

February 2009

CAS

# The CAS CONNECTION

SPECIAL  
EDITION

NSO Winter Advocacy  
Retreat 2009

## EXTRAS

- If you are interested in any of the trainings listed in these reports, please contact the CAS Representative for copies. Many of us brought back materials or had them emailed to us.
- A slideshow of pictures from WAR College can be found

[\*\*HERE.\*\*](#)

## Dawn Basurto - President

In January, 18 of your CAS colleagues attended the NSO WAR College in Anaheim. It was great to see such enthusiasm from everyone in the group, we have a great group of new individuals who have volunteered to be active in the union, it was a pleasure to get to know all of them and I thank each and every one of you for all that you do for CAS. I attended

the New President's training; it was great to speak with other colleagues from around the state who are dealing with some of the same issues. From this training it was decided that the information that we all shared would benefit others so NSO will be putting together a New President's handbook and it will begin with the ideas and practical tips that we

all learned. I was also taken by surprise that I was going to be a trainer, I trained Navigating through NSO Research, it was a great opportunity and I enjoyed the experience. The last session that I took was the Defined Benefit Retirement Plan. The information provided was very useful.

## Terri Pinkney - Treasurer / Bargaining

On Friday and Saturday, January 16-17, 2009 I attended the NSO Winter Advocacy Retreat in LA. There were so many fantastic training session choices offered that I felt I needed one more day of training because there wasn't enough time to fit in everything that I wanted & needed to learn! I did get to attend a most helpful and informative session for treasurers that will be of great use in my role as the CAS treasurer. I also gained valuable knowledge and received resources that I will share with CAS members at the upcoming General Membership meeting about workplace privacy and protection on employer

provided equipment. Several CAS members and I attended a session about salary schedule design and calculating the cost that will enhance our knowledge for bargaining this year.

We are members of NSO (National Staff Organization) who provides this annual training and I have to tell you how impressive and comforting it is to know that we have this resource. I learned that NSO offers assistance, free of charge, to CAS for arbitrations, some legal matters, treasurer advice

and help, reimbursement for certain expenses and many other services. The training provided the valuable opportunity for union members across the country to network and share experiences, information and resources with each other. Eighteen CAS members attended the training this year, and we are very fortunate to have so many bright, gifted, eager and truly beautiful people willing to donate their talent and time to improve our lives. I feel blessed to be a part of the CAS organization.



## Sharyl Benitez - Secretary

This was the second NSO Winter Advocacy Retreat that I had the honor to attend. I attended the general session on Friday morning where Mel Myler presented "To be a Seed or a Stone in Challenging Times." Over the course of WAR College, I was able to attend three workshops: Back to the Future, which focused on union history in

the U.S.; Getting Your Members Involved in Your Union; and Leadership & Power. All three workshops were relevant and informative.

Between the rigorous learning, we were able to relax some and get to know each other a little better by

spending "free time" and most meals together. Though the academics provided were impressive, I believe that the time spent building relationships with CAS Officers and Committee members was as important and productive as attending the very useful workshops. I am grateful for both, the knowledge and the delightful memories.

## Debra Oshige - Area 2 Director / Bargaining

I was privileged to attend this year's 2009 National Staff Organization Winter Advocacy Retreat in Garden Grove, California. I selected sessions that would be beneficial to me as the CAS Bargaining Chair and was joined by our entire CAS bargaining team. Together we covered a wide range of classes designed to sharpen our advocacy skills and prepare us for this year's contract negotiations with CTA which will begin March 16<sup>th</sup>.

"I wish it were a three-day training instead of two – there were so many classes I wanted to take!" This was a common sentiment of many CAS attendees including me. I attended two sessions related to retirement and health care bargaining. 'Bargaining Health Care Benefits' was a great overview of current trends and cost statistics and covered the basics of bargaining managed health plans, prescription coverage, disability and dental insurance. The other class, 'Defined Benefit Retirement Plans' focused

on the basic elements of a sound defined benefit retirement plan and covered funding requirements, post retirement benefits, vesting, and the cost of adequately funding a DB plan. I also took a session called 'Quality Bargaining – Watch Your Language' which covered strategies for bargaining quality language into your contract; and 'Keeping the Wolves At Bay: Organizing to Neutralize' which explored organizing and bargaining strategies to neutralize the negative impact of the increasing trend of some governance to interfere with the work of staff unions and misuse legitimate power. Effective strategies by staff include enforcing the staff contract and existing policies, to not accept bad behavior, and to promote staff solidarity. Although I found this last session to be interesting, it pertained more to field staff who work closely with association leaders.

I enjoyed the NSO Solidarity Reception on Friday night and seeing

my NSO friends and colleagues from around the country. It's a wonderful networking opportunity to meet new people, ask questions and share concerns and common experiences. The NSO Winter Advocacy Retreat is an outstanding training with the goal of 'Growing Advocates for our Future', the theme of this year's retreat.

Lastly, I was inspired by the many new CAS faces that attended this year. We are fortunate to have so many new emerging leaders who are eager to learn about union advocacy and willing to give their time and talent to CAS and help us build our union's collective strength. These two days were filled with learning, networking and building new relationships with fellow unionists. I am thankful for the opportunity to attend and learn new things.




---

## Vicki Kramer - Area 4 Director / Grievance Co-Chair

---

This was my third opportunity to attend the NSO WAR College. It's always a great experience. As CAS Grievance Co-chair, I attended a session that covered processing grievances. I've attended grievance trainings before but you can never learn enough. I find it most interesting to hear participant from other states explain their grievance process, the situations they've had to deal with in protecting members' rights and contract language, and techniques employed in dealing with management. I'm always proud that our CAS contract, compared to other states, is very strong. Attending trainings, like this one, help me and other CAS leaders to keep it that way.

## Rhonda King - Area 3 Director / Bargaining

---

This year, I was one of eighteen CAS members fortunate enough to participate in the training provided at the National Staff Organization's Winter Advocacy Retreat in Garden Grove, California. As Area 3 Director and a Bargaining Team member, I took advantage of sessions related to bargaining and spent spare time networking with colleagues on union advocacy issues.

My Friday sessions included *Bargaining Health Insurance* and *Keeping the Wolves at Bay: Organizing to Neutralize*. Both sessions were good but Saturday's sessions, *Quality Bargaining— Watch Your Language* and *Salary Guide 101* will be extremely beneficial when writing bargaining proposals and planning strategies at the bargaining table. The trainers

provided a huge stack of useful information in the 2½ hour *Salary Guide 101* session which I wish had been a full day.

Overall, you can't find better trainers than those provided through NSO. WAR was a great time to learn, reflect and network. The time spent networking reinforced that CAS is a strong union with a great contract.

## Susan Harper - Communications Chair

---

I was very honored and eager to be a participant in WAR College this year and to learn of ways that could make CAS stronger and our means of communicating with each other more efficient.


I was very impressed with a training called Leadership and Power which discussed the different ways that we can interpret power and its origin in specific environments. The session that I had anticipated the most, Effective Communications proved just how advanced CAS is technically, and I was pleased to see we are ahead of the game.

After this experience, I realize that the biggest benefit of my attendance came from the overwhelming realization of how much work the prior stewards of CAS completed and how much more work we will need to KEEP our union healthy and vibrant. I came away from the experience engaged and excited to be an active member for CAS.

## Dede Deatrck - Bargaining

---

I was thrilled for the opportunity to attend the NSO Winter Advocacy Retreat and network with our NSO colleagues. As a CAS Bargaining Team Member, I attended sessions relating to the bargaining process. I learned basics in the Grievance/ Arbitration process, current trends in health benefits and maintenance there of, how vital precise language in a contract can be, and how body language can be used as a tool in successful communications with others.



## Laura Eastridge Murphy - Area 5 Dir / Bargaining

At this year's 2009 National Staff Organization WAR College, I participated in the following sessions:

**Bargaining Health Care Benefits** reinforced the fact that we have an excellent health plan and that CAS and our CSO brothers and sisters need to let management know that CTA should continue providing the highest standards for employee health coverage. This session was a great overview of current trends and cost statistics and covered the basics of bargaining managed health plans, prescription coverage, disability and dental insurance.

**Rankism in the Workplace** was a very informative and collaborative program about how abuses of rank impede our work life and counteract the type of social justice that most of our organizations work toward. This training provided many creative solutions for improving conflict in the workplace. The other participants from NSO affiliates all over the country also provided some great input for dealing with difficulties in this area.

**Aiding Members in a Crisis** was presented by wonderful trainers with personal experience helping members in a variety of crisis situations. The trainers used sample case histories to explain ways to advocate for members in distress. Additionally, they explained how the FMLA and ADA laws work and how they can be utilized to assist members and to mitigate discipline.

I am thankful for the opportunity to attend my 3<sup>rd</sup> WAR College and spend time bonding with colleagues from our CAS family and from our more-extended NSO family, gaining insight and learning about some of the challenges we face and learning that we are more alike than different.



## Shauna Taylor - Organizing

The sessions presented to the NSO affiliates were top notch. The level of experience from both Staff and Associate ranks delivered a well balanced mix of experience. What really resonated with me is that we are in time of both political change and shifting membership demographics. The importance of union advocacy, an engaged membership, and personal

ownership of our union requires involvement; an investment in our current and future endeavors.

Ultimately it's the realization that we all need to be stewards of our union. Protecting our "earned & negotiated benefits" within our contract requires participation, enforcement of the contract, and rising above our struggles with bravery and

collaboration so that we may all prosper.

It was both a pleasure and honor to form new/existing relationships with some pretty terrific people within CAS. I've been enriched both professionally and personally.

## BoMee Rutte - Area 2 Rep / Grievance

I received the opportunity to attend my first NSO war college this past mid-January. There were various trainings and workshops on all sorts of topics ranging from bargaining, salary analysis, grievance, and other member driven focuses. It was all very exciting and I walked away from the experience with a real sense of the bigger picture. We aren't alone in our union by any means. We have other fellow sister and brother unions all over the United States in a far worse situation than us.

I think the moment I knew our union was something special was when

other fellow unions wanted to glance at our union contract as an example for their association or local. I feel so lucky to be in our union with all of the working rights that we currently possess.

I also learned that individually we are still a collective whole. There was a great motivational presentation that kicked off the event given by Retired Executive Director and former NEA Director, Mel Myler. What I took away from his presentation was the urgent need for us to step up and accept challenge, and recognize the power that we each

have in order to make our union stronger. His mantra is "To be a seed or a stone in challenging times".

A seed is an individual who ambitiously willing to offer insights about future ideas. A stone is an individual who remains steadfast to the values of the past. We have many seeds and stones in our union and I feel excited to collaborate together to make our union stronger especially in this year ahead when will we need it the most. Let's honor our core values, uphold our code of conduct and maintain our current benefits and rights.

## Mia Anastasio - Bargaining / Grievance

The National Staff Organization Winter Advocacy Retreat was a great opportunity to both learn and make connections.

As a new bargaining team member, I attended several classes to help develop skills for the table. My first session was *The Basics of Labor Law Under the National Labor Relations Act*. This session detailed the law that governs CAS – this information was particularly helpful in relation to the bargaining process. My following

session, *Rankism in the Workplace*, provided a good forum for discussion about rankism at work, which seems particularly applicable to CAS. However, it provided more solutions for individual situations of rankism rather than institution-wide. *Quality Bargaining – Watch Your Language* was a great session that helped me as a new bargaining team member by acting out bargaining scenarios and discussing bargaining language dangers. Finally, *Salary Guide 101*, provided a great deal of information on

salary schedule structure and comparisons.

I found the whole experience very valuable for building relationships with CAS members and with other unions across the country. But most of all, I am thankful for being able to take advantage of some of the great resources provided by NSO. It helped me become a better advocate and a better union member.



## Bob Quance - Area 5 Rep / Barg / Retirement Trust

At war, I attended sessions on 401(k) plans that left me very appreciative of our retirement benefits at CTA. One sobering conclusion that a trainer shared with us from a study he'd seen recently: people that retired in 2007 with a 401(k) as their primary source of retirement income only had enough funds available to pay their anticipated expenses at their current standard of living for approximately 10 years. When I retire, I hope to be kicking around for much more than 10 years! Even if you develop a serious drug habit and only eat food that's wrapped in bacon, if you're living off a 401(k) plus social security, it's easy to see that you might spend every penny in your 401(k) and need to survive for a number of years exclusively off of a hugely decreased income (social security). The ideal situation is to have a pension like we have at CTA that provides a defined benefit (3% of your highest monthly salary times your years of service) in addition to a 401(k). In that scenario, the 401(k) serves as a COLA or supplement to your pension. Our pension plan is well worth protecting!

Another topic that was covered in the 401(k) sessions is the importance of transparency in how Trusts operate. We were advised to adopt a policy of open meetings, so anyone that is a participant in the Trust is welcome at any meeting. The meetings can be dry, but if you would ever like to attend one, I think you should have the right to do so. I'm not sure whether or not the 401(k) and Retirement Trust operate with an open meeting policy, but I'd like to discuss that at the next meeting for each of those groups. I'd also like to see the meeting minutes sent out via email after each meeting, so hopefully that practice will begin soon.

The trainer for the salary guide session mentioned that it is a best practice to have to have a very compact salary schedule, with 3 classifications (A-C) or fewer. I don't think we'll go from 7 classifications to 3 in a hurry, but it's a topic worthy of discussion. If you have any thoughts about this, please let me know or contact someone from the bargaining team. Please be gentle, I'm not expressing a statement of bargaining policy, just floating something out for your consideration...

I'd like to thank Greg Gee and Jeff Hugo for taking care of things in TechSupport while I've been out for CAS meetings and bargaining prep. Many thanks as well to the members of the CAS Bargaining Team, Rep Council, and the Retirement Trust for their support and everything they've taught me this year.



The 2009 Winter Advocacy Training was absolutely great. My first session on Friday was on the History of Labor. I am a visual learner and the session was basically a verbal tale on the Union History & Advocacy. It was interesting but rather lack luster because my perception of the history of the labor movement is that it is so very colorful I feel it should be part of U.S. History in school and college because of the significant involvement of the various groups of immigrants and workers to improve working conditions in our country. I think people need to know how the Labor Movement began and why it is so important today. Things change and at the same time, they remain the same. The basic fight has always been between the Workers and the Company and it is still the same today. I think the presentation put together by our on Dan Koen for which I have a copy on my desktop has a lot more valuable details and information.

At noon I attended a newcomers' luncheon with a former NEA Board Member, Mel Myler who began a discussion on the future of education. The handout entitled "To Be a Seed or A Stone in Challenging Times." What does education/educators look like today? What is the impact of NCLB, technology and a myriad of other influences? Mr. Myles provided handouts on Information Age v. Industrial Age and certainly stirred up a discussion amongst the few people who attended the session. Mr. Myler has written "It s time for the transformation of public education." I enjoyed the dialogue and would like the speaker to bring his discussion to California. It is seriously time to change how we do business and I agree we need to all become catalysts for change.

The afternoon session: Arbitration -- It is Not Rocket Science on the other hand was fantastic. A husband/wife team Don and Lois Tarr from New Jersey shared the particulars of How to Handle An Arbitration from inception to presentation. Framing the Issue (practical example of how to....) The Opening Statement/Direct Examination/Cross Examination of witnesses/ preparing witnesses in depth details on how to and preparation in a pre-arbitration i.e., things to consider before going to Arbitration. Is there an alternative remedy, is the issue actually arbitral? what are the merits of the case? Are there political considerations? What is the motive for moving the issue to arbitration in the first place? I loved this session, we interacted with each other and the questions and answers were both useful and practical.

We covered preparation of an Arbitration Hearing; Closing Statements in Arbitration and read and heard stories of actual Arbitrations that were unbelievable. I highly recommend this session and this year the only important tool missing was a simulation so we could actually walk through an Arbitration. I look forward to continuing my studies in this arena. The session was 12:30- 3:00 p.m. but it could have been an all weekend workshop. It was very good.

On Saturday morning right after breakfast with new friends from Ohio Education Association. I headed to *10 Tips for Building a Strong Union* with trainer Mary Ann Jandoli. Hey, I am on the organizing team and wanted to know useful tips. One of the listed trainers was not able to co-present and had the trainer not made many references to the absent trainer we could have enjoyed her part of the presentation. It was interesting from a research perspective. Lots of handouts including the PowerPoint she did not present because of having to bring her own large LCD projector to California. Members of the audience were invited to share useful organizing tools with each other via a website that we are all invited to sign on to. I have not heard from them as of this day but look forward to sharing about the CAS bulletin board which we used to get members actively involved in our local offices. The trainer used lists of 10 best of worse things about different topics to get the audience involved. It was a good method of getting interaction from the captive audience. To me one of the best tools was the survey which she believed needed to be administered in person to get an honest opinion and to show the sincerity of the request for information and how to get members involved in their union. What is your impression of our union? What strategies can we employ to get new member involvement? I am an old member of CAS and these questions always excite me because being involved in our respective offices voicing our opinions and being part of CAS is just part of being active members. Perhaps we will use one of the tools to get the opinion of our membership to get more participation.

The Saturday afternoon session was entitled Can Your Employer Pass the Tests for Just Cause? We were given seven cases a week before the session to read and prepare for the training. I noticed that some of the people who signed up opted not to show up for the actual class. The session was actually very interesting. Our trainer was very well informed and provided insightful information on the Seven Steps of Just Cause. In the cases we were given we needed to read and determine if the employers had met the seven steps in their cases against the workers. The actual case summaries ranged from Trailways to Social Security Administration. We digested each situation and determined if the Seven Methods of Just Cause had been utilized.

The 2009 Winter Advocacy Retreat offered many useful training topics and unfortunately we had to choose workshops to attend. It was a great opportunity and I am very grateful for the opportunity to go and gain useful information that I know will assist my tenure as an active member of the California Associate staff union. There is so much to learn about being a good advocate and the Winter Advocacy Retreat was a good tool to facilitate the process.