

CWA
STRONG
UNION
STRONG

CWA
ACTIVIST

60TH ANNIVERSARY OF THE MARCH ON
WASHINGTON

Local Officer TRAINING

INSTRUCTOR'S MANUAL

Local Officer Training

Instructor's Manual



Table of Contents

Facilitation Best Practices	1
Tips for Online Trainings and Webinars	3
Materials Checklist	5
Training Agenda	6
Welcome and Introductions	9
Primary Roles of Local Officers	11
CWA Strong	13
CWA Organization	15
CWA Constitution	16
The Role of Local Bylaws	20
Financial Responsibilities of Local Officers	23
Setting Local Goals and Budget	36
Parliamentary Procedure	38
Local Union Committees	41

Organizing	43
Internal Organizing	43
Workplace Stewards	45
Presidents, EVPs, Secretaries and Treasurers	45
Enforcing Union Security Agreements and Agency Fee Objections	49
Retiree Activism	50
Preventing Decertification	51
Members' Relief Fund	52
Sexual Harassment	53
The UOPM	56
District/Sector/Division Structure	56
Understanding Arbitration	57
Collective Bargaining	57
Legislative/Political Program	57

The CWA Education Department developed this instructor's manual to accompany the materials in the Local Officer Resource Manual. Before presenting this material, you should read through the entire manual and familiarize yourself with the flow of the training, the exercises, and any advance preparation necessary (materials, invitations to other speakers and trainers, etc.). You should not read to the participants from this manual – it is not intended as a script but rather a guide. You should be prepared to add materials and examples from your district, sector, division, area and/or industry.

In particular, obtain a list of local officers contributing to the CWA Political Action Fund who will attend the training. Make sure to sign up any individuals who do not already contribute.

Facilitation Best Practices

Your role as a facilitator is absolutely critical to the success of our mobilization efforts. You are the person responsible for educating our members and preparing them to fight. So here are some guidelines and expectations:

Be prepared.

We expect you will thoroughly prepare for each presentation.

- Know the material so you are comfortable with it.
- Give careful consideration to the logistics, so you have all the materials and supplies you need.

Be participant-centered.

You could deliver a presentation brilliantly, but if you didn't connect with the participants' lives, it would be unlikely to move them to action. As you lead the training, observe the experiences of the participants. Adjust as needed to make this a meaningful experience for participants.

Manage your time.

Each session is designed with a clear timeline as demonstrated in the sample agenda included in this guide. Starting and ending on time conveys respect and strong organization skills. Here are a couple of tips that will help you manage the time:

- Before you start **consult with the host facility** about flexibility in timing.

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

- **Use the timed agenda included in this guide.** Given the tightness of the agenda this will be an invaluable resource.
- **Keep an internal agenda** that details how much time you will use for each module and activity.
- Feel comfortable letting the group know you need **to move them forward in the interest of time.**
- **Use time cards!** Use 1 Minute, 5 Minutes and 10 Minutes time cards that an assigned person can flash when time is running out.

Using PowerPoint Effectively.

When using technology, a rule of thumb is to assume that whatever can go wrong will go wrong. With that in mind:

- Save a copy of the presentation in your email and on a thumb drive as back-ups.
- Don't read from the slides. Use the summary points on the slides and make them your own.
- Practice!

End Strong.

Experienced speakers usually plan their openings and closings, because they are so important. Your session should not just fizzle out and drift off or end with a barrage of announcements. You want a good energetic summary and action-oriented send-off. Thank people for their time and for sharing their experiences. Highlighting a couple of things participants said that express the purpose of the training is a great way to summarize and focus on the objective of the session.

Trainer Debriefing.

After each training session spend some time debriefing how it went. Flag pieces, statements or stories that worked well and should be replicated for the next training and which pieces should be adjusted. Take notes, both on what went well and what you want to change for the next time.

Most Importantly... Have Fun!

Having fun and using humor is an excellent way to engage with training participants and keeps them interactive and comfortable. Don't be afraid to laugh or sprinkle a joke within the training to keep the momentum going and upbeat.

Tips for Online Trainings & Webinars

The Basics of Using Zoom Conferencing Effectively

What Can Zoom Be Used For?

Phone and Video

- One-on-One meetings
- Team or Large group meetings
- Training Webinars
- Collaboration and Screen Sharing

Steps for a Successful and Effective Zoom Conference Call

Step 1. Before the Call

Sending invitations

Email

Google Calendar Invitation

Send the agenda

Purpose of the Call

Assignments and Roles

Expectations and Goals

Send relevant documents, handouts and links

Step 2. During the Call – Structure

Roll Call

Go over the agenda, goals, call structure, and features to use during call

Call Structure Options

Speaker(s) → Participants

Participants → Speaker(s) → Participants

Next Steps

Step 2. During the Call – Facilitation Techniques

- Ask individuals to mute their lines (individuals who dial in by phone can use *6 to unmute themselves)
- Guide the Call – stick to the agenda, time limits, and discussion and feedback structure
- Call out when participants can't be heard clearly or there is background noise
- Use "round robin" to collect feedback
- Silently count for 3 seconds before switching topics

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

- Provide time checks so everyone knows when to move on or when the call is ending
- Provide a meeting recap at the end of the call
- Confirm that everyone understands next steps, responsibilities, and deadlines
- Silently count 5 seconds before closing the call

Step 3. After the Call

After completing the call, promptly send:

- Outstanding documents
- Call notes
- Next steps agreed to on the call
- Confirmation of the next meeting date and time

Zoom Meetings & Webinars

Use the links below for video tutorials:

[Join a Meeting](#)

[Scheduling a Meeting with Zoom Website](#)

[Meeting Controls](#)

[Scheduling a Meeting with Google Calendar](#)

[Recording a Zoom Meeting](#)

[Sharing Your Screen](#)

[Using a Poll](#)

[Using Breakout Rooms](#)

[Using Non-Verbal Feedback](#) (Hand raising, Thumbs Up, etc.)

Phone and Video Conference Calls Best Practices and Ideas

- **Set up your office for regular zoom use.** Consider setting up an office space with a well-placed TV, camera, wired internet and phone connection that can be used with regularity and ease.
- **Choose a quiet location.**

Materials Checklist

Important advance planning is necessary for a successful training. Training via zoom requires fewer materials in the moment, but careful preparation is necessary to make sure participants have everything they need for the training in advance.

Instructor Materials

You will need the following materials:

- ☐ Local Officer Resource Manual
- ☐ Local Officer Training Instructor's Manual
- ☐ CWA Constitution (*make sure you have the latest version*)
- ☐ List of local officers contributing to the Political Action Fund (*you must request this in advance from the political department*)
- ☐ Local Officer Training Videos
- ☐ Local Officer Training PowerPoint

Participant Materials

- ☐ Local Officer Resource Manual
- ☐ CWA Constitution
- ☐ District/Sector/Division Structure Chart (*Instructor must provide*)
- ☐ CWA Political Action Fund Cards (*Instructor must provide*)

Training Agenda

There are many different options for conducting Local Officer Training. We have designed the curriculum in as flexible a way as possible to account for the diversity of ways that people will deliver this curriculum, whether in person or virtually.

To this end, we have not included a typical agenda, but instead, a table that shows each training module along with the amount of time allotted. This way, each trainer can figure out a way to deliver the curriculum in a way that works best for you and the context in which you are training.

Ideas might include delivering the training as usual (2.5 days over Zoom), dividing the curriculum into 4 hour sections and delivering it over several different days, etc. Get creative! The most important thing is that local officers are supported and given information about all the different aspects of their role as they take on new leadership.



TRAINING MODULE	TIME ALLOTTED
Welcome & Introductions	15 min
Primary Roles of Local Officers	45 min
CWA Strong	30 min
CWA Organization	30 min
CWA Constitution	45 min
The Role of Local Bylaws	30 min
Financial Responsibilities of Local Officers	90 min
Setting Local Goals and Budget	45 min
Parliamentary Procedure	60 min
Local Union Committees	60 min
Organizing	20 min
Internal Organizing	105 min

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

Workplace Stewards	45 min
Presidents, EVPs, Secretaries and Treasurers	120 min
Enforcing Union Security Agreements and Agency Fee Objections	20 min
Retiree Activism	10 min
Preventing Decertification	30 min
Members’ Relief Fund	15 min
Sexual Harassment	45 min
Union Operating Procedure Manual	15 min
District/Sector/Division Structure	30 min
Understanding Arbitration	60 min
Collective Bargaining	45 min
Legislative Political Program	45 min

Welcome & Introductions (15 min)

Begin screen sharing before you begin the presentation with this slide up so participants can follow along with the PowerPoint presentation throughout the training.

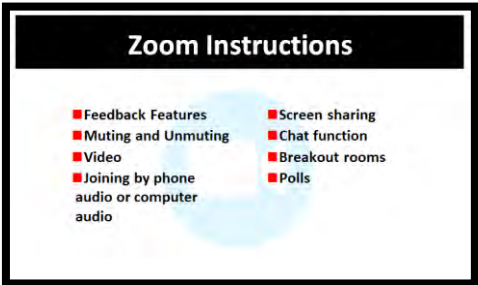


Slide 2. Introductions and Overview.

Welcome the participants. Explain the important role Local officers play in CWA. Share a personal story if applicable to introduce and credential yourself. Explain to participants that you would like to begin the training by allowing them to interview and then

introduce another member of the class to the whole group.

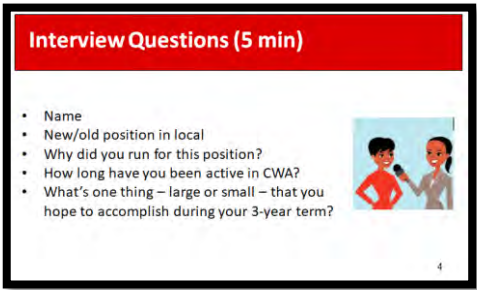
This is an important opportunity for you all as local officers and leaders in CWA to get to know one another. This training is not just about what you learn in the class but about the relationships you form and the other leaders you can turn to celebrate accomplishments or for advice when hard things come up.



Slide 3. So we are reviewing a lot of important information today. I want to start by reviewing some Zoom basics that will make our time together run as smoothly as possible even though we can’t be together in person.

1. **Feedback features** – We will practice with these in a moment, but the different feedback features create ways that you – as participants – can engage with each other and the trainer – without unmuting yourselves.
2. **Muting & Unmuting** – While I am talking (facilitator) I am going to ask that everyone stay on mute. We know it can be very challenging to minimize distractions and outside noises at home, so unless you are speaking, we ask that you stay on mute to minimize distraction for the other participants. Can everyone find their mute/unmute button? Let’s practice real quick muting and unmuting ourselves.
3. There are different ways to join the **audio** – either by phone or computer audio. If you are having issues with your Internet connection, we recommend dialing in by phone.

- 4. If you’re able to have your video open, we’d love to see your face. But there should be a button in the bottom left corner of your screen where you can control whether or not your video is on.
- 5. I will be sharing my screen for most of the presentation so that you can see the PowerPoint slides, but might turn it off during discussions so that we can better see each other’s faces. You all shouldn’t need to worry much about that function.
- 6. And lastly, the chat function. Do people see where it says “chat” down below if you drag your mouse toward the bottom of your screen? This is another feature we will practice using during introductions.



Slide 4. Instructions.

Let participants know that in a moment you will divide them up into pairs and send each pair to a separate breakout room.

Ask each participant to interview their partner and find out the answers to each of the follow questions. Explain that each participant will

introduce their partner to the rest of the group after the interview.

Encourage participants to take a screen shot of the slide or write down interview questions since they will not be able to see the interview questions in their breakout room.

Give participants **5 minutes** in their breakout rooms.

Bring participants back and ask everyone to briefly introduce their partner according to the questions on the slide.



Slide 5. Here are the main topics that we are going to cover during training. Everyone should have also gotten a copy of the Local Officer Resource Manual. We will use the book in training for exercises and information but this is also a resource manual that you can use for years to come.

This is also not just a resource for you! Please feel

free to use copies of specific pages of the manual – print them out and share them with other officers, stewards, and rank-and-file members to help them better understand CWA and increase their participation.

One of the most important goals of this training is that each of you use what you learn here when you return to your Local to educate, guide and lead others in the Local.

Please ask questions and participate. There is no such thing as a stupid question. Our goal for the training today is that we maximize group discussion and minimize the time that the trainer is talking.

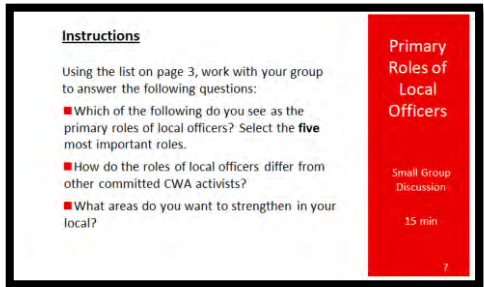
Let’s get started.

Primarily Roles of Local Officers (45 min)



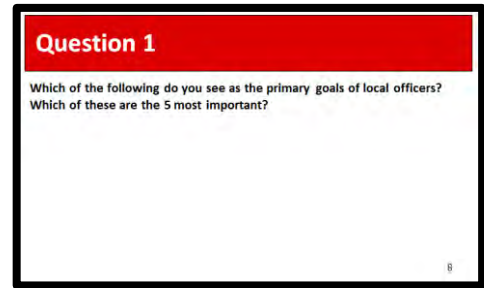
Slide 6. We’re going to start today by talking about some of the critical roles that Local Officers play. And we’re going to start this conversation with an exercise.

Everyone please open your Resource Manuals to page 3.



Slide 7. So everyone should have your Manuals open to page 3 for the next exercise we’re going to do. In a moment I’m going to break you up into groups to answer the questions on the screen.

Talk through each question briefly first before sending participants to breakout rooms (3-5 participants per room).

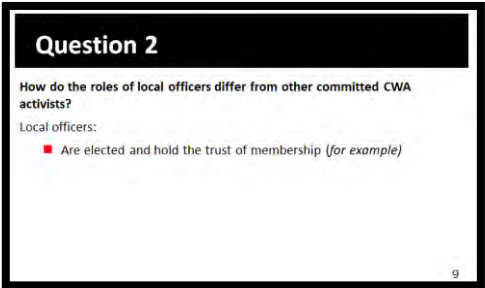


Slide 8. Debrief. Take the PowerPoint out of presentation mode and use the blank slide as flip chart paper to record participant’s answers as you debrief. Ask each group to read the top five roles that they selected from the list. Disagreement is good because

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

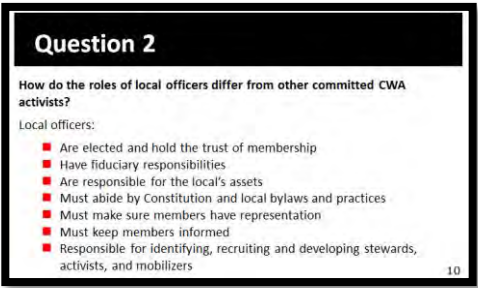
it leads to discussion. Ask follow up questions as participant’s share like, “Why did you select those five?” Then ask the rest of the group, “Do you all agree with those five? No? Let’s hear why.”

As much as possible try to get all of the participants involved in the discussion. If **internal organizing** is not on anyone’s top 5 list, ask why. The answer “They are all important” does not work for this exercise.



Slide 9. How do the roles of the local officers differ from other committed activists?

Take the PowerPoint out of presentation mode and use the blank slide as flip chart paper to record participant’s answers as you debrief.

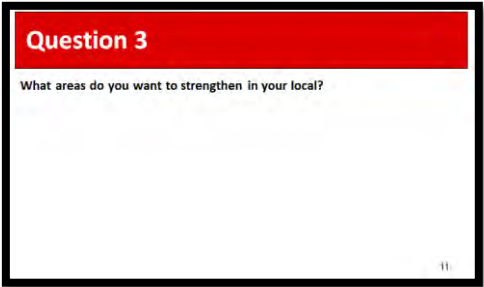


Slide 10. Once you have heard from participants in each group, click through each of the following responses – particularly those that were not covered on the previous slide.

Key Takeaway: While local officers are responsible for each of these things, some of the things on this list can be done by members too. Which

responsibilities on this list should not be only for local officers? (making sure members have representation, keeping members informed, identifying/recruiting/developing stewards, activists & mobilizers).

Part of the responsibilities of the job is to not just take on these responsibilities but to build teams of people around you who are taking these things on as well.



Slide 11. Debrief.

Take the PowerPoint out of presentation mode and use the blank slide as flip chart paper to record participant’s answers as you debrief.

During the discussion, encourage participants to

move from how the local has been sending time and resources to how they would like to see it do so in the future.

Try to ask probing follow up questions to participants to get them to talk about what concrete steps they would need to take to make the local stronger. *Answers might include steward recruitment, building an internal organizing program, getting more active in politics, communicating with members more regularly.*

Key Takeaway: All locals have strengths and weaknesses. As new officers, it’s important to identify what your weaknesses are so that you can make plans to strengthen them.

Section closing: *Turn to page 6.*

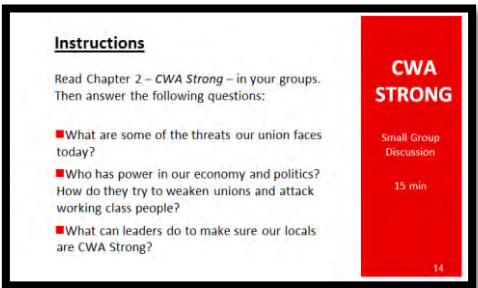
Years ago, successful local officers from different unions were asked to provide their best advice to new local officers. This list is a compilation of what they came up with.

Ask a different participant to read each list item. Pause after each one and ask participants a) how they interpret it and b) if they agree with it. After reading all 10, ask if they would add anything. Disagreement is good!

CWA Strong (30 min)



Slide 13. Click on the image in the slide to play the CWA Strong video. (3 min)



Slide 14. For this next exercise I am going to break you up into groups to read Chapter 2 and answer the questions you see on the slide. I am going to give you 15 minutes in your breakout rooms and then we will come back and share answers. Make sure to appoint someone to take notes and someone to report back.

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

Remind participants to take a screen shot of the questions or jot them down since they won't be able to see the screen in their breakout rooms.

Bring participants back to debrief.

Debrief (10 min)

So, what are some of the threats our union faces today? *[anti-worker agenda pushed by corporate politicians; 28 states are Right to Work and we face threat of national right-to-work legislation, impact of Janus vs. AFSCME on public sector unionism; unemployment due to the economic crisis caused by COVID-19; the National Labor Relations Board has become a hostile environment for workers]*

And where do these threats come from? Who has the power in our country and what tactics do they use to attack unions and the working class? *[making it harder for workers to join unions (intimidation, harassment, threats to send jobs overseas), legislative attacks (Right-to-Work, decertification, dues deduction, attacks on healthcare lower the floor and make it harder to bargain healthcare for our members, offshore and outsource union jobs, tax cuts for corporations)]*

So what is our role? What do we need to do as leaders to keep CWA Strong? *Take a few answers from the group. Then ask participants to turn to page 12 and take turns having volunteers read each bullet point. Ask follow up questions like "Does this already happen in your local? Why is this important? etc to get conversation going)*

CWA Organization (30 min)



Slide 15. Please turn to page 15 in your manual.

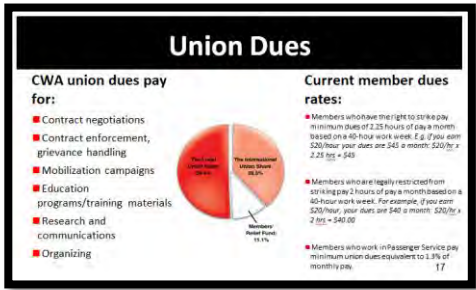


Slide 16. Ask participants to open their manuals to page 16. Review the CWA structure (pages 16-20) (5 min).

Note to Instructor: Don’t spend a ton of time on the CWA structure here. We suggest you only briefly cover the above item since many aspects of the CWA structure are dealt with in other chapters.

Next, review the District structure chart. Briefly discuss the role of District staff and any other pertinent information (5 min).

Let participants know what else is covered in the section so that they can refer back to it or read it on their own time.



Slide 17. Ask participants to turn to page 21 in their manuals. Review how dues are used. Let participants know that Chapter 25 – Members Relief Fund – explains the MRF in more detail.

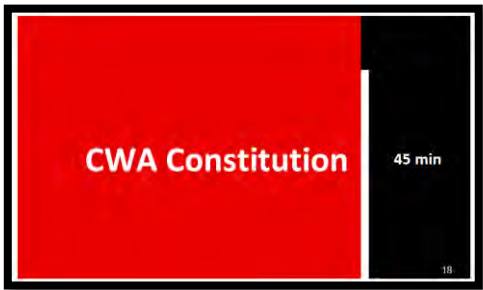
Together hundreds of thousands of dues-paying members make up our union. Monthly dues are how we each chip in to fund a strong, independent organization with resources to defend our rights.

The dues rates and structure are determined by CWA members – this is one of the many union policies set by convention delegates elected by rank and file members.

CWA union dues pay for the staff, legal services, materials and programs we need to build power for members. *Review specifics from the slide or in the manual on page 21.*

In CWA, generally 60% of our dues remain with the local to fund representation and other activities. The remaining 40% are split between the International Union and Members Relief fund. This breakdown will vary slightly in each local.

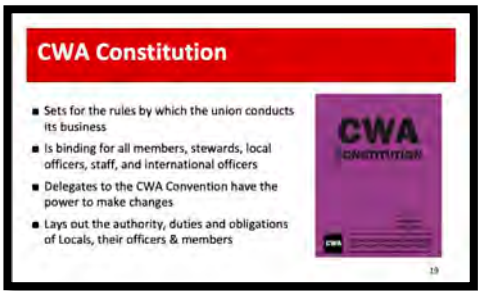
CWA Constitution (45 min)



Slide 18. Ask participants to turn to page 33 for a discussion about the CWA Constitution.

Trainer discussion question: What do people know about the CWA Constitution? How are rules made and changed?

[Democratically elected delegates to the CWA Convention have the power to change or amend the Constitution – just like the Constitution of the United States it’s intended to be a living, breathing, changing document that governs the inner life of our union. This is part of our commitment to democratic unionism]

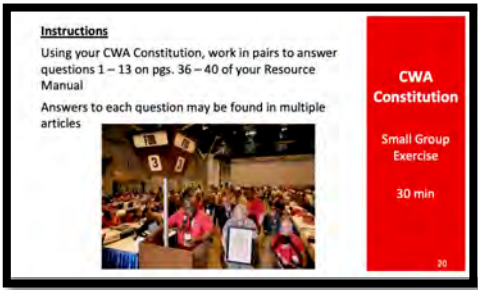


Slide 19. The CWA Constitution lays out the rules that the Union follows in conducting its business. Whether or not you agree or believe in every single provision, the Constitution is binding for all members, stewards, local officers, international union staff and international officers – so this applies to everyone from President Claude Cummings to rank-and-file members.

Just like the Constitution of the United States, this is a living, changing, breathing document. Delegates to the CWA Convention – who are democratically elected by the membership – have the power to make changes to the Constitution on the Convention floor – and have done so many times.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

The Constitution also lays out the authority, duties, and obligations of Locals – and these obligations are in your manual on pages 34 and 35. You’ll get a chance to review them during the next exercise.

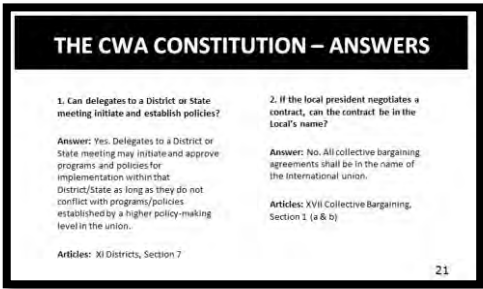


Slide 20. In this next exercise you will get a chance to get more familiar with the different parts of the CWA Constitution, and the specific requirements for Local Officers.

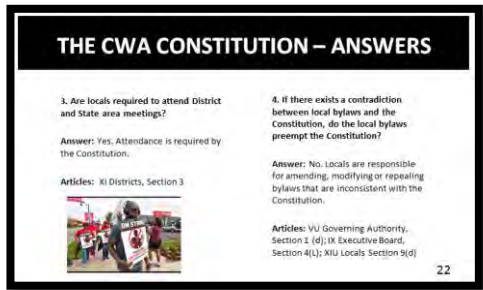
In a moment I will send you into breakout rooms but first let’s all open our resource manuals to page 36. Use your constitution to answer each question, citing the article and page # that has the answer.

Similarly to working with union contracts, the goal is not to memorize the Constitution but to learn how to work with it to find answers you need.

Note: If you are short on time, assign each group 3 or 4 questions so that participants have time to complete the exercise and each question gets answered. During the exercise, spend time in each breakout room to hear what questions, difficulties, and discussions groups are having. This will help you lead the debrief and discussion portion of the exercise.



Slide 21. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.



Slide 22. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

Question 4: When you are amending local bylaws, it is a good idea to submit the changes to your Staff

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

Rep to check for preliminary compliance before putting changes to a membership vote. This will help prevent your local from having to incur the expense of putting a local bylaw change to a membership vote twice because it was found not to be in compliance with the CWA Constitution when reviewed by the Executive Board.

THE CWA CONSTITUTION – ANSWERS

5. Delegates to the CWA Convention adopt a position on an issue. A new local president holds a membership meeting the following month and explains the position passed at the Convention. After some discussion a member rises and offers a motion which contradicts the position offered by the Convention. The local president puts the motion to a vote at the membership meeting and it passes. Does the local membership meeting have the right to do this?

Answer: No. The Local must abide by the convention decisions. However, a Local may try to change the position at the next convention by supporting the election of delegates to the convention who agree with their position. In the meantime, they must follow the decisions of the convention. The local president should never have allowed the motion.

Articles: VIII Convention, Section 7(b); XII Locals, Section 5 (f and g)

23

Slide 23. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

THE CWA CONSTITUTION – ANSWERS

6. Where in the Constitution are the duties and responsibilities of locals spelled out? What are they?

The duties and responsibilities of CWA locals, their offices, and members, in addition to those otherwise set forth in the Constitution or in their respective bylaws and rules are:

1. To represent the workers in their respective jurisdiction relating to Local matters

2. To actively implement all union programs and carry out policies established by District, State or Area meeting at which it is required to be represented

3. To abide by the Constitution, the decisions of the Convention, the Executive Board, and the decisions resulting from the referendum procedure

4. To adopt bylaws and rules not inconsistent with the Constitution and to repeal, amend or modify such rules and bylaws as may be incorporated therein with, voluntarily, or at the direction of the Executive Board, subject to the right of appeal to the Convention

5. To establish and maintain actively functioning organizing, education, legislative political, human rights committees, and such other committees as may be necessary to effectuate the policies of the local, the union, and the District/State/Area

24

Slide 24. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

THE CWA CONSTITUTION – ANSWERS

6. Where in the Constitution are the duties and responsibilities of locals spelled out? What are they?

The duties and responsibilities of CWA locals, their offices, and members, in addition to those otherwise set forth in the Constitution or in their respective bylaws and rules are:

6. To represent the members of the local at all District/State/Area meetings, and at quarterly meetings of local representatives with their international staff at such times and places as may be set by the Vice-President or the VP

7. To maintain an active internal membership development program

8. To maintain an active organizing program and budget monies to support the local's efforts and assist the union in reaching a goal of 10% of resources to be spent on growth

9. To do all other things necessary for the proper disposition of matters which may come before the Local for consideration

25

Slide 25. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

THE CWA CONSTITUTION – ANSWERS

7. Where in the Constitution is the procedure for handling charges filed against a member or officer? Explain the procedure.

Articles: XI Trials and Appeals, Section 2

Charges must be submitted within 60 days of the time the accuser becomes aware of the alleged offense, charges made against a member or officer must be made in writing, signed and sworn by the accuser and filed with the recording officer of the local. Charges of offenses are described in Article XIX, Section 1.

8. Where in the Constitution is the procedure for handling an election challenge? Explain procedure.

Articles: XV Election, Section 4

Any challenge to the conduct of an election must be filed in writing with the Election Committee within 10 days of the tentative certification of the results. The Election Committee shall rule on any such challenges and shall, within 20 days of the tentative certification of the results, make a final determination or certification.

26

Slide 26. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

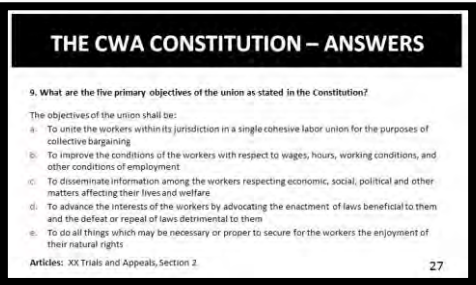
For Question 8, add: Such determination shall be subject to the right of appeal to the governing

body and to the membership of the Local.

18

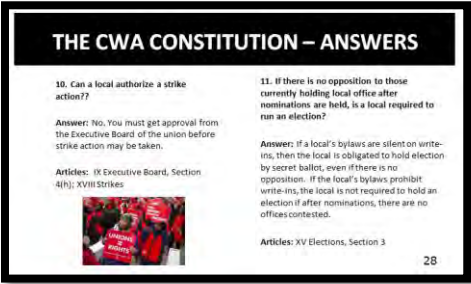
INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

While a challenge to an election is pending, the officers certified by the Election Committee in its final determination shall be the elected officers of the Local. Those officers shall remain in office unless the Election Committee’s determination is reversed by the Executive Board of the union or a new determination is made pursuant to the results of a properly ordered, rerun election.



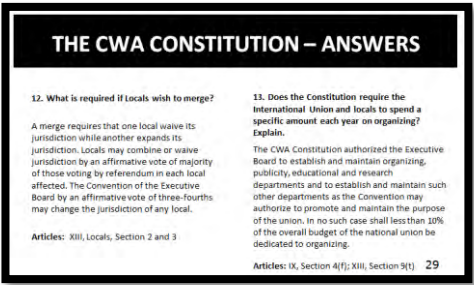
Slide 27. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

Also point out: Many portions of the CWA Constitution have been amended and changed over time. However, this section has never been altered since the very first CWA Constitution was written in 1946.



Slide 28. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

Question 11: And just as a reminder, local officers must be nominated and elected during the months of September, October, November, and December. The term of local officers is 3 years or until their successors have been duly elected and qualified by the elections committee.



Slide 29. Click for each question to appear on the screen. Allow groups to answer before clicking through to the answer and the article of the Constitution where the answer is found.

Question 12: Also to note, application to change jurisdiction must be made in writing on forms provided by the Secretary-Treasurer of the union and must be signed by at least 5 individuals who are eligible for membership in the local.

Question 13: The CWA Constitution also authorized locals to “maintain an active organizing program and budget monies to support the Local’s efforts as well as assisting the union in reaching a goal of 10% of resources to be spent on growth.

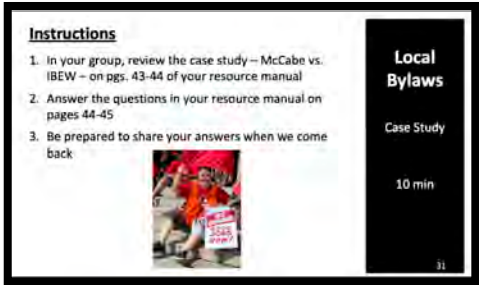
The Role of Local Bylaws (30 min)



Slide 30. In this next section, we are going to talk about Local Bylaws. Local bylaws can’t conflict with what’s in the CWA Constitution, but they do vary by local.
Any changes to the local bylaws must be voted on by the membership.

Can I get a volunteer to read the paragraph at the top of page 43?

Trainer question: Can anyone give an example of a bylaw from your local? *[Secretary-Treasurer must have authorization, documentation, and an explanation for all expenses]*



Slide 31. We are going to look at a case study to understand how these local bylaws work in practice. In a moment I’m going to break you out into small groups. In your group, open your manuals to pages 43 and read the McCabe v. IBEW case study out loud. Then, answer the questions on pages 44-45. You’ll have 10 min. Make sure to appoint someone to take notes and report out to the big group when we come back.




Slide 32. Ask a few groups to share their answer before clicking to reveal the answer on the screen.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

DEBRIEF: MCCABE v. IBEW

2. What new reimbursement policy did the local implement?

Answer: A fixed amount of money per week to local officers for all expenses incurred.



33

Slide 33. Ask a few groups to share their answer before clicking to reveal the answer on the screen.

DEBRIEF: MCCABE v. IBEW

3. Did the local bylaws reflect the change?

Answer: No.




34

Slide 34. Ask a few groups to share their answer before clicking to reveal the answer on the screen.

DEBRIEF: MCCABE v. IBEW

4. What was member Smith's objection?

Answer: Mr. Smith thought the officers were receiving money they were not entitled to.



35

Slide 35. Ask a few groups to share their answer before clicking to reveal the answer on the screen.

DEBRIEF: MCCABE v. IBEW

5. How do you think the court ruled? In favor of the local or Mr. Smith? Why?



36

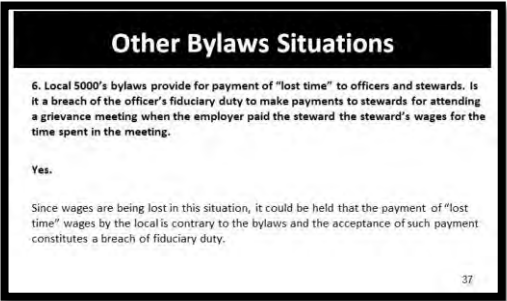
Slide 36. Ask a few groups to share their answer before clicking to reveal the answer on the screen.

Take a few responses from the group before sharing how the court ruled in the case.

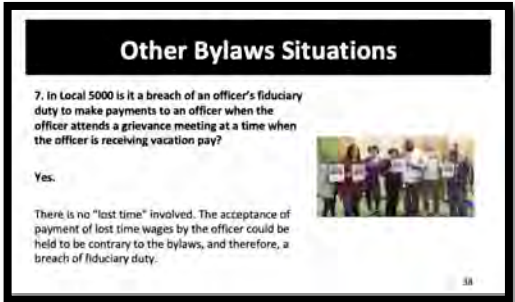
The court held that all payments to officers of the fixed weekly expense allowance were improper and had to be paid back because they were contrary to out-of-pocket expense reimbursement procedures of the local’s bylaws. The Executive Board and the membership may have discussed the new

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

procedures, but the new procedures were not properly adopted and made a part of the local bylaws. Therefore, the procedures were unauthorized and payments received in accordance with the new procedures constituted breaches of the officer’s fiduciary duty.



Slide 37. Ask one group to share their answer before clicking to reveal the answer on the screen.



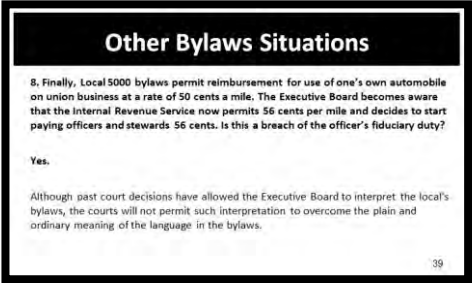
Slide 38. Ask one group to share their answer before clicking to reveal the answer on the screen.

You can also add:

On the other hand, it could be argued by the officer that vacation is an accrued right which is earned by service, and that is not intended to be considered as paid wages when considering whether or not an officer is to be paid for lost time. The better and safer course of action is to be certain that the bylaws clearly provide for the types of payments that are to be paid.

Bylaws can state the officers and stewards are to be paid a salary or wages for services performed on behalf of the union without regard to payments received from the employer. Or bylaws could state that payments for holidays or vacation are not to be considered as time paid by the employer when determining if an officer is entitled to be paid wages for attendance at grievance meetings, district meetings, conventions, etc. The possible variations are almost limitless.

Emphasize that the key is to clearly provide in the bylaws what payment can be made, and not to make any payments which do not fit the guidelines, authorized by the bylaws.



Slide 39. Ask one group to share their answer before clicking to reveal the answer on the screen.

Read the answer on the slide and add the following: This means that if the bylaws permit reimbursement for use of one’s automobile on

union business at a rate of 30 cents per mile, the Executive Board cannot interpret that 51 cents is proper because the IRS now permits 51 cents. The bylaws must be **changed** to 51 cents to avoid breach of fiduciary duty.

When you’ve finished this exercise, ask for a volunteer to read the box “Breach of Fiduciary Responsibility” on the bottom of page 46 before moving on.

Financial Responsibilities of Local Officers

(90 min)



Slide 40. ALL local officers stand in a fiduciary position with respect to the union and its members. Often time’s people think this is only true of the Treasurer. Common misconception.

Note to Instructors: Throughout this section, please continue to emphasize that all local officers are responsible for the finances of the local. This responsibility is not unique to the secretary-treasurer or the treasurer.



Slide 41. Officers’ fiduciary responsibilities are described in four different documents that you can see on the slide. Federal Law, and specifically the LMRDA, the CWA Constitution, Local Bylaws, and Local Union Policies.

Trainer Question: Does anyone know what LMRDA stands for? Or where it comes from? [LMRDA:

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

Labor-Management Reporting and Disclosure Act; passed in 1959 as an amendment to the NLRA].

Federal Law - LMRDA


1. To hold the union's money and property solely for the benefit of the union and its members;

2. To manage, invest and expand the union's money in accordance with the union's constitution, bylaws and resolutions adopted pursuant to them;

3. To refrain from dealing with the union as an adverse party;

4. To refrain from acquiring any financial or personal interest in conflict with that of the union;

5. To account to the union for any profit received by the officer in connection with transactions conducted by the officer on behalf of the union.



42

Slide 42. The Labor Management Reporting and Disclosure Act is a Federal law which imposes five specific duties of local officers and union representatives who occupy a position of trust in relation to union members.

Let’s take a look at these responsibilities on page 49 in your resource manual. *Ask for different volunteers to read each fiduciary responsibility as well as the example listed in the manual.*

CWA Constitution


1. To maintain adequate files and records:

To have an annual audit of the financial records of the local prepared by competent persons

To make financial records available to the membership at least annually

To furnish the union's Secretary-Treasurer with an annual financial statement

2. To provide for the bonding of local officers and other persons who handle union funds and property



43


Slide 43. The CWA Constitution builds on the duties of local officers required by law. Let’s take a look at which duties are specifically imposed by the CWA Constitution – we are on page 51.

Take volunteers to reach each section. Then let participants know we will skip over local bylaws since we discussed that in the previous chapter.

Union and Local Operating Practices

In addition to bylaws, some locals might have established operating practices or rules concerning the financial administration of the local.

Does your local have operating practices? What are some examples of this?



44

Slide 44. The fourth document that identifies officers’ fiduciary responsibilities is the local’s union policies. In addition to bylaws, a local may have established operating practices or rules concerning the financial administration of the local.

Give examples. Ask participants if any of the locals have operating practices and ask for examples.

Instructions

Work with your partner to answer questions 1-20 (pg. 56 of your resource manual).

Be prepared to share your answers when we come back.



45

Local Finances

Partner Exercise

1 hour

Slide 45. For this next exercise please open your resource manuals to page 56. In a moment I am going to break you out into groups of 2 to complete this exercise. You’ll have an hour to complete as many of the questions as you can.

A note as you begin this exercise: each of the questions in this exercise is a real life situation


INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

that has occurred. You and your partner might not agree on every answer – and that’s ok. The very purpose of this exercise is to stimulate discussion around a broad range of issues having to do with the fiduciary responsibilities of local officers.

DEBRIEF – QUESTION 1

1. Who is responsible for the proper handling of the local's property and financial resources?

- A. Local president
- B. Local treasurer or secretary-treasurer
- C. Local's CWA staff representative
- D. Local's Executive Board
- E. All of the above




46

Slide 46. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF- QUESTION 1

1. Who is responsible for the proper handling of the local's property and financial resources?

- A. Local president
- B. Local treasurer or secretary-treasurer
- C. Local's CWA staff representative
- D. Local's Executive Board
- E. All of the above



47


Slide 47. E is correct!

To varying degrees, everyone is responsible for making sure the assets of the local are properly accounted for and expended. The Secretary-Treasurer has the most responsibility, but he/she is not the only one. The LM report requires two signatures, the Secretary-Treasurer and the President. By virtue of the position, the President has overall fiduciary responsibility which extends to the proper handling of local finances. In addition, the local executive board has fiduciary responsibility which extends to the proper handling of local finances. In addition, the local executive board has fiduciary responsibility by virtue of its power to authorize expenses and allocate the assets of the local.

DEBRIEF – QUESTION 2

2. Who should be authorized to sign checks on behalf of the local?

- A. President only
- B. Secretary-treasurer only
- C. President and secretary-treasurer
- D. President, secretary-treasurer, and one other officer



48

Slide 48. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

DEBRIEF – QUESTION 2


2. Who should be authorized to sign checks on behalf of the local?

A. President only

B. Secretary-treasurer only

C. President and secretary-treasurer

D. President, secretary-treasurer, and one other officer



49

Slide 49. In this case, C or D could both be correct. CWA has a standing practice requiring two signatures on all checks issued by the local. Local bylaws should require that all checks be signed by two officers. This practice is supported by auditing firms and government agencies responsible for overseeing union activities. Depending on the

local’s circumstances, it may be beneficial to have a third officer capable of signing checks in the event the president or secretary-treasurer are not available (vacation, etc.)

Anyone designated to handle union funds must be bonded. Bonding is available through the international union secretary-treasurer’s office.

DEBRIEF – QUESTION 3


3. Who can authorize expenditures from the local's treasury?

A. Local president

B. Local secretary-treasurer

C. Membership

D. CWA staff representative



50

Slide 50. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 3


3. Who can authorize expenditures from the local's treasury?

A. Local president

B. Local secretary-treasurer

C. **Membership**

D. CWA staff representative



51

Slide 51. The authority to spend local funds requires the approval of the local’s membership. Sometimes, through action taken at local meetings, the membership delegates certain spending authority to the president or to the executive board. Generally, these authorizations include items such as paying rent, AFL-CIO per-capita, meeting refreshments, office and steward supplies, etc. In addition, the


membership can sometimes cap the amount that may be spent in between meetings.

Regardless of the circumstances, the secretary-treasurer should be able to find on file where the membership approved the expenditure before paying the bill. It is very uncommon for any government agency reviewing a local’s records, in cases where there is no record of membership action, to be satisfied with the defense of “it has always been handled that way.”

DEBRIEF – QUESTION 4

4. When can union funds be deposited in a local officer's personal account?

- A. Never
- B. After officers prove their trustworthiness
- C. When it is difficult to deposit it in the union account
- D. When the local president or secretary-treasurer says its ok




52

Slide 52. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 4

4. When can union funds be deposited in a local officer's personal account?

- A. **Never**
- B. After officers prove their trustworthiness
- C. When it is difficult to deposit it in the union account
- D. When the local president or secretary-treasurer says its ok




53

Slide 53. Never. Union funds are never to be mixed with personal funds.

DEBRIEF – QUESTION 5

5. Is it proper for a local secretary-treasurer to refuse to pay a bill if the president directs them to pay a bill?

- A. Yes
- B. **No**




54

Slide 54. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 5

5. Is it proper for a local secretary-treasurer to refuse to pay a bill if the president directs them to pay a bill?

- A. **Yes**
- B. No




55

Slide 55. Yes – the secretary-treasurer should only pay bills that have proper authorization regardless of who submits them.

DEBRIEF – QUESTION 6

6. Is a local secretary-treasurer relieved of their fiduciary responsibility if directed by the local president or the executive board to pay a bill that has not been properly authorized?

A. Yes
B. No




56

Slide 56. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 6

6. Is a local secretary-treasurer relieved of their fiduciary responsibility if directed by the local president or the executive board to pay a bill that has not been properly authorized?

A. Yes
B. No



57

Slide 57. The secretary-treasurer is not relieved of their fiduciary responsibilities unless they leave office. Following an order is not proper defense for improperly conducted the affairs of the local.

DEBRIEF – QUESTION 7

7. If a fellow officer asks the local treasurer to loan him \$200 from the local treasury which he promises to repay the next payday, the treasurer should do which of the following?

A. Have the officer sign a promissory note before handing over the money
B. Make a check out to cash for \$200 and give the officer cash instead of a check
C. Tell the officer the executive board must approve all loan requests
D. Furnish the officer with the address and phone number of the credit union

58

Slide 58. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 7

7. If a fellow officer asks the local treasurer to loan him \$200 from the local treasury which he promises to repay the next payday, the treasurer should do which of the following?

A. Have the officer sign a promissory note before handing over the money
B. Make a check out to cash for \$200 and give the officer cash instead of a check
C. Tell the officer the executive board must approve all loan requests
D. Furnish the officer with the address and phone number of the credit union

59


Slide 59. Personal loans should not be issued to local officers or members. If someone has dire financial problems, they should be referred to a credit union, United Way, etc. The Department of Labor has strict rules regarding this issue. Consequently, avoid any personal loan activity.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

DEBRIEF – QUESTION 8

8. The local decides that the officers should have credit cards to pay for expenses incurred while on union business. The card should be issued as follows:

- A. In the local name only
- B. In the name of the local and officer
- C. In the name of the president only
- D. In the name of the officer only
- E. None of the above




60

Slide 60. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 8

8. The local decides that the officers should have credit cards to pay for expenses incurred while on union business. The card should be issued as follows:

- A. In the local name only
- B. In the name of the local and officer
- C. In the name of the president only
- D. In the name of the officer only
- E. None of the above



61

Slide 61. D. We strongly recommend that locals not provide credit cards to officers in the locals. Instead it is recommended that the local pay a credit card membership fee for the officers who travel extensively on union business. The officer can then submit documentation for reimbursement. This arrangement avoids the


temptation of using a credit card issued to the local for purposes for which it was not intended.

If the card is issued in the name of the local, the local becomes liable for any expenses charged with the card regardless if the activity is related to union business. The misuse of credit cards can become a major problem. You are advised to avoid having the local name on the account.

DEBRIEF – QUESTION 9

9. An officer can charge personal expenses on the local's credit card in which of the following cases:

- A. If the officer gets permission from the local president
- B. If the officer is low on cash when out of town
- C. At the officer's discretion
- D. Under no circumstances




62

Slide 62. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 9

9. An officer can charge personal expenses on the local's credit card in which of the following cases:

- A. If the officer gets permission from the local president
- B. If the officer is low on cash when out of town
- C. At the officer's discretion
- D. Under no circumstances



63

Slide 63. If a local still decides to issue credit cards, it should develop written rules regarding their use. The best policy is that no personal expenses should ever be charged on the card.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING


DEBRIEF – QUESTION 10

10. Under which of the following conditions should the local secretary-treasurer make an advance to a local officer.

A. If the officer is attending a CWA convention or meeting

B. The officer is short of cash

C. The local president directs the secretary-treasurer to make an advance



64

Slide 64. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.


DEBRIEF – QUESTION 10

10. Under which of the following conditions should the local secretary-treasurer make an advance to a local officer.

A. If the officer is attending a CWA convention or meeting

B. The officer is short of cash

C. The local president directs the secretary-treasurer to make an advance



65

Slide 65. Advances should only be issued in situations where it is not feasible to reimburse expenses. The amount of the advance should be limited to expected expenses. No officer should have more than one outstanding advance. Local practices regarding advances should be in writing and furnished to the officer when issuing the advance.

DEBRIEF – QUESTION 11

11. If an advance is given, when should the advance be retired?


A. Within 30 days

B. Within 60 days

C. Within one year

D. When the officer returns from the trip

E. When the officer retires or leaves office



66

Slide 66. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 11

11. If an advance is given, when should the advance be retired?

A. Within 30 days

B. Within 60 days

C. Within one year

D. When the officer returns from the trip

E. When the officer retires or leaves office



67

Slide 67. The officer is to retire the advance when returning from the union activity. The Department of Labor considers an outstanding advance an illegal interest-free loan if it is not retired within 60 days.

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

DEBRIEF – QUESTION 12


12. If an individual refuses to retire an advance, what course of action should the local secretary-treasurer take?

A. Notify the executive board

B. Bring it up at the next membership meeting

C. Call the staff representative assigned to the local

D. Notify the police



68

Slide 68. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 12


12. If an individual refuses to retire an advance, what course of action should the local secretary-treasurer take?

A. **Notify the executive board**

B. Bring it up at the next membership meeting

C. Call the staff representative assigned to the local

D. Notify the police



69

Slide 69. Immediate action should be taken to protect the local.

DEBRIEF – QUESTION 13

13. A local officer or executive board member submits a voucher requesting reimbursement for an expense which the secretary-treasurer does not believe was part of any union assignment. What course of action should the secretary-treasurer take?

A. Go ahead and pay the voucher and raise the issue at the next Executive Board meeting

B. Tell the local president about it and let the president make the decision if a payment is proper

C. Ask the person to further verify the expense

D. Don't pay the expense and see if the person brings it up

70

Slide 70. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 13

13. A local officer or executive board member submits a voucher requesting reimbursement for an expense which the secretary-treasurer does not believe was part of any union assignment. What course of action should the secretary-treasurer take?

A. Go ahead and pay the voucher and raise the issue at the next Executive Board meeting

B. Tell the local president about it and let the president make the decision if a payment is proper

C. **Ask the person to further verify the expense**

D. Don't pay the expense and see if the person brings it up

71

Slide 71. The secretary-treasurer should not reimburse an expense until proper authorization can be verified.

DEBRIEF – QUESTION 14

14. A local officer decides to drive to the CWA Convention instead of flying. The officer says he should receive the equivalent in cash since the local is not paying his airfare. Which of the following action(s) should the secretary-treasurer take?

A. Tell the officer the membership must approve before payment

B. Tell the officer the executive board must approve before payment

C. Pay the officer mileage instead of cash

D. Pay the officer the cash as requested

72

Slide 72. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

DEBRIEF – QUESTION 14

14. A local officer decides to drive to the CWA Convention instead of flying. The officer says he should receive the equivalent in cash since the local is not paying his airfare. Which of the following action(s) should the secretary-treasurer take?

- A. Tell the officer the membership must approve before payment
- B. Tell the officer the executive board must approve before payment
- C. **Pay the officer mileage instead of cash**
- D. Pay the officer the cash as requested

73

Slide 73. If the officer did not fly to convention, it is improper to pay airfare because the expense never occurred.

DEBRIEF – QUESTION 15

15. A local vice president spent all day in grievance meetings with the company. The company paid him his usual wages for the day. The vice president turns in a voucher for lost wages for the day. When the local secretary-treasurer questions the request, the vice president says he worked all evening and well into the night preparing reports for the day's meetings. What should the secretary-treasurer do?

- A. Pay the voucher; the explanation justifies the lost wages
- B. Refuse to pay the voucher
- C. Pay the voucher but bring it up at the next Executive Board meeting

74

Slide 74. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 15

15. A local vice president spent all day in grievance meetings with the company. The company paid him his usual wages for the day. The vice president turns in a voucher for lost wages for the day. When the local secretary-treasurer questions the request, the vice president says he worked all evening and well into the night preparing reports for the day's meetings. What should the secretary-treasurer do?

- A. Pay the voucher; the explanation justifies the lost wages
- B. **Refuse to pay the voucher**
- C. Pay the voucher but bring it up at the next Executive Board meeting


75

Slide 75. A local cannot pay for lost wages if there are no lost wages. This is an issue that continually draws the attention of the Department of Labor. The Department of Labor considers getting paid from two sources as **DOUBLE DIPPING** and deals with violations in a very serious manner.

Remember – if the individual did not lose wages you cannot pay lost wages.

DEBRIEF – QUESTION 16

16. The local's Community Services Committee raised \$500 from selling baked goods. The committee expects to spend the money on holiday baskets for some needy members of the community. The committee chairperson opens a checking account and deposits the funds, expecting to pay future bills as the baskets are purchased. Does this account need to be in the local's name?



- A. Yes
- B. No


76

Slide 76. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 16

16. The local's Community Services Committee raised \$500 from selling baked goods. The committee expects to spend the money on holiday baskets for some needy members of the community. The committee chairperson opens a checking account and deposits the funds, expecting to pay future bills as the baskets are purchased. Does this account need to be in the local's name?

A. Yes
B. No




77

Slide 77. Yes – because all funds are local funds regardless of the source.

DEBRIEF – QUESTION 17

17. The Community Services Committee decides to use some of the money they raised to buy pizza and soft drinks for the hard-working members who sold the baked goods. Is it proper to use the collected funds in this manner?

A. Yes
B. No




78

Slide 78. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 17

17. The Community Services Committee decides to use some of the money they raised to buy pizza and soft drinks for the hard-working members who sold the baked goods. Is it proper to use the collected funds in this manner?

A. Yes
B. No



79

Slide 79. Any expenditure of local funds requires membership approval, regardless of the source.

DEBRIEF – QUESTION 18

18. The local's practice requires the local president and secretary-treasurer to sign all checks. The local president is going on a two week vacation and will not be available to sign checks. The local president says he will sign a number of blank checks for the secretary-treasurer to use until he returns. Is this an acceptable practice?

A. Yes
B. No

80

Slide 80. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

DEBRIEF – QUESTION 18

18. The local's practice requires the local president and secretary-treasurer to sign all checks. The local president is going on a two week vacation and will not be available to sign checks. The local president says he will sign a number of blank checks for the secretary-treasurer to use until he returns. Is this an acceptable practice?


A. Yes
B. No

81

Slide 81. The reason why two signatures are required is to safeguard the local from someone improperly issuing checks. By pre-signing checks it eliminates this important protection.

DEBRIEF – QUESTION 19

19. The local's practice requires the local president and secretary-treasurer to sign all checks. The local president and secretary-treasurer live 250 miles from one another. The local president signs 10 blank checks every couple of months and gives or mails them to the secretary-treasurer. Is this an acceptable practice?




A. Given the distance – yes
B. No

82

Slide 82. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 19

19. The local's practice requires the local president and secretary-treasurer to sign all checks. The local president and secretary-treasurer live 250 miles from one another. The local president signs 10 blank checks every couple of months and gives or mails them to the secretary-treasurer. Is this an acceptable practice?




A. Given the distance – yes
B. No

83

Slide 83. No.

DEBRIEF – QUESTION 20

20. The local has about \$15,000 that is not needed for regular day-to-day operations. The money is currently in a checking account earning 1% interest. The local's secretary-treasurer decides to invest the money in AT&T stock, considering the stock has a good record of increasing in value. Is such a transaction permissible?




A. Yes
B. No

84

Slide 84. Ask for a volunteer pair to answer the question on the screen. Click to the next slide to reveal the answer.

DEBRIEF – QUESTION 20

20. The local has about \$15,000 that is not needed for regular day-to-day operations. The money is currently in a checking account earning 1% interest. The local's secretary-treasurer decides to invest the money in AT&T stock, considering the stock has a good record of increasing in value. Is such a transaction permissible?



A. Yes
B. No

85


Slide 85. The local's leadership should avoid any investment that puts the principal at risk. It is not proper to risk losing principal for a chance to

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

increase the return. The officer’s primary fiduciary duty is the safety of the principal – not to grow the funds. The fiduciary responsibility requires prudent management of the local’s assets. A safer investment tool (e.g. Certificate of Deposit) is preferred. When practical, investments in any one institution should not exceed insurance limits.

LM-30 Overview

- What is the LM-30?
- What is the stated purpose?
- Who must file?
- Are there exceptions?
- Examples of reportable items?
- When do I file?
- Where do I file?
- What if I still have questions?



86

Slide 86. Briefly review the purpose of the LM-30 and who must file. See pages 63-65.

1. You are a full-time officer of a union that represents employees of several different employers. One of the employers pays your expenses on a trip with management officials to a plant in another part of the country in order to view new equipment that the employer is purchasing and could lead to an increase in the number of union jobs. Do you need to report the travel expenses?

Yes

2. You are a full-time employee of a union that now represents employees of several different employers. One such employer is a non-profit organization that makes union-friendly t-shirts and posters. You have been a board member of the non-profit for many years. Do you have to report your role on the board?

Yes

LM-30

Group Exercise

87

Slide 87. Now we’re going to turn to page 66 in your resource manual to get a bit more practice working with LM-30 reporting. Read each situation 1-7 out loud and review answers.

3. You are a part-time officer of a local union. Your full-time job is working at a newspaper. The company hosts its annual charity golf tournament. Tickets normally run \$300/round but the employer gives you 2 complimentary tickets for golf and the dinner. Do you have to report this gift?

Yes

4. You are a part-time officer of a local union. Your full-time job is working at a telephone company. At an employee appreciation lunch, you win an iPhone in a raffle. Is this gift reportable?

No

LM-30

Group Exercise

88

Slide 88. Read each situation 1-7 out loud and review answers.

5. You are a part-time officer of a local union. Your full-time job is working at a telephone company. The employer offers you and 3 other co-workers demo models of the new GPS device. Is this gift reportable?

Yes

6. You have worked for a telephone company for 15 years that provided stock options to all its eligible employees. Now, you are a full-time union representative who decides to sell some of the company's stock. Does this sale need to be reported?

Yes

7. You are the secretary-treasurer of a local union. The local Executive Board agrees to hire your 15-year-old daughter to redesign and update the local website. Should you file an LM-30 to report this transaction?

Yes

LM-30

Group Exercise

89

Slide 89. Read each situation 1-7 out loud and review answers.

Setting Local Goals and Budget (45 min)



Slide 90. Each year, it’s important that local officers take the time to set goals. This helps make sure that the local has a proactive plan, instead of just reacting to whatever management does. Goals should be **specific, achievable, and measurable**.

Let’s all open our resource manuals to page 70 and take a look at what some sample goals might look like. *As you talk through the different goals, point out the ways in which they are specific, achievable and measurable. Offer a few examples of goals that do not meet those criteria as well.*

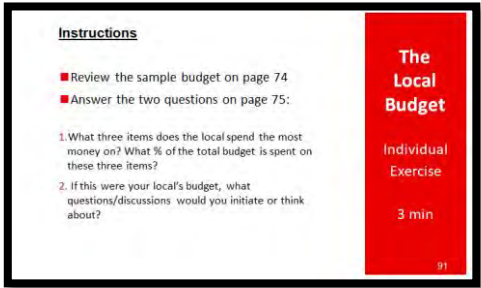
Budgets

Local officers must develop a budget for the year. The budget and the goals have to go hand in hand – the budget should be designed and structured to support the priority goals of the local.

For example, if one of the goals is to mobilize around specific contract negotiations coming up, money should be allocated for this purpose in the budget.

Can everyone please open their resource manuals to page 72? This is a budget worksheet that is a helpful tool in preparing your local budgets when you go back home. This worksheet has six different sections:

- I. Affiliations and Per Capita
- II. Office and Administration
- III. Wages and Expenses
- IV. Organizational Expenses
- V. Contributions
- VI. Contingency Reserve



Slide 91. Take a few minutes and review this budget on page 74 – and keep in mind this is a simplified version of what your local budget will look like.

Once you’ve reviewed the budget, take a look and answer the two questions on page 75 individually. When you are done, select the “thumbs up” feedback feature so I’ll know when we can move on. *Give participants 3 minutes to complete the exercise.*

Take a few responses from participants for each of the questions on the slide. See answer key below.

The point of this exercise is to get officers to think critically about how they spend the local’s money – and more specifically, to encourage officers to think about spending money in areas that support their goals and help build the local union. Emphasize that our budgets are a reflection of our priorities.

Key Takeaway

There is no right or wrong answer here. And there is no formula on how much a local should spend on each line item. The point is that each local needs to assess how much they are spending on different areas of running the local, and whether or not that supports their goals and builds the power of the union.

Answers to Questions on pg. 75

- 1. What three items does the local spend the most money on? What % of the total budget is spent on these three items?

Office and Administration: 30%

Wages and Expenses: 27%

Convention and Conference: 22%

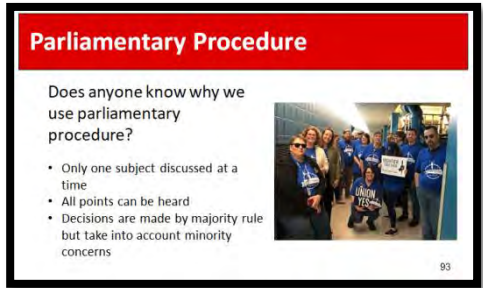
These three items equal **79%** of the total budget.

2. If this were your local’s budget, what questions/discussions would you initiate of think about?
- Are we spending too much on office and administration?
 - What is the breakdown of these expenses?
 - Can we get cheaper office space?
 - What is the breakdown on wages?
 - What are we paying lost time for and how much?
 - How many people are going to convention and conferences?
 - Are the right people going?
 - Are we spending too little on education, mobilization and lobbying?
 - How can we spend the money in a way that will make the local stronger and give it more power?

Parliamentary Procedure (60 min)

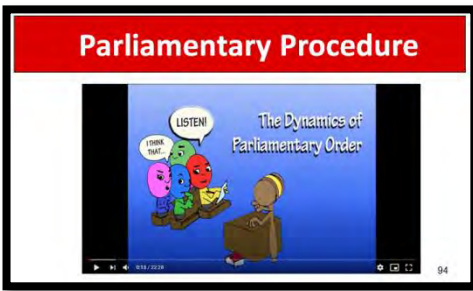


Slide 92. Parliamentary procedure is the traditional system used to run meetings – if you’ve gone to a CWA Convention you probably noticed that the whole convention was conducted using parliamentary procedure.



Slide 93. Trainer question: Does anyone know why we use parliamentary procedure? *[only one subject discussed at a time; all points can be heard; decisions are made by majority rule but take into account minority concerns]*

In addition to Convention, parliamentary procedure is used at Central Labor Council meetings, and many membership meetings. It is important to know the basics of Parliamentary Procedure in order to participate fully in discussions.



Slide 94. I'm going to show a videotape on parliamentary procedure. Take notes and pay attention because after the video there will be an exercise where you'll have to answer several questions on parliamentary procedure.

[Play the video. After the video is finished (but before the answers are revealed), ask participants to turn to page 82 in their manual and answer the questions. If there is time, send participants into breakout rooms with groups of 4 to complete the exercise. Refer to the answer key below when debriefing the exercise. Answers are also explained in the video.]

1. Choose the phrase which best completes the sentence. A point of order...

- a) Asks the Chair for information about the debate
- b) Changes the motion on the floor
- c) Requests a technical ruling from the parliamentarian
- d) **Requests a procedural ruling from the Chair**

Answer: D

2. Choose the phrase which best completes the sentence. When a main motion is on the floor...

- a) It may only be amended twice
- b) The maker of the motion and whoever seconds it must vote for it
- c) **It must be disposed of in some way before another main motion can be made**
- d) A call for the previous question automatically closes debate

Answer: C

3. Choose the phrase which best completes the sentence. The Chair has discretionary power to...

- a) Comment from the chair on the wisdom of a main motion or amendment
- b) Order the end of debate on a motion and bring that motion to a vote
- c) Refer a motion to a committee or postpone discussion of it
- d) **Recognize one speaker before another**

Answer: D

4. With reference to classes of motions, which statement is WRONG?

- a) A subsidiary motion changes the condition of a pending motion without either adopting or rejecting it
- b) **Tabling a main motion defers discussion until the next meeting**
- c) Incidental motions most frequently assert the rights of individuals within the organization
- d) A privileged motion interrupts consideration of anything lower in rank because of its immediate importance to the organization

Answer: B

5. With reference to motions, which is CORRECT?

- a) **An amendment to an amendment to a main motion, if passed, is added to the amendment to the main motion and not the main motion itself**
- b) The maker and whoever seconds the motion can agree to withdraw it from the floor. The motion is thereby withdrawn.
- c) Substitution of one main motion for another means that the substitute is automatically carried as a policy.
- d) All controversial subjects must be approved by a two-thirds majority of the voting members.

Answer: A

6. Three of the following are correct. Which one is WRONG?

- a) **The Chair may change the order of business if this is deemed necessary to complete the work of the meeting.**
- b) A main motion may be debated only after every higher ranking motion has been resolved, and the debate may continue only if no higher ranking motion intervenes.
- c) A simple majority may not suppress free discussion of an issue, but a two-thirds majority may do so.
- d) Reconsideration of a motion may be moved and seconded only by members who voted with the prevailing side on the original vote.

Answer: A

You might also want to bring a copy of "All the Rules at a Glance" which is available on page 85 to meetings you are chairing.

Local Union Committees (60 min)



Slide 95. Can everyone please open your resource manuals to page 147? In this section we are going to do a brief review of Local Union Committees. There are two main types of committees in CWA locals.

Trainer question: Does anyone know what the two different types of committees are? *[Constitutionally mandated standing committees; all other committees]*



Slide 96. Trainer question: Can anyone list some of the standing committees that you know of in your local? *Click to reveal a list of standing committees.*

Can folks turn to page 149 and take a moment to answer the question at the bottom of the page? Give me a “thumbs up” when you’ve had a chance

to come up with a few answers.

Trainer question: So, how do active committees benefit a local? *[Gets more members involved in the union; allows the local union to accomplish more things; develops the leadership of the members; gives every member a way to participate in the union based on their interests and skill sets; provides local leadership with additional input, feedback, etc.]*



Slide 97. In the chapter on CWA Strong, we reviewed the committees that should exist in every CWA local. Do folks remember what some of those committees were? *[Organizing, Political/Legislative/Women’s/Civil Rights & equity, Steward’s, Health & Safety].*

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

In some of your locals, each of these committees already exists but could use additional support to become even stronger. And in some of your locals, some of these committees still need to be built. Here are a few steps for getting a functioning committee off the ground.

The first step is to assign a local officer to each committee – this doesn't mean the officer has to attend every meeting but as officers it's important to support the Chair, checking in with them frequently to figure out what the committee is working on, and what obstacles they might be having. It is also important to make sure that the committee understands their job and what success looks like.

Have participants volunteer to read pages 150 through the top of page 151 – highlighting key points of each step of building a committee as you go. Also point out resources on page 151 on how to chair a meeting and how to maintain meeting notes. Suggest that local officers provide copies of this information to all their existing committee chairs as well as new chairs who begin.

*Next, ask participants to flip through pages 152 – 156. Point out the list of local committees and resources available. Here, also make sure to highlight the chapters on the human rights program (**Chapter 10**), legislative/political program (**Chapter 12**), as well as the health and safety program (**Chapter 11**).*

Also point out page 156 where participants can find sample committee meeting minutes. Let folks know this might be a useful resource and worthwhile to share with their local committees.

Instructor Note: This is also the section of the training where you can address Chapters 10 (Human Rights Committees) and Chapter 11 (Occupational Safety and Health) in greater detail. Focus on the sections of the curriculum that make the most sense for the group you are training and be sure to point out these chapters for participants to read on their own if they aren't covered during training.

Organizing (20 min)



Slide 98. Advance preparation: Invite a District Organizing Coordinator or Campaign Lead to come and review the priority organizing goals for the District. This section should include: existing campaigns, CWA’s approach to organizing, why we organize (pg. 159) as well as the different types of trainings available for activists in their locals who are

interested in organizing.

Internal Organizing (105 min)



Slide 99. As part of the CWA Strong plan every District/Sector/Division has been working with locals on internal organizing.

Review the work that has been done including the increase in percent organized and decline in non-members.

Emphasize the internal organizing has to be an every day ongoing part of the local’s work.

Point out who local leaders can contact to get help implementing an internal organizing program.

Review CH 17 on welcoming new workers in conjunction with this chapter. New worker orientations must be a key component of any internal organizing program.

Welcoming New Workers

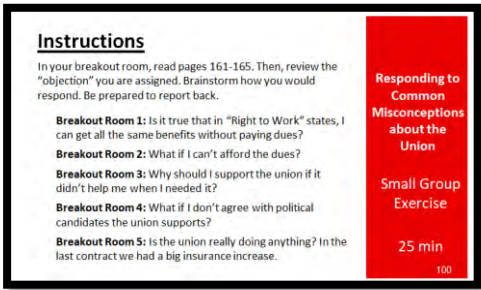
Locals must have a new hire outreach program. The best time to sign up a new employee to the union is during their first week on the job.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

In many contracts, we have negotiated for CWA to talk with new employees during employer orientations.

If there is no specific contract language on this in a unit, stewards and mobilizers must be trained to seek out new hires and sign them up into the union. All stewards and mobilizers should have a supply of union and PAF cards, as well as a CWA welcome letter or brochure from the local.

Point out the information in CH 17 and have participants take turns reading page 182 out loud. Then, do the same thing on pages 187-189.



Slide 100. Divide participants into breakout rooms of 3-4 people. Assign them to read pages 171-175 and complete the exercise on the slide – responding to common misconceptions about the union.

Assign each breakout room a different misconception. Participants will brainstorm responses. When you come back together as a big group, have every group share what they came up with and have the rest of the group provide positive and constructive feedback.

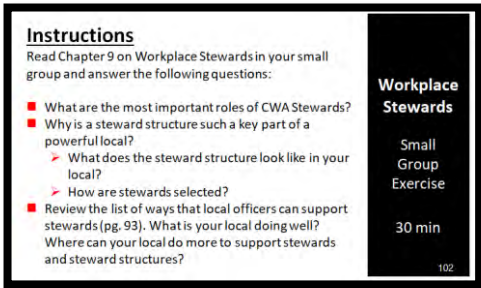
There are suggested messages/responses to each of these misconceptions in the resource manual (page 176).

Workplace Stewards (45 min)



Slide 101. Stewards are the most critical layer of union leadership. Unions are worksite based institutions where the members are the union, and the stewards are the leaders of our union in the workplace and in our communities every day.

Your ability as local officers to educate, unite, and move the union’s program among our members depends on having strong well-trained stewards, as well as steward structures. That’s what we’re going to dig into a big in this next section.



Slide 102. I’m going to send you to into breakout rooms to read Chapter 9 (page 89) on workplace stewards and answer the discussion questions on the slide. Make sure to nominate someone in your group to take notes and report back.

Also please take a picture of this slide or jot down the discussion questions as you will not have access to this slide in your breakout rooms.

Presidents, EVPs, Secretaries and Treasurers (120 min)



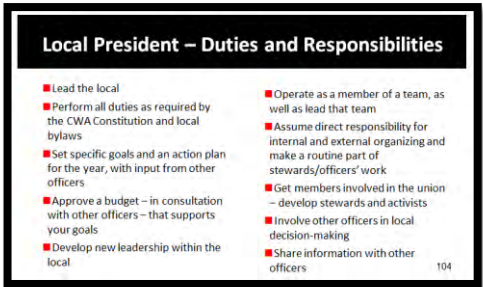
Slide 103. During the next section, we are going to cover more specific information relating to the duties of the Local President, the Treasurer, and the Secretary.

There is no chapter for Vice President or Executive Vice President because the responsibilities of those

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

positions vary from local to local. However, many areas of responsibility for those positions are covered throughout various sections of this manual and training.

Let’s start by reviewing the responsibilities of the Local President.



Slide 104. Review the many responsibilities listed on page 201.



Slide 105. After you have reviewed each of the responsibilities, have a volunteer read the paragraph at the bottom of page 201.

Instruct participants to study the rest of the chapter on their own and ask participants to turn to page

206. Ask for a volunteer to read the box on pg. 206, “What Are They Saying About You?” Make sure to emphasize the importance of keeping fellow officers plugged in and informed about what’s happening in the local and the broader union.

Treasurer



Slide 106. In this next section we are going to talk about the role of the treasurer. Even though the local treasurer has the responsibility for the day-to-day financial operations, it is important for the other officers to have a working knowledge of this information.

Let’s now please turn to pages 211 and 212 in your resource manual. These are a checklist of critical documents. For folks who are going to serve as treasurers in your

INSTRUCTOR'S MANUAL: LOCAL OFFICER TRAINING

local, when you get back to your local, please go through this list and make sure you have each of the documents necessary for your local.

Now please turn to page 213 in your resource manual to the page titled, "Getting Started as the Local Treasurer." *Review the list briefly and emphasize that treasurers should take a full day to review this list in depth and familiarize themselves with these responsibilities and documents. They should reach out to you if they have any questions.*

We are going to cover a few top line things that everyone needs to be familiar with now, but we expect treasurers to read this chapter in greater depth and reach out if they have questions.

DUES CHECK

Now, let's turn to page 217 where you'll see CWA Dues and Processing Overview. This is most likely of interest to all local officers and this is the section of the manual where you can find most dues-related information. If you flip to the next page, you'll also find a list of all possible dues deductions.

LOCAL STATEMENT

It's important that locals – and specifically the treasurer – carefully review and reconcile the dues deposited with the local statement/settlement report.

BANK ACCOUNTS

Now if folks can please turn to page 222 to the page with "Bank Accounts" written on the top.

Time permitting: Ask different volunteers to read each paragraph of this page out loud; if you are short on time ask participants to quickly review it on their own.

One of the very most important takeaways here – which you might remember from the section on Financial Responsibilities – is that **1) two officers must sign all checks; and 2) officers should never sign a blank check**

BOND COVERAGE

Now let's take a look at the bottom of page 225 in your resource manual. We're going to briefly review the information on Bond Coverage. *Read aloud or briefly cover the information in the resource manual on bond coverage.*

LOCAL COLLECTION OF DUES PROGRAM

Now we’re going to talk a little bit more about how locals can collect dues. We’re back on page 217. *Briefly review the process of local dues collection.* Under this program, locals receive dues checks directly from the employer and then remit the international union’s per capita. This is for local bargaining units that are:

- Wholly within one local
- Are not part of a telecommunications system (United, GTE, etc.)

Authorization to collect dues is an alternative process (i.e. bank account or credit card) may be required if the employer stops payroll deductions at CBA expiration. Make sure participants also understand the definition of “per capita” – see box on page 218 for more information.

LABOR DEPARTMENT AUDIT

Lastly in this section, can everyone please turn to page 227? On this page you’ll see a sample letter from the Department of Labor sent to a CWA Local. Each year, the labor department will audit some of our locals. This letter is sampled in the manual to give you an idea of the kind of documents the government will ask for if your local is audited. *Have participants take turns reading out loud the information requested (a-i) to reinforce why it is important to do all the procedures reviewed in this training.* Lastly, and this is particularly relevant for secretary-treasurers, remember that for all expenses, you must have: **a) authorization; b) documentation; c) explanation.**

Local Secretary



Slide 107. *Highlight the responsibilities of the local secretary – found on page 231 of your resource manual. Go around the room and ask each participant to read a responsibility found on the list on page 231.*

Point out that the membership report is the core of the secretary’s job and keeping it updated is critical.

Then ask participants to turn to page 233 in their manual. Review “How to Use Membership Reports.”

Once you’ve reviewed the Membership Reports, ask participants to turn to page 234 in their manual. Have a participant read the paragraph at the top of page 234 to explain the importance of minutes. Review what minutes should include (found on the bottom of page 234)

Trainer Discussion Question: Why are minutes so important to a local?

Also point out that any minutes from the previous meeting must be approved at the following meeting.

Enforcing Union Security Agreements and Agency Fee Objections (20 min)



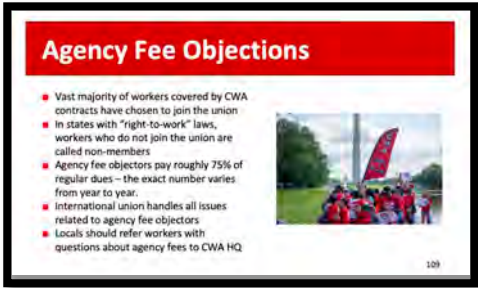
Slide 108. Briefly explain the concept of Agency Fee Objectors. Refer to the talking points below.

The goal of this section of the presentation is to familiarize officers with the Agency Fee Objectors policy. Explain to new officers here that any questions and requests should be referred to the

Agency Fee Administrator at CWA headquarters.

The CWA STRONG program has launched internal organizing campaigns in both our public and private sector units. Given the attacks on unions, we must remain vigilant regarding our non-member numbers. Every local must have an ongoing internal organizing program to keep bargaining units strong enough to withstand the blows from anti-union opponents.

Now we’re going to talk a bit more about agency fee objections and questions that might come up.



Slide 109. So let’s talk a bit more about common questions about agency fee objections.

1. The vast majority of workers covered under CWA contracts have chosen to join the union and become members. Because membership is voluntary, those who do not join are called either non-members or agency fee payers.
2. In states with right-to-work laws, workers who do not join the union are called non-members and pay no dues at all. In states without “right-to-work laws” and where there is a union security clause in the contract, private sector workers who do not join must pay an agency fee equal to full dues as a condition of employment. These workers are called “agency fee payers.” These fees are no longer required for public sector workers after *Janus v. AFSCME* Supreme Court decision.
3. The portion of dues that objectors have to pay varies from year to year. Agency fee objectors pay around 75% of regular dues. Agency fee payers have the right to object to paying more than the costs of direct worker representation (collective bargaining, contract administration, and grievance handling).
4. The international union handles all agency fee objector requests, appeals, and issues as well as the reduction checks. *Make sure all participants understand what a reduction check is.*
5. Locals should refer workers who inquire about agency fee objector status to the Agency Fee Administrator at CWA Headquarters.

Retiree Activism (10 min)

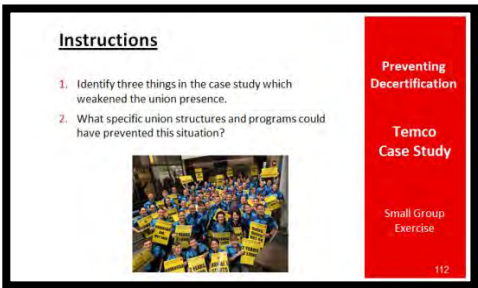


Slide 110. Ask participants to turn to page 267 in their manual. Explain the purpose of the CWA Retired Members Council and Retiree Chapters. Option: Ask a participant to read on pg. 267 under “Retire Activism Goals.”

Preventing Decertification (30 min)

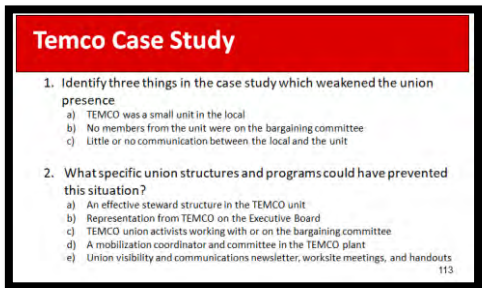


Slide 111. Preventing Decertification and Loss of Majority Support. *Explain to the participants what decertification and withdrawal of recognition means and the role employers often play in promoting decertification and loss of support within the bargaining unit. Review the decertification election process on page 274 and discuss.*



Slide 112. Instructions: *Divide the participants into groups of two or three. Ask them to turn to page 275 and read the case study, then answer the questions. Provide these instructions **before** sending participants to the appropriate number of breakout rooms. Make sure participants appoint one group member to take notes and one person to report back.*

Give participants 10-15 minutes in breakout rooms, saving time to debrief as a big group.



Slide 113. *Ask groups to report back on their conversations for each question before clicking to reveal additional possible answers.*

1. Identify three things in the case study which weakened the union presence
 - a) TEMCO was a small unit in the local
 - b) No members from the unit were on the bargaining committee
 - c) Little or no communication between the local and the unit

2. What specific union structures and programs could have prevented this situation?
- a) An effective steward structure in the TEMCO unit
 - b) Representation from TEMCO on the Executive Board
 - c) TEMCO union activists working with or on the bargaining committee
 - d) A mobilization coordinator and committee in the TEMCO plant
 - e) Union visibility and communications newsletter, worksite meetings, and handouts

Ask participants to turn to page 276 and read over the Do’s and Don’ts.

Before the discussion on how to organize, it is important to frame the current situation facing unions. Refer back to your CWA Strong discussion in CH 2 and re-emphasize that CWA Strong locals prevent decertification campaigns before they gain strength.

Members’ Relief Fund (15 min)



Slide 114. *Ask participants to turn to page 279. Explain that the 1990 CWA Convention established the Member’s Relief Fund. Explain that the Members’ Relief Fund is maintained by ¼ hour of basic wages per month from members and agency fee payers who are **eligible to strike**.*

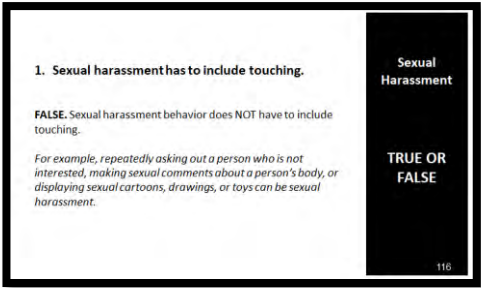
Have participants read aloud through each of the Frequently Asked Questions (FAQs) on pages 283-285. Let participants know that “A Local Officer’s Guide to the CWA Members Relief Fund is available from the Secretary-Treasurer’s office.

Sexual Harassment (45 min)

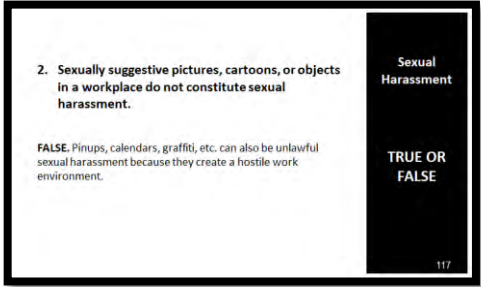


Slide 115. *It is critical that the next section get covered during new local officer training. Ask participants to turn in their resource manual to page 289.*

Break up participants into breakout rooms of 4 people. Give each group 15 minutes to read through the chapter, before coming back together for a group-wide true/false exercise.



Slide 116. *Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.*



Slide 117. *Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.*

3. Sexual harassment is considered a form of discrimination protected by Title VII.

TRUE. Sexual harassment is considered discrimination on the basis of sex and is covered under Title VII. Title VII gives employees the right to work in an environment free from intimidation, insult, or ridicule based on race, sex, religion, or national origin.

Sexual Harassment

TRUE OR FALSE

118

Slide 118. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

Also add: Sexual harassment that creates a hostile or offensive work environment for a work is every bit the arbitrary barrier to sexual equality in the workplace that racial harassment is to racial equality.

4. A grievance cannot be filed on sexual harassment.

FALSE. A grievance can be filed. Often these grievances cite the anti-discrimination clause in the contract but other contract language may also be appropriate.

Sexual Harassment

TRUE OR FALSE

119

Slide 119. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

Also add: Be aware that employers may argue that a grievance regarding sexual harassment (and other Title VII claims) encompasses all of the employee’s right to adjudicate these types of claims, thus rendering them all subject to the CBA’s mandatory arbitration clause (except for claims filed by the EEOC). This is not a high risk given the language of most of our contracts but it is something to be aware of. Therefore, it may be helpful to consult with CWA counsel when writing such a grievance to ensure that you do not inadvertently waive the employee’s right to sue under Title VII (or other statutes) in court.

5. An employer can be held responsible if a customer or contractor or other non-employee sexually harasses an employee.

TRUE. An employer can be held responsible for sexual harassment by third parties who are frequently in the workplace. For example, the copier repair person, courier service, etc. Again the employer is responsible for providing a hostile-free environment and taking corrective action.

Sexual Harassment

TRUE OR FALSE

120

Slide 120. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

INSTRUCTOR’S MANUAL: LOCAL OFFICER TRAINING

6. The laws on sexual discrimination and harassment protect men, as well as women.

TRUE.

Sexual Harassment

TRUE OR FALSE

121

Slide 121. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

7. The organization/corporation can be held liable for the actions of individual supervisors or employees with regard to sexual harassment.

TRUE. The most potentially damaging cases of sexual harassment for employers involve unwelcome sexual advances by a supervisor or manager (quid pro quo). The employer will be held liable for a supervisor's action, even if other members of management did not know about the harassment.

Sexual Harassment

TRUE OR FALSE

122

Slide 122. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

Also add: Unwelcome sexual conduct by fellow employees creates a hostile environment. Employers can be held liable for this type of sexual harassment also.

8. Only a manager or supervisor can sexually harass an employee.

FALSE. Co-workers can sexually harass a fellow employee.

Sexual Harassment

TRUE OR FALSE

123

Slide 123. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

9. A male co-worker repeatedly asks a female co-worker to go out for a drink, despite the fact that she always says she does not want to go. This is not sexual harassment.

FALSE. It is sexual harassment if it is done repeatedly over a period of time and the person expresses that such conduct is unwelcome.

Sexual Harassment

TRUE OR FALSE

124

Slide 124. Read the question on the screen. Give a few groups the chance to guess before revealing and reading the answer out loud.

Also refer participants to the CWA Policy on Mutual Respect which can be found at the end of Chapter 10.

The Union Operating Procedures Manual (15 min)



Slide 125. *Make sure to flag for participants the chapter on the Union Operating Procedures Manual and the types of resources available to them (local office operations, charters, bylaws, federal reports, etc). Let folks know that the UOPM is available online at www.cwa-union.org/uopm and that all the topics covered are also listed in their resource manuals on page 299.*

District/Sector/Division Structure (30 min)

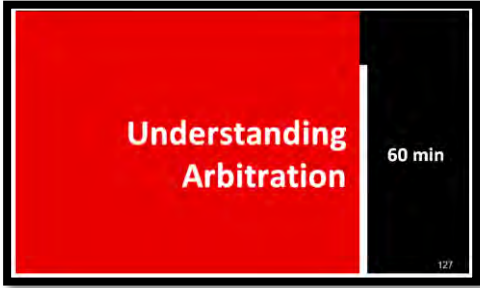


Slide 126. *There are several topics in the training where the information might vary by District, Sector or Division. The first step is familiarizing local officers with the structure of your District/Sector/Division.*

This is a good opportunity to review the structure of your District/Division/Sector with officers. Who is the VP/President? Who should they contact for help? What types of resources are available?

This might require advance preparation if you wish to invite other people from your District/Sector/Division to come address the group and introduce themselves.

Understanding Arbitration (60 min)



Slide 127. *You should cover grievances and arbitrations during the section on District/Sector/Division specific information. Review the District review process and any special forms required.*

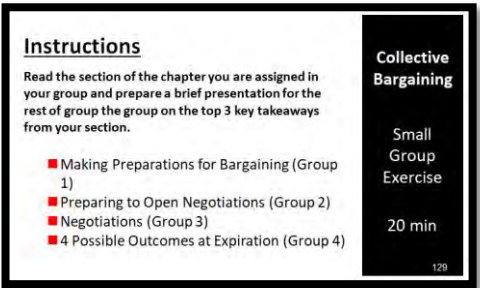
Suggestion: *Invite one of the CWA District attorneys to make a presentation to the group.*

Collective Bargaining (45 min)



Slide 128. *The Collective Bargaining chapter starts on page 135 in their Local Officer Resource Manuals.*

Begin this section by having participants take turns reading aloud on pages 135-136 about Collective Bargaining and the legal context for collective bargaining.



Slide 129. *Now we’re going to do an exercise to better understand all the different parts of the bargaining process. In a minute I’m going to send you to breakout rooms so take note of what’s on the slide or take a screen shot.*

Please read the section of the chapter assigned to your group and identify the top 3 key takeaways you think the rest of the group who didn’t read that section should know. Be prepared to report back.

Send participants to breakout rooms for 15 minutes before giving each group the chance to present on their section to the big group.

Legislative/Political Program (45 min)



Slide 130. *See Chapter 12 on page 119. Considering inviting one of the Legislative/Political organizers or Action Team members in your District/Sector/Division to come and address officers about political and legislative priorities and ways they can promote building the political power*

of locals and CWA at large.

Make sure to highlight LPAT Structure (p. 120), CWA PAF and Local Union Fund Do’s and Don’ts (p. 125-126).

Close by taking 10 minutes to do the exercise on page 129 on responding to objections about PAF as a big group or in pairs, depending on time.



**CWA National
Education Department
2020**

COMMUNICATIONS WORKERS OF AMERICA

**501 3RD ST NW, WASHINGTON, DC 20001
WWW.CWA-UNION.ORG**