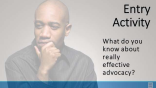


Facilitator Agenda Day 1 – Organizing Through Advocacy

General Materials Needed:		Room Set-up:
1 Set of Handouts per Person Name Tents with the Norms Sign-in Sheet Room signs, sign in signs One ream of white photocopy paper Chart Paper (4 to 5 full w Sticky Strip)	Materials Box for each table with: Markers (Mr. Sketch variety) Post its – 3x3” and 4X5” sizes Index Cards Highlighters – 4 colors Pens and Pencils Participant “toys”	Round Tables Projector, Screen and Speakers Carousel stations and reporting stations around the perimeter 50 people

Key Outcomes for the Event:

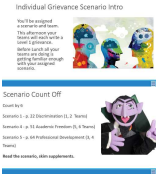
Time	Essential Questions	Resources	Instructions, Activity and Debrief (Facilitators)	Outcomes
	What question(s) should this learning section answer?	Charts, handouts, articles, materials, slide RED is for Facilitator BLUE is for Participant	What are you saying, what are they doing, what questions will you use to guide learning and make clear the important points Include an estimate for how long each section of the learning will take	As a result of this section of learning, what will participants know or be able to do?
7:00 -8:30	Breakfast, Facilitator Prep			
Entry Activity 	Include the following in the end of the day recap email - Day 1 PowerPoint - Day 1 evaluation - Day 2 PowerPoint - Sign up for the Collective Bargaining Resource Page - Homework: Read p.5-8 Three Theories of Change, p.91-94 Why Grievances are Not Enough, and How to Use Grievances to Organize from the Participant’s Handbook What do you know about really good advocacy?			
8:30 -8:50 Ellen 	How will we work together to support learning?	Norms are on Name Tents Name Tags Parking Lot Handout Package	30 Mins TOTAL Getting Started (Ellen) 10 Mins NEA Welcome Native Land Recognition	Participants will know how we are going to work, the basic schedule, and the logistics relevant to the training.

August			the other. Once lined up – help them fold the line – the people at the extreme ends become partners – the next, the next, etc. Once partnered up – ask them to share who they are, where they are from, AND What do you know about really good advocacy? 5 mins to talk with partner 5 Mins to share out	
9:15 –9:45 Seleste Where do you stand? The Litigator The Guide on the Side The Fixer The Strategic Organizer Corner Discussion Three Rounds 1. Where are you most comfortable most of the time? 2. Where does your manager expect you to be most of the time? 3. Where do leaders and members expect you to be most of the time? DISCUSS – Why do you feel this way? What does it all mean? For each corner consider – 1. Who has the power? 2. Who is the story about? 3. How many people are engaged? Key Points Balancing the short-term individual needs with long-term system needs is difficult but necessary.	What are the challenges with advocacy in your work life?	Need Four Charts in the Corners with the Name of the Roles	30 Minutes Total - Where do you stand Seleste The Litigator- mount cases that will result in legal decisions and policy wins for members The Guide on the Side –support and train members who handle advocacy at the worksite and affiliate level The Fixer – work with management to solve problems quickly and effectively The Strategic Organizer – turn individual issues into collective issues for organizing. The four points of a compass we will do three rounds of this – Round 1 – what role do you feel most comfortable in doing – introduce yourself and tell each other why you feel this way. Round 2 – what role does your manager expect you to be doing most of the time - - introduce yourself and tell each other why you feel this way. Round 3 – what role does your affiliate leadership and members expect you to be doing most of the time – introduce yourself and tell each other why you feel this way. In each round, gather at the corner that best fits for you and discuss WHY you selected this. Overall debrief For each of the corners ask – Where is the power if this is your corner? How many members are engaged? Who is the story of the win/loss about? Key Points - Balancing the short-term individual needs with long term system needs is difficult but necessary.	

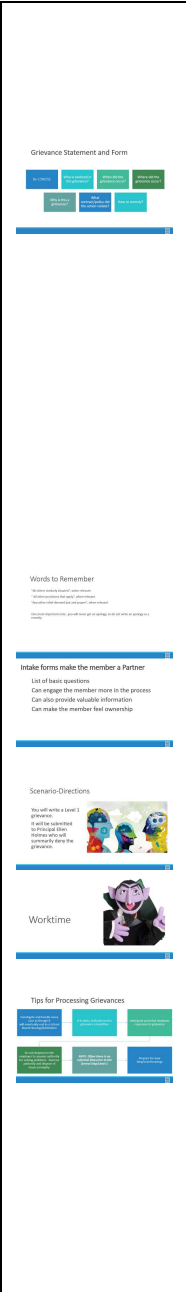
9:45- 10:00 Steven Steven Club or Union? Unorganized Club Union Fighting Union			15 minutes to Explore the Unorganized to Fighting Union Continuum: Clubs are groups of people who follow, rely, and build programs. Programs have a prescribed way of working with a pretty predictable set of outcomes. They are not bad, and we need to understand how they operate. Fighting Unions are groups of people with multiple “natural leaders” engaged through structures, moving people to risk use their resources to achieve the change they want. Outcomes are unpredictable. Page 4 describes this continuum of Unorganized to Fighting Union. You will see elements listed in the left-hand column, with descriptors of what each element might look like as it moves across the continuum towards fighting union. At your tables, take time to explore the continuum and discuss with your colleagues what stands out to you.	
10:00-10:15  BREAK	BREAK			
10:15- 10:45 Steven Discuss the Unorganized to Fighting Union Continuum at Your Table Unorganized Club Union Fighting Union Debrief What did you notice? Assessing Your Local Take a moment to work with a neighbor Step 1: Each person will assess where their local lies on the Club to Union continuum – especially as it related to advocacy Step 2: Each person will look at the Theory of Change and discuss what they see Step 3: Share at your table what your findings are Let's All Talk What did you notice? What surprised you about your assessment? What are you wondering about?		Levels of Organizing Club or Union Handout Pg 4	30 Minutes Total – What does advocacy look like in your locals? 5 minutes: Debrief discussion from before break 15 Minutes for activity- Activity Directions: Everyone – close your eyes and think about one unit you work with – got it in your minds? Great. Step 1 – 5 minutes- Each person will assess where their local lies on the Club to Union continuum – especially as it related to advocacy. Step 2 – 5 minutes- Share at your table what your findings are 15 Minutes – Debrief (Note: Participants were eager to discuss as whole group)	

Key Points Don't grieve in silence When your union fights members need to know When you handle advocacy at an individual level, the real winner is the boss 			What did you notice? What surprised you about your assessment? What are you wondering about? Key points Don't grieve in silence When your union fights members need to know When you handle advocacy at an individual level, the real winner is the boss	
10:45-11:10 Vanessa Problem Solving, Analyzing Policy, and Disciplinary Meetings   Problem Solving Steps – Individual  Problem Solving Steps – Individual (continued)  Pitfalls to Resolving Conflicts  Initial Analysis & Interpretation of Contract/Policy 	What are some foundations you need to have?	Participant Handout pg 9-15	20 Mins – Problem Solving Analyzing Problem Solving Process Remember the 4 corners from earlier this morning, the way each of us approach the work is not always the same. We run into the same issue rooted in problem solving. Recognizing that we approach our work in different ways, we are going to focus on the person who is at the center of the work. Let's look at the steps of problem solving. We are going to look at the 5Ws and an H. We need to figure out who is doing the work. If we have a formal timeline, then we start with the deadline and plan backwards. Finally, we are going to evaluate. After the fact, what happened? Did it work? What information/feedback do we need to improve the process moving forward? In doing this work, be mindful of the pitfalls in resolving the conflicts. (Consider highlighting a couple key options. If time allows, allow the participants to share the options that they recognize as pitfalls.) Revisit one step in the problem-solving analysis • We need to know the whole contract or policy • We need to be aware of the key definitions Dig into the problem-solving cycle. Be mindful of where we can involve more individuals in the work. Why is it a problem?	

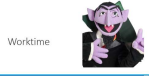
A couple key terms for discipline  Key Points			How could the problem be solved? What is the best solution and how will it be implemented? Who implements what? What happened – feedback? We are going to start to analysis the problem by looking at • Past practice • Contract/ Policy/handbooks • Laws • Or is this someone’s need to vent The next step in the problem-solving model is to brainstorm possible solutions. Please consider if you want to • Address this in a collaborative or adversarial way • Grievance vs. Organizing path. In determining if we are going to grieve or organize around the situation, we need to think about who is at the center of the work. • There is a cost benefit analysis to any solution. When choosing a solution, we need to consider • What the member wants • Needs of the association • The district needs We have been focusing on individual concerns. Disciplinary issues definitely relate to individual issues. In addressing disciplinary issues, let’s look at a few disciplinary related terms. Please know that each state may have varied takes on these terms. If you are in a pro-employee state, there may be labor relations laws that extend beyond the laws of the federal floor. • Garrity rights • 7 tests of just cause (pg 15 in Participant Handouts) Key Points	
--	--	--	--	--

			Navigating through the complexities of problems need a formalized problem-solving process helps to ensure that nothing is overlooked/omitted.	
11:10-11:35 Bekah 	What are the steps typically found in a grievance process?	Participant Handouts pg 9-21	25 Minutes Total– Best Practice Carousel What do we know about advocacy in our work? 12Minutes Working as teams – create a list on chart paper that would teach a person new to this work the key foundations they would need to know to be successful. 8 Minutes Carousel - We are going to visit each of the other teams’ chart. Take a pen and post it notes – You can leave them questions about what is missing, you can leave them check marks for things that are the same as you have, you can leave them light bulbs about ideas you had not thought of. 5 Minute Overview of what makes for good advocacy - Point them to the following two handouts as you debrief with them. Key Points While there are several ways across the states to approach advocacy, being thorough, adhering to a standardized process, and completely documenting advocacy matters are necessary.	
11:35-12:00 Toney 		Participant Handouts pg 22-89 Grievance Forms: 11-12, 43-45	Scenario time (25 min) 10 min: We are going to be working in scenario teams and you will be assigned a scenario team. These teams will be working to write a grievance this afternoon. (Break into scenario groups, making sure to have at least two groups working on each scenario). Count off by 6. Scenario 1: Discrimination p. 22- 36(1, 2 Teams) Scenario 4: Academic Freedom p. 51- 63 (3, 4 Teams) Scenario 5: Required Professional Development p. 64-89 (5, 6 Teams)	

Read Well Enough to Answer the Following 1. Is there a grievance procedure? 2. Are there timelines to consider? 3. Who can be a grievant? 4. Is there a form for your procedure? Worktime 			Read the scenario and skim the supporting documents. While you are skimming, keep in mind these four questions. 15 mins – Reviewing the Case-4 questions - 1. Is there a grievance procedure? 2. Are there timelines to consider? 3. Who can be a grievant? 4. Is there a form for your procedure? Also, look to pages 11-12 for a grievance form that you can use for this exercise. Know that, depending on the state, there may or may not be a standard form. If there is no standard form, you can use anything that includes the necessary elements. Worktime: You will not be writing the grievance yet. Use this time to review the scenario and think through the 4 questions. PLANNING: CREATE ADDITIONAL RESOURCE INFORMATION TO SCENARIOS 2 AND 3. REVISE PARTICIPANT HANDBOOK PAGE 43 TO STATE “STEP 1, STEP 2, AND STEP 3” INSTEAD OF “STEP 3, STEP 3, STEP 4”	
12:00 - 1:00 	LUNCH			
1:00 – 2:00 Charles	How do I prep and write a grievance?	Three Scenarios	Grievance Scenarios, cont. 5 Minutes – Introduction - Review the grievance form. When completing the form, the purpose is to be thorough and concise. Much of the information is demographic information about the member. Introduce concepts of writing the grievance. There may be a form that exists, often in a CBA, but non-	.

			bargaining states can create their own if a formal form has not been created. Pages 11-13 and 43-45 are two examples. The grievance process has 3-4 steps. Level 1 can be a formal concern to the member's immediate supervisor. The key concepts that need to be included: The overall written grievance should be written in a concise manner (this is not like a dissertation or essay) • When completing the grievance form you need to be able to answer the following questions. • Who is involved in the grievance? • When did the grievance occur? • Where did the grievance occur? • Why is this a grievance? • What contract/policy did the action violate? How do you remedy the situation? When identifying the violations, it is key to remember to use all of the relevant Board policies and contract language. The statement needs to clearly articulate how the board policy or CBA have been violated. • Relief sought: how to make the member whole – you will not get any apology public or private Words of wisdom: these phrases should be considered for inclusion in your grievance. And note, that an apology will never happen, so it should not be included as a remedy. Worktime: 10 minutes to draft your grievance and submit your grievance to Principal Ellen by email to eholmes@nea.org. FOR NEXT TIME: THERE NEEDS TO BE 30 MINUTES FOR THE WRITING OF THE GRIEVANCE. 10 minutes- Tips for processing grievances- Good tips to consider as you prep your case.	
--	--	--	---	--

			• General concept- it is important to know that when you are prepping your grievance, you should prep as though it will go all the way through the grievance procedure, be that at arbitration or the school board • If you, as the UD, are the ones driving the grievance, you should be communicating with the local grievance committee, if it exists. Usually, if this exists, the committee will look at the violation and evaluate whether there are grounds for a grievance and will coordinate the advocacy. • You should anticipate what the employer's response will be because you can use this to prep your argument, your presentation. • Even in locals where there is a collaborative relationship, you should not enter the process assuming that you will be able to reach an agreement. • In some CBAs, the first step may be an informal conversation; this may need to happen prior to the submission of the written grievance. • Be mindful of timelines. Rarely are timelines written by the local, in the local's favor. There are real, legal consequences to missing timelines. If a timeline is missed by the local, they may be forfeiting the grievance. Also note that some violations may be ongoing, so the timeline is constantly restarting. (I.e., ongoing pay errors). Don't grieve in silence. If we don't file grievances for contract violations, we devalue our language, and can make it unenforceable. Grievances can be an opportunity to organize around an issue, especially when an issue impacts multiple people. When your union fights, members need to know. What other things can you do while the grievance process plays out? Who does it benefit for you to be silent? Now we are going to transition to preparing for hearings. You just finished the grievance form; that should function as an outline for your grievance presentation. You should also arrive early and do what you can to be as prepared as possible. In the crafting of your argument, you should work in a	
---	--	--	--	--

			chronological order; this helps the employer understand the concerns and helps the member stay focused. Once you have established what happen, in chronological order, you should then be clear about WHY this is a violation. Finally, you need to be clear about your remedy; what relief are you seeking? We include “make whole” language to ensure that we leave the door open for any remedy that comes up during the process. Remember, thinking creatively can be of immense value here. 30 min work time to prep case for presenting. (1:30-2:00) Finalize preparing what you will present after break.	
2:00 -2:15 	BREAK			
2:15 -3:30 August    	What are the differences in issues?		Group presentation Time - 75 minutes 5 minutes –introduction 10 minutes – to get located 40 Minutes Presentation - Each team gets 20 minutes to present to the other side and hear the outcome. (a total of 40 minutes) 20 minutes Debrief and Key Points: Popcorn around the room to get feedback on these three questions: What did you take away from listening to your partner group's presentation? What was challenging as a presenter? If you were doing this for real, how many workers would be involved on the union side? Key points- Know your grievance procedure. Use your grievance procedure. Know how to analyze your CBA/policy. Connect as many workers as possible to the work of the union, including grievance work.	

			How many people were involved from the union if the scenario was implemented as we just did?*	
3:30-4:15 Charles Preparing for Step 3- School Board Hearings Writing an Opening Statement Opening Statement A Good Opening Statement A Good Opening Statement, cont. Write your Opening Statement Pair Share: Opening Statement Debrief: Opening Statements Key Points		School Board Hearing Handbook	45 Minutes Total – Prepping for a School Board Hearing; Opening Statements 10 min School Board Hearing Format (Charles) There are 11 standard format steps to formal hearings. Reference Common Format that is an additional handout – see Roman numerals 1-11. Ask the participants to read the steps silently. Facilitator will read the steps aloud and elaborate on the steps over the next few slides. Opening Statements An opening statement provides the hearing examiner or arbitrator a roadmap of the case. The components of the opening statement include: • Description of the district and bargaining unit • Background of the employee's work history • The action that lead to the grievance • Provides intended entitlements • What the union intends to prove • Summarizes the case • The remedy sought 15 min- Participants draft opening statement on own 10 min- pair share; coach on if hit the key points 10 mins- to debrief and key points: The opening statement provides a roadmap to your case. NOTE FOR NEXT YEAR: ADD SCHOOL BOARD HEARING COMMON FORMAT AND HEARING HANDBOOK TO THE PARTICIPANT HANDOUTS	
4:15-4:30	How are we doing so far?		15 Minutes - Ending it Right (Ellen) Questions, Connections, Reflections Housekeeping announcements Plus/Delta at the Door FOR TOMORROW –	Participants will be able to bring a little closure to their learning and provide feedback on the day.

4:30 – 5:00	What is the expertise among my colleagues?		Choice Networking Activities	Participants will make useful connections with staff from other affiliates.
5:00	ADJOURN			