission of its initial proposal.

Regardless of whether the variations in chapter structure are based on practical considerations or on the requirements of law, the structure should be determined on the basis of “getting things done.”

The chapter will continue to meet its objectives and serve its members only if individuals have access to it, and feel comfortable that any concerns or problems will be addressed in a logical, efficient, and democratic manner.

# HOW TO BE A SITE REPRESENTATIVE

## Build the Union

► *The CSEA objective in all chapters is to “Build the Union.” Members recruiting new members and leaders actively working to educate and inform all unit employees of the benefits and power of a strong union will accomplish this objective. As a site representative you are on the front lines of this objective. Members recruiting members is the hallmark of CSEA organizing.*

### 1. Welcome New Employees

A site representative is the first opportunity the union has to make a good impression at the work site. Site representatives greet new employees at the work site on their first day at work. When you introduce yourself and extend a welcome on behalf of the CSEA chapter and other employees you have made a positive impression and introduced the new employee to the union in a non-threatening manner. A site representative will continue to work at making a new employee feel at home, show them around, introduce them to other employees, share printed CSEA material with them and/or offer to walk through any material they received at new employee orientation. A site representative will give them a copy of the collective bargaining agreement if they do not already have one. In the event the district does not provide printed copies, the site representative will refer new employees to the website where the collective bargaining agreement can be viewed. Depending on your job requirements much of this can be done before work (new employees tend to arrive early), during breaks, or at lunchtime. While most new employees will have had some form of contact with the union through new employee orientations negotiated in most CSEA chapters, a friendly face at their work site makes a huge difference in their overall perception of the union. Ultimately, fifteen to thirty minutes at new employee orientation is not enough time to demonstrate the importance of the union or get new employees involved in their chapter. Site representatives are still the key to a strong and engaged membership.

### 2. Recruiting New Employees

*(See ABC's of Membership Recruitment page 22)*

New employees are more easily recruited to union membership before they settle in. This is why CSEA worked to pass Assembly Bill 119, a bill that mandated union access to new employee orientations in California. If new employees are not approached about membership until long after their first couple weeks, they may believe the District is taking care of them and not realize that the union negotiated the benefits, salary, and other terms and conditions of employment. It is important for new employees to understand that they must fill out a membership application to have access to the full rights and benefits of CSEA membership. It is also critical for all employees to understand that CSEA cannot fight for better hours, wages, and working conditions without

thousands of members like them.

While most new employees should have received an application at their new employee orientation, be sure to keep copies of the newest membership application along with member recruitment packets with you at your worksite. Check the membership status of any new employee you encounter. Give them an application if they did not become a member at their new employee orientation and offer to help them fill it out. Be sure the application is fully filled out and returned to the chapter treasurer and your field office as soon as possible. New member recruiting packets are readily available from chapter leaders, but personal interaction is best provided by a co-worker at the site. As a site representative, you are the union member that a new employee will naturally look to for help, assistance, and information.

Site representatives are a valuable contact for all employees who work at the site. Make an effort to know all the unit employees at your work site. Introduce yourself as the site representative, and let them know how you can be contacted (work site, hours, work phone, email, and cell phone). As a site representative, you will need to know not only who the unit employees are at your site, but union membership status as well. Your chapter leadership can provide this information. Site representatives are ideally situated to provide updates of personal information (address, phone, name change, etc). A contact with each employee to verify this information will serve as an opening for dialogue with your site co-workers. It is important to verify this information at least once each year and at any time you think a change has been made. Site representatives are the first to know of members moving, changing names, etc. Site representatives provide valuable assistance to co-workers when they remind them to provide this new information to the school office and to the District office. A change in one place does not constitute a change in other places.

### **3. Converting a Potential Member**

*(See ABC's of Membership Recruitment page 22)*

The number one reason potential members give for not joining CSEA is “no one asked me to join the union.” The best method for member recruitment is members asking potential members to join. As a site representative, you are in an ideal spot to recruit members.

- Site representatives know the employees and their membership status.
- Site representatives know the benefits of union membership.
- Site representatives know what the local union has done for employees at the work site.
- Site representatives know that the power of the union is with the people (members).

Most people will talk to you about CSEA if you approach them informally and give them information about CSEA. Look for everyday opportunities to talk to someone at your site about what CSEA is doing or has done. When conversations about union activities are commonplace, recruiting members is easy.

The initial questions of potential members...

- I thought I was a member;
  - What does CSEA do for us?
  - Why is membership important to the individual and the group? and
  - How much are membership dues? What do membership dues pay for?
- ...have already been answered in general conversations about CSEA.

A few “refresher” comments and getting a signature on a membership application are all that is left. This final step is what we call “making the ask.” It is critical that after a discussion with a potential member, you ask, “Will you join CSEA?” or a similar question that makes it clear membership is the goal. It can be uncomfortable to be this direct, but it is the best way to keep your chapter and CSEA strong.

Many chapters engage in year-round membership recruitment through site visits. These visits are often focused on new employees who did not sign up at orientation or long time potential members who have never been approached about joining CSEA. Chapter leadership and the labor relations representative will take the initial steps to conduct site visits, but experience tells us that the most successful site visits have been dependent upon trained site representatives at each site. When you are already on speaking terms with the potential members at your work site, and they have already been hearing about the union from you, most of the work of a site visit is already done. Site representatives are often the union member closest to potential members and most trusted by their co-workers. No one can replicate the relationship a site representative has to their co-workers, which is why site representatives are ultimately the best people to convert potential members at their work site.

It is important to know site representatives may also be called upon to help assess members and potential members interest in the union and willingness to take action. These assessments will always occur as part of a one-on-one conversation between you and the member or potential member being assessed. CSEA typically assesses members and potential members on a scale of one to four. If you are asked to conduct assessments as a site representative someone from your chapter or your field office will train you on CSEA’s assessment scale and run through practice one-on-one conversations with you. Assessments, whether being used for potential member recruitment or a contract campaign, help CSEA chapters and field offices identify strengths and weaknesses, prioritize future site visits, and build the union’s power.

#### **4. CSEA Answer/Referral Service**

A site representative is going to be asked a lot of questions by members and potential members. Remember the longer you serve as a site representative, the more you will learn about CSEA and unionism in general. The answers to many questions will come easy. However, no matter how long you serve as a union activist you will have questions presented that you cannot answer. Do not be afraid to say, “I don’t know.” Chapter leaders and CSEA staff are always available to discuss questions with unit employees. Be generous with phone numbers, but do remember to check back and see if the employee received an answer.

## 5. Encouraging Members to Become Union Activists

Once you have invited a co-worker to attend a chapter meeting, recruited a new member, assisted a co-worker, or referred a site problem to a union steward you are on your way to building an effective organization at your worksite. You can also influence other members to become active union members, a union member who does more than pay dues.

Activism occurs when union members talk about the business and actions of the union as readily as they discuss the weather or the local sports team. Activism is attending union meetings, voting on union business, inviting others, using your skills and talents for activities pertaining to the union goals and programs and recruiting others to do the same. Activism is sharing your personal story of the union impact on your personal life.

## 6. Communication

- Talk to employees about CSEA.
- Talk to CSEA leaders about employees concerns.
- Talk to members about CSEA priorities (e.g. pro-working family/pro-public education legislation, candidates, and ballot measures).
- Talk about chapter priorities such as negotiations.
- Remind members about the Retiree Unit.

# THE BIG DIFFERENCE BETWEEN MEMBERS AND POTENTIAL MEMBERS

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## **Members...**

**Are the strength of CSEA because members...**

Elect leaders.

Ratify the collective bargaining agreements.

Represent the union on district committees.

Conduct all the business of the union.

**Are a political force in the community and in the state because members...**

Endorse political candidates.

Are active in grass roots political actions.

Encourage elected officials to support public education and labor.

Take positions on important legislation impacting classified employees.

**Are educated and informed, thanks to...**

CSEA provided workshops and seminars.

Contract provisions for professional growth.

Training for leadership and committee positions.

**Are the UNION. Members are CSEA.**

## **MEMBERS RECEIVE MORE than contract benefits.**

**Some benefits of membership are...**

Legal advice on non-work related issues and financial services.

Representation on other issues outside of a chapter's contract, which can sometimes be discipline, reasonable accommodations, or other workplace issues.

Discounts for merchandise, entertainment, and travel.

Discounts for automobile purchase, rental and service.

Discounts for insurance for self and dependents.

Discounts for insurance for automobile, home, income protection.

Scholarship and career grants for self and dependents.

Representation with CalPERS and Social Security issues after retirement as a Retiree Unit member.

Accidental death and dismemberment policy.

## **Potential Members are...**

Classified employees in your school district who have not joined CSEA.

By law, a potential member will receive the benefits of the contract but will not receive any benefits beyond this. The reasons classified employees continue to be potential members are many and varied, but the most common reasons are...

They think they are already a member.

They have not been asked to join CSEA.

They do not have information about CSEA.

They realize that union membership means union responsibility.

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

## **Members vs Potential Members**

See the difference? Membership strengthens the union and strong membership helps the chapter negotiate better wages, benefits, and working conditions. When they are asked, most potential members say YES to CSEA Membership.



# ABC'S OF MEMBERSHIP

## RECRUITMENT FOR SITE REPRESENTATIVES

### **A. Chart and map your workplace**

Start with a list of all CSEA represented employees at the worksite. The site representative coordinator should obtain a list of bargaining unit members from their treasurer or CSEA field office and provide a list to each site representative at least three times each school year. Thanks to CSEA victories in Sacramento, and at the bargaining table, most chapters should receive monthly information on new employees. Likewise, most chapters should receive quarterly data on their full bargaining unit. The list you receive may include name, job title, worksite, and date of hire. Individuals membership status should also be indicated on the list. Members will either be a “Potential Member,” shown by “PM,” or a “Member.” When this list is provided, take time to verify the information by talking to the employees at your site. Provide any corrections to the site representative coordinator as soon as possible. If the list is not provided, make an effort to talk with all unit employees and record the information suggested above. A copy of this information should be sent to the site representative coordinator or other chapter leaders as soon as possible.

Use the information provided by this lists, or that you collected if you did not receive a list, to chart and map your workplace. An effective worksite chart or map helps keep track of your conversations, who works where and when, how you can reach every employee at your worksite, and even helps identify how shifts, offices, or social groups relate to one another. It is a good idea to include each employee’s specific location at the worksite and shift times on your chart as well, for example, “Guidance Office,” and “7:00 AM - 3:00 PM.” This information can be critical when organizing members to be involved and is not usually collected from the employer. You could capture this in a chart or with a simple map depending on the size of your worksite. To see an example of a worksite chart and map, see Appendix A – Chart and Map Your Workplace. The key is that this information should just be neatly organized and readily available.

### **B. Have one-on-one conversations with each CSEA represented employee.**

Introduce yourself as the site representative. Make an effort to know the bargaining unit employees at your worksite. Be available to chat at breaks, lunches, before and/or after work. Give them a phone number so they can call you. Tell them the most convenient time to call. Check-in with each employee at least once each month, or as needed. Relay bi-monthly information to all CSEA represented employees. If an employee is sick or on leave for whatever reason, this should be reported to the site representative coordinator. Make it

your business to know who is working for the absent employee, and what they are doing (tasks performed, number of hours working, location to which they report). This information could be necessary if the District is utilizing substitutes inappropriately or contracting out classified work.

The best way to get acquainted with all employees represented by CSEA at your site is through one-on-one conversations. Emails, texting, and social media are great, but they are no replacement for the power of one-on-one conversations between workers. When a real person, who you work with, is talking to you about CSEA, you are going to take their message more seriously. The key to a fruitful one-on-one conversation about CSEA is to listen more than you talk. Ask the unit member you are talking to a lot of questions to identify the issues they are passionate about, their hopes, and their fears. Use open-ended questions to learn more about the employee. Keep an open mind, and practice active listening, while avoiding distractions like your phone. You can attend a site representative training for more specifics on how to have a one-on-one conversation and the steps to build a one-on-one script. These one-on-one conversations are also a great opportunity to assess support for CSEA. You can see more about assessments in Appendix B – CSEA’s Assessment Scale.

### **C. Be on the alert for new employees and talk to them about the union.**

You should treat the opportunity to have a one-on-one conversation with a new employee as incredibly important! Keep an eye out for new employees at your site. Be one of the first people to greet the new employee. Show them around. If the employee is new to the district, offer to walk through any CSEA or district material they received at their orientation. Be sure they have a copy of the contract, or know where to find it, and know when and where the union meets. If they are new to your site, verify their union status, the chapter treasurer or CSEA field office can tell you. If they are not a member and they did not recently sign up at a new employee orientation, review CSEA recruitment materials with them. Inform them about recent union victories in your district. Tell them why you joined the union and ask them to help you and CSEA improve the lives of classified workers, students, and our community. Make sure “the ask” ends in a simple, direct question, like, “Can I count on you to stand with your co-workers and join CSEA?” Offer to help them fill out the membership application (many new employees do not know their chapter name or number). Site representative trainings will have more information on how to have this one-on-one conversation. Practice makes perfect! Work on your one-on-one conversation skills with your site representative coordinator, other chapter leaders, or your labor relations representative.

### **D. Approach the potential member**

Many opportunities will come your way. As you report any action that the union is involved in, ask the employee what they think of the situation. When they tell you they believe the union action is necessary or valuable, ask them to help strengthen the union position by joining CSEA. Chapter leadership or your CSEA field office will provide membership recruitment packets for you to use. Distribute any member benefit flyers that are provided

to you to all members and personally give the brochure to potential members. State something like, “If ‘you’d like to take advantage of this member benefit, I can get you an application today. It is an outstanding deal, and many members are using this program.”

## **E. Invite unit employees to attend chapter events and actions.**

At chapter meetings and events, you may have an opportunity to introduce a guest. You should always take the time to introduce members and potential members to chapter leaders and staff that may be present at the meeting. Ask your chapter leadership to provide an opportunity at every meeting for potential members to sign a membership application.

Perhaps even more importantly, get employees at your worksite involved in union actions! Victories in negotiations are not only built at the bargaining table. The strength of the union is dozens or hundreds of members coming together to demand dignity on the job, and the schools workers and students deserve.

## **F. Be patient and be prepared for tough questions.**

Not every one-on-one conversation you have will be positive. Sometimes workers are afraid of what their boss or employer will do if they take a stand with CSEA. Sometimes a worker you talk to might not like CSEA or a specific union member. In some cases, it might take a few conversations or the right moment to move a worker from undecided and uninvolved to engaged with CSEA. Do not let yourself feel defeated! Ultimately, every worker cares about something, and you will be surprised what might move a co-worker to action. Site representative trainings will provide tips on dealing with tough questions and objections to the union.

## **G. Follow and consider relationships.**

It is essential to recognize that relationships and networks already exist in your workplace. Do people carpool? Get lunch together? Are two workers related? Your workplace is already organized in a sense by these connections. You will be more successful in engaging your co-workers if you are aware of these relationships.

When you need to move a co-worker to action or ask them to join CSEA, consider with whom they are already close. If they are close with another union member, who is comfortable talking about CSEA, ask that member to be the messenger. Likewise, there are probably natural leaders among the groups in your workplace already. It is usually more effective to have a one-on-one conversation with a group leader first because if you organize them, they can organize the group which they lead. Identifying natural leaders is simple, ask yourself about a co-worker you think might be a natural leader, “Besides supervisors, who do members ask for guidance from?”

## **H. Do not work alone.**

Organizing your co-workers and getting people engaged with CSEA is easier if you have help! Many hands make light work. If you have a co-worker at your site, who is also excited about CSEA and looking to get more involved, ask for their help. Likewise, reach out to other site representatives, your site representative coordinator, your chapter leaders, and your labor relations representative for assistance whenever you need it. Maybe you have a particularly challenging non-member who does not seem interested in CSEA, even though you have talked to them multiple times. Ask for help and see if hearing from a different person changes their mind. CSEA is stronger when more members are actively involved!

## **I. Follow up. Follow up. Follow up.**

Fred Ross Sr., an organizer with the United Farm Workers, said, “90% of organizing is follow up.” That has not changed since his work with Cesar Chavez, Dolores Huerta, and the farmworkers. If you ask someone to reach out to another worker about CSEA, follow up with them and make sure they did it. If someone tells you, they will join CSEA tomorrow, or they need to think about it, follow up with them. Ask if they have any more questions or offer to help them complete their application.

# CHAPTER COMMUNICATIONS

The site representative will be the primary source of union information for most of the unit employees at a work site. Your job is to keep in touch and keep the information flowing. Be available to the unit employees and be willing to listen. A timid or shy employee may rely exclusively on the site representative to take his concerns and issues forward for review by the chapter leaders. Always remember you represent the employees collectively at your work site. When you are acting as their spokesperson, you are speaking out for the entire group.

## VERBAL communication

You will need to know what the employees think and feel about union issues. You can build relations with individuals by being friendly and open as you discuss the union and the business of the union with them and in their presence. Ask for their ideas and their thoughts on various topics. Did you know \_\_\_\_\_? and What do you think about \_\_\_\_\_? are good questions to put forth. Your questions will generate conversations, and from these conversations will come information that is important to the union. Your job as site representative is to listen for this information, make note of this information and report back to the leadership. You are the ears of the union at your work site.

## WRITTEN communication

A site representative coordinator (or other chapter leader) will be your source of written communication for distribution at your work site. This written information will be sent to you usually by email or interoffice mail and should be distributed immediately upon receipt. Be sure to read the information that you are distributing and ask yourself these questions.

- Can I explain this information if asked?
- Will this flyer help me open up dialogue with a unit employee at this site? Maybe someone who has expressed a particular interest in this type of information or perhaps a unit employee with whom you have not had a personal conversation.
- Do I need more information about this written material? If so whom can I call? Naturally the next step would be to call that person for information or clarification.
- Do I need more copies of this information? If so, let the site representative coordinator know and ask for assistance in solving this problem.

A copy of all written materials should be posted on the CSEA bulletin board unless otherwise directed.

## CSEA bulletin boards

Site bulletin boards for CSEA information are to be maintained by the site representative. A bulletin board kit is available from the site representative coordinator, chapter leader, or your local field office. This kit will help

you maintain an attractive bulletin board. You are encouraged to be creative and design a bulletin board to fit your situation. Remember: false information about the District or District personnel is forbidden and all posted materials are to be approved by chapter leaders.

- Be sure your name and phone number as well as the names and phone numbers of chapter leaders and staff representatives are posted on the bulletin board.
- Post material in a timely manner.
- A bulletin board that is faded, cluttered, and unattractive will not be read.

## **Union time or District time**

The site representative coordinator will be able to provide information about chapter release time to perform union activities available to site representatives in your chapter. Until a site representative knows for certain that release time is available to site representatives, be sure to talk with the site representative coordinator on when and how to conduct union activities. When the chapter does not have a site representative coordinator, site representatives should check in with the designated leader.

## **Chapter meetings**

Chapter meetings are typically held once each month. Take time to attend this meeting and invite a co-worker to attend with you. Ask co-workers if they have any issues or concerns to be brought to the attention of the general membership. As the site representative, you should be prepared to report to the general meeting any activities or circumstances that have occurred at your work site.

Report back to your co-workers the actions and discussions of the general meeting. Distribute or post on the bulletin board any material that was distributed at the general meeting.

## **Grievance information**

A site representative may be contacted by chapter leaders, a union steward or staff for information on a pending grievance that affects your work site. The information you provide will be helpful in reaching a successful resolution. Grievance circumstances may be confidential and all details may not be made known to you. A site representative should provide as much accurate information as is possible.

At a chapter meeting, grievance information will generally be reported by a union steward. This information should be reported back to site employees at site meetings. If there is not a union steward at your site, the site representative may be called upon to report to the site employees the information that was given at a general meeting.

When a site representative reports grievance information at the work site, there are some cautions you must take. The name of the grievant may need to be confidential. The general issue of the grievance can be reported. The proposed resolution can also be reported, but it should be reported as a proposed resolution or the union position. The final resolution may be different and will eventually be reported as the resolution to the grievance. The status of the grievance, level one, two or whatever it may be should also be reported to the site employees. This will help them to see the time frame for a grievance. When employees get this kind of information, they know the union is working for them.

## **Negotiation information**

During the course of negotiations, the leadership, staff, or team will issue negotiations updates for distribution to the unit employees and for posting on the bulletin boards. Be sure each employee in the unit gets a copy of this update, and make sure it is posted on the bulletin board. All employees are impacted by negotiations and the information is important to all of them. In the event no update is forthcoming, call the chapter president or negotiations chair and request information.

## **Work site information meetings**

When needed, work site meetings are an effective method for communicating in small groups. They may be formal or informal (See How to Conduct a Work Site Meeting, Page 29). A note or phone call asking someone to meet in the break room at 1:30 p.m. to discuss union business may be all that is necessary to get a small group together for a work site meeting.

# HOW TO CONDUCT A WORK SITE MEETING

There are various ways to conduct a work site meeting. How you conduct the meeting depends largely upon the situation at your particular work site. When you plan a site meeting, ask yourself the following questions:

- ▶ How many employees are at the worksite? How many do you expect to attend the meeting?
- ▶ Is the meeting place conducive to open discussion of CSEA business?
- ▶ What is the best time for the meeting? Breaks, lunchtime, immediately before the beginning of work, or at the end of the workday?
- ▶ Is it possible for everyone to meet at one time and place?
- ▶ Can the business be conducted within the time constraints of a lunch or break period?
- ▶ Is the time convenient for part time employees?

After considering these questions, you may find it more effective to schedule more than one site meeting. This will give all employees the opportunity to attend.

The following guidelines will help you conduct effective, well attended site meetings:

- ▶ Give three to five days advance notice of the date, time and location of the meeting.
- ▶ When possible, notification should be in writing (notes, flyer, bulletin board posting, etc), followed up by a verbal reminder the day before the meeting.
- ▶ To promote attendance, and when you plan to cover specific issues, list discussion items on the notice.
- ▶ Try to keep meetings short and cover points of greatest interest or concern to the employees. Sometimes this will be difficult — but, in the long run, short meetings with a definite focus will encourage repeat attendance.
- ▶ When an individual brings a personal problem, grievance or concern to site meetings, it is usually best to refer this person to the appropriate CSEA officer, staff member or department. Do not get bogged down at site meetings with circumstances that concern only one individual.



# KNOW YOUR RIGHTS

Even though site representatives are not expected to be experts in all the technical rights of workers, you should have a working knowledge of both your rights and the rights of others under the law. You should discuss these rights with your co-workers, so that the application of these rights becomes a “way of life” for both the employees and the employer.

## Right to union representation

One of the most basic rights of employees in a union is the right to participate in the activities of their union, which includes the right to union representation in most dealings with their employer. The most common example of this is an employee’s right to have a union representative present at any meeting with a management representative involving an investigation which may lead to their discipline.

### These are your rights!

- ▶ You have the right to know the purpose or subject of the meeting.
- ▶ If you think the meeting might lead to discipline, reprimand or dismissal, you have the right to union representation.
- ▶ Immediately notify your union steward or other union representative of your meeting with management.
- ▶ If the purpose of the meeting is investigatory and could lead to discipline and you have requested union representation, the employer must stop the meeting or reschedule it until a representative is present.
- ▶ You must ask for union representation. The employer does not have to advise you of your rights.
- ▶ If you request union representation and it is denied, you have the right to refuse to answer any questions that could be used against you. However, do not refuse to attend the meeting. contact your union steward immediately.

The employer is not obligated to advise you of your rights. **You must demand your right to union representation.**

## Duty of Fair Representation

The Duty of Fair Representation extends to all employees who are members of CSEA or potential members.

The California Educational Employment Relations Act (EERA) states,

“The employee organization recognized or certified as the exclusive representative for the purpose of meeting and negotiating shall fairly represent each and every employee in the appropriate unit.”

When a union does not represent all employees fairly or acts in bad faith with improper intent, motive and purpose, it is in breach of the law, which could lead to charges being filed with the Public Employment Relations Board (PERB).

As a site representative it is important that you communicate all issues from all employees to the site representative coordinator. However, this does not mean that the union has to grieve all issues or take all grievances to the first step and beyond, to arbitration.

As your chapter's communication link you are helping CSEA fulfill its obligation of "The Duty of Fair Representation." If you have questions about the unions obligation to any member or potential member, reach out to your chapter leadership or labor relations representative.

# KNOW YOUR CONTRACT

Technical questions regarding contract interpretations should be referred to a union steward, grievance committee or labor relations representative. Active and well informed members should know the basic rights and benefits provided by the negotiated CSEA contract. A few of the subjects routinely found in a collective agreement are listed below. All unit employees should have a copy of the contract, or know where to obtain one, and as site representative, you may want to have an extra copy with you at the work site. If you need a copy of the contract, the site representative coordinator or chapter president can provide one for you. It will be helpful in answering questions, if you can readily locate the information in the contract. It will be more convenient to direct other employees to a section of the contract. Other employees will appreciate your help and assistance if you offer to review portions of the contract with them. A reminder, all technical questions, concerns of contract interpretation or violation should be referred to a union steward, grievance committee or labor relations representative.

Probationary Period	Article _____	page _____
Holiday Schedule	Article _____	page _____
Vacation	Article _____	page _____
Health and Welfare Benefits	Article _____	page _____
Personal Necessity	Article _____	page _____
Jury Duty	Article _____	page _____
Salary Schedule	Article _____	page _____
Transfer / Promotion	Article _____	page _____
Seniority	Article _____	page _____
Hours and Overtime	Article _____	page _____
Call back time	Article _____	page _____
Differential pay	Article _____	page _____
Sick Leave	Article _____	page _____
Rest Periods	Article _____	page _____
Lunch Breaks	Article _____	page _____
Employee Evaluations	Article _____	page _____
Professional Growth	Article _____	page _____

# KNOW YOUR CSEA

## ASSOCIATION STRUCTURE

### **Annual Conference**

The CSEA Annual Conference is the governing body of the Association. Each chapter is allowed two delegates to this Annual Conference, plus additional delegates according to a formula based on total chapter membership.

All chapter delegates in attendance at the Annual Conference (together with members of the Board of Directors, life members and regional representatives and standing committee chairs) constitute the voting strength at the conference. This delegate assembly conducts Association officer elections, votes for legislative programs, considers changes in the CSEA governance documents, approves the annual budget and reviews the yearly progress of the Association.

### **Area Directors**

Area directors are elected by the chapters within each of ten geographical CSEA “areas.” Along with the four primary “Association Officers” (President, First and Second Vice-Presidents and Secretary) elected by the delegates to the Annual Conference, and the “Past President,” they form the Board of Directors. Much like a chapter’s executive board, the Board of Directors sets policy between Annual Conferences.

### **Association President**

CSEA is organized on the premise that after policy is adopted, it must be uniformly practiced to be successful. The Association President of CSEA is responsible for the administration of the association’s programs. He/she directs the activities of the Executive Director (a paid staff employee appointed by the Board of Directors) who, in turn, is the Association’s full-time manager.

### **Executive Director and Staff**

The Executive Director supervises additional staff employees who are hired to help local chapters get the job done. Among the staff employees are labor relations representatives who are assigned specific geographical service areas to assist the chapters in bargaining, enforcement of statutes protecting members rights, the development of educational programs, recruitment of members, political action and other activities consistent with the objectives of CSEA. Although these labor relations representatives work closely with the local chapter, they are not CSEA members and are precluded from involvement in the internal political affairs of the chapter or the Association.

## Regional Representatives

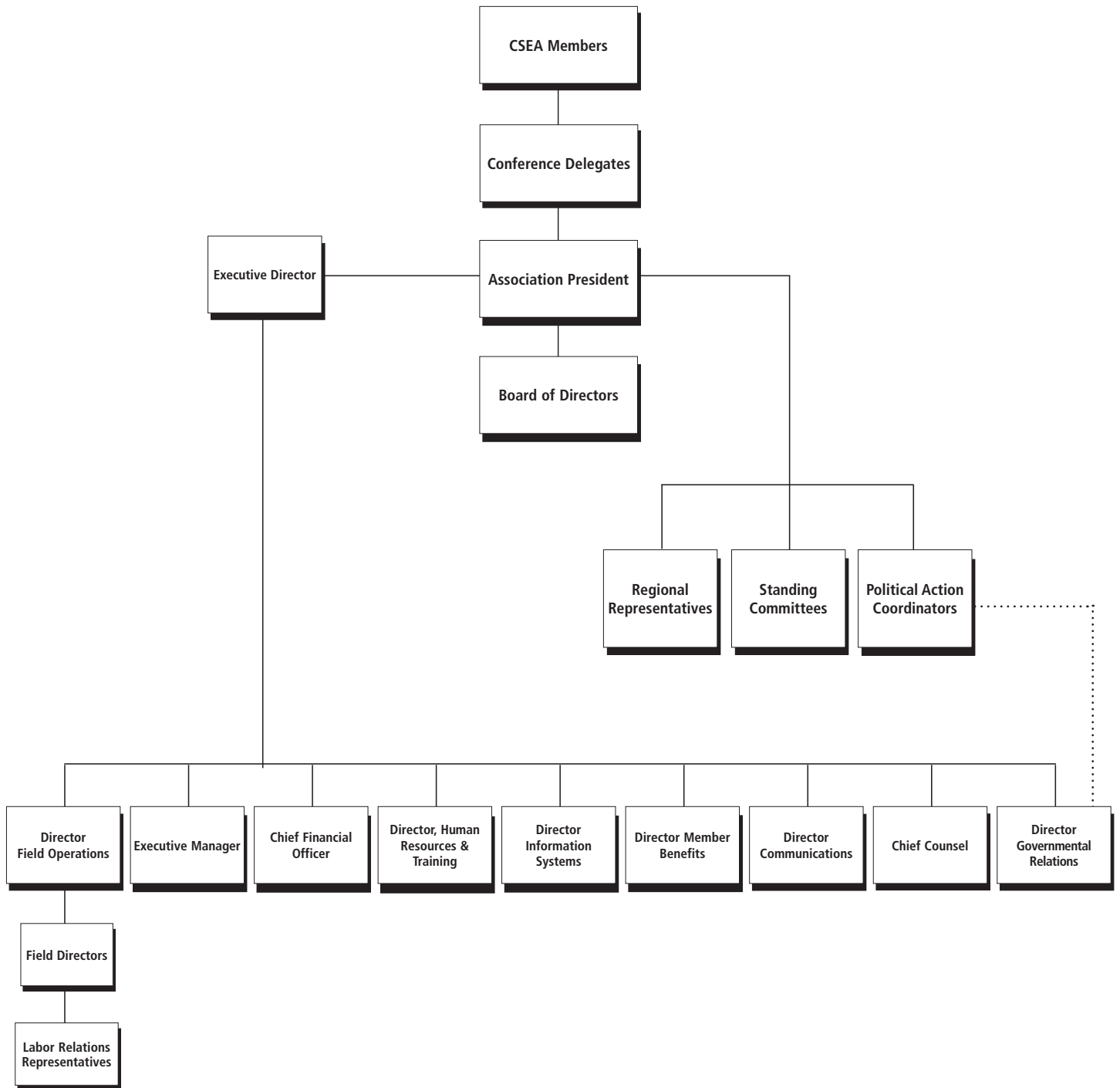
The CSEA Association President also appoints “Regional Representatives” from the membership of the Association. Regional representatives are line officers responsible to the Association President.

The regional representatives assist local chapters by providing a means for the free interchange of information between the several chapters within a region by ensuring that chapter activity is consistent with the standards and policies of the Association.

During the year the regional representatives conduct ten monthly meetings of chapter presidents within their respective regions. These “Regional Presidents Meetings” (RPMs) are held for the purpose of exchanging information, coordinating activity, training and discussing communications received from the Association.

Within the political structure of the Association, the duties of regional representatives parallel the non-political duties of the labor relations representatives. The regional representatives have certain responsibilities and a degree of authority within the political structure of the Association. Unlike the labor relations representative, in certain situations he/she may be required to become involved in the internal affairs of local chapters to protect the interests of the Association and its local chapter members who by definition, are also members of the Association.

# CSEA ORGANIZATIONAL CHART



# REFER QUESTIONS TO THE EXPERTS

Because site representatives are not expected to know everything, there are questions, issues and concerns that should be referred to another person:

- ▶ Work related illness or accidents should be referred to the union steward or labor relations representative. For Worker's Compensation cases, refer the member to our legal referral program for a local law firm recommendation.
- ▶ Members with legal questions or problems not related to their employment should be referred to CSEA's legal referral service at headquarters (800) 632-2128, ext. 1274.
- ▶ Employee discipline matters should be immediately referred to the union steward or the assigned CSEA labor relations representative (See Module 301 — *Duty of Fair Representation*).
- ▶ Technical questions regarding CSEA benefits, insurance plans, or CSEA participating Credit Unions should be referred to the CSEA Member Benefits Department. 866-ITS-CSEA (487-2732).
- ▶ Problems related to proper payment of Association dues should be referred to the chapter treasurer.

In most cases, depending on the issue, you may offer to personally get the answer for the member. This not only enhances the role of the site representative as the person "who can get the answer", but also, avoids shuttling the employee around by providing one-stop-service for most concerns.

On the other hand, complicated questions and complex problems are best handled by putting the employee in direct contact with the person who knows the answers or who can best resolve the problem.

# DEMOCRATIC MEMBERSHIP CONTROL

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The structure of CSEA is based on democratic membership control, which begins with the individual member belonging to a local CSEA chapter affiliated with the Association.

The members of local CSEA chapters collectively determine the direction of CSEA not only in their local chapters, but also at the Association level. Chapter members elect Area Directors to serve on the Board of Directors, the policy-making body governing CSEA between annual conferences. Chapters also send delegates to CSEA's Annual Conference to elect Association officers, and to vote on resolutions which set the course the Board of Directors must follow.

The Association, through the Association President and the Executive Director, appoints CSEA staff members, members of standing committees and Regional Representatives to assist local chapters and their members in conducting the day-to-day affairs of the organization. The local chapter is at the base level of this democratic political structure. It is the grass roots entry point for individual members to join with their fellow employees in a union dedicated to providing for the common welfare of the members it represents.

It is essential for the local chapters to conform to the democratic principles upon which CSEA was founded, so that individual chapters effectively address the needs of their members. (See Module 203, *CSEA Structure—The Association*.)



# RESOURCES

The following resources are available from your field office or headquarters:

- Publication 105     *Chapter Executive Board*
- Publication 153     *Put the Union at the Work Site*
- Publication 203     *CSEA Structure: The Association*
- Publication 302     *Duty of Fair Representation*
- Publication 311     *Know Your Rights*
- Publication 1095     *CSEA Membership Profile*
- Publication 8208     *Member Benefits Mini Guide*
- Brochure 215        *CSEA Wrote the Book*
- Victory Club Applications
- Membership Applications

# APPENDIX A

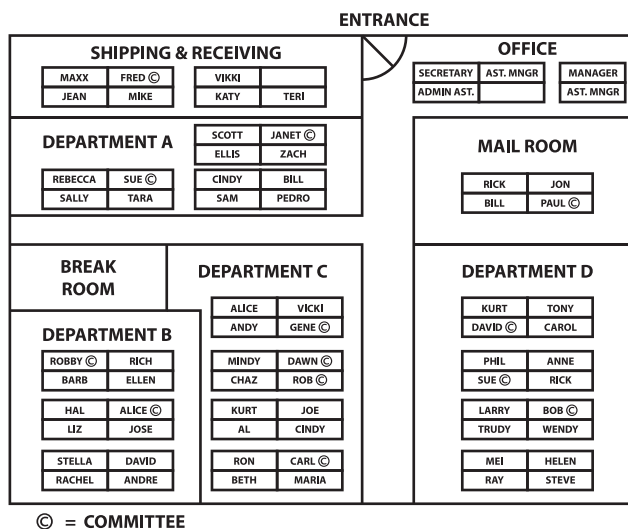
## Chart and map your workplace

Charting and mapping your workplace is one of the most effective ways of keeping track of where and when bargaining unit members work. As you grow more confident, you can also begin to track your conversations and assessments with your chart. You may also use your chart to identify worksite or shift leaders and capture the networks that exist at your worksite.

At its most basic, a useful chart will capture names, contact information, shift time, worksite, and specific work location or work area (e.g., Guidance Office or Room 102). A useful chart might also include information on each action a member has participated in or your assessment of that member using CSEA's 1 to 4 scale. Below is an example chart:

First	Last	Work Area	Job	Shift	Cell	Email	Assessment	State Sup. Vote 04/20	KYR Training 05/10
Jane	Smith	Front Office	Office Technician	7am-3pm	555-123-4567	jsmith@555.com	1	X	X
Jacob	Johnson	Custodial	Custodian	2pm-10pm	555-765-4321	-	-	-	-

On the other hand, a map is just some of the information from the chart represented visually. Have you ever seen those evacuation route maps at your worksite? Imagine something that simple but laid out to identify where each of the CSEA represented workers at your site is located. You might also use color-coded stickers or markers to identify your assessment of each worker on CSEA's 1 to 4 scale. Below is an example map:



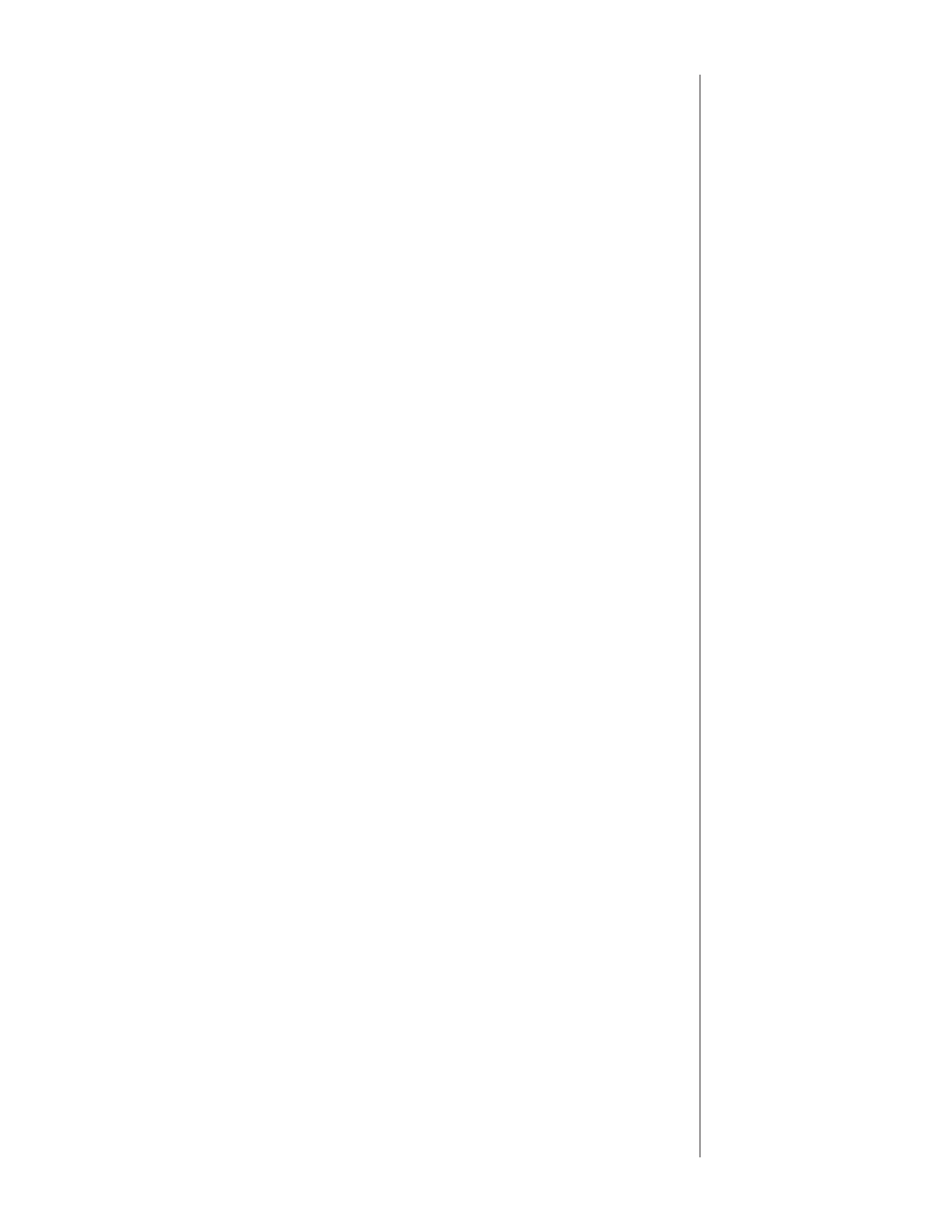
The important part is that both tools be useful to you, your site representative coordinator, and other member activists when its time to put members into action!

# APPENDIX B

## CSEA's assesment scale

Rating	Definition	Description
1	Activist	Actively supports the union by completing tasks they have been asked to do. Volunteers for campaign. Active in committees.
2	Union Supporter	Acts to support the union. Signs a membership card.
3	Undecided	Unsure whether they want to become a member. Needs some specific follow up. Has doubt about the value of the union in the workplace. May participate in anti-union activities because of a lack of knowledge.
4	No/Anti-Union	Unwilling to join the union. May actively support anti-union activities or the employer in any campaign.





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