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STEWARDS UPDATE

The Power of Good Note-Taking



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You don't have to be a cook to know how critical it is that a recipe list all the ingredients, make clear how much of each you need, and detail the temperature you need to set the oven. Without these instructions you're likely to end up with an undigestible mess on your hands.

So it is with taking notes. Your notes are your ingredients for the completion of any number of steward tasks, and if you can't make sense of your notes, or they're incomplete, you're sure to give yourself indigestion—if not worse.

The notes you take are an essential way to capture key points of a conversation with a member or to begin investigating a potential contract violation. Stewards' notes can function as "to do" lists noting what follow-up is required or can keep you on track for a grievance presentation with management. Good note-taking helps a steward to be more organized. But should you scribble down everything that's said? How many notes are too many notes? Are there best ways to take quality notes?

Why Take Notes at All?

Notes should be taken for two reasons:

- to help you recall important thoughts or points from a conversation or exchange
- to create a record of an event

If you will be following up to get more details for a grievance investigation, notes can keep you on track. What do you need to do next? With whom do you need to speak? With this type of note keeping

there is no need for formality—keep them short and to the point, just a simple road map of where the investigation is leading is fine. Once the matter is settled, there is

no need to keep these notes, as they were your personal notes to guide your investigation.

Other types of notes are more formal, for example to record an agreement or to note key events of a meeting. When recording an event, simple facts should be written down in case they are needed at a later date:

- What occurred?
- Date, time and location of event
- Who was witness to the event?

Both types of notes have one purpose: to

help stewards recall something they need to remember to properly do their job and support their members.

How Many Notes Are Too Many?

Many stewards start meetings with members by grabbing a pen and pad of paper and scribbling notes with pen blazing. Instead, imagine what could happen by focusing on listening to what the member has to say, then capturing the most important points in note form. The result will likely be greater attention paid to the issue at hand, and the opportunity to build a greater steward-member relationship. You'll have been more attentive to the member's concerns and be better able to figure out what the real issues are, rather than wasting time and paper on keeping a record of mostly useless conversation.

Don't Let Taking Notes Get in the Way

Imagine you are a member asking a steward for help for the first time. As you are explaining your concern to the steward, you notice that she isn't looking at you at all, but is simply focused on writing down what you say. How might that make you feel? Might you begin to be self-conscious about your words? Might you wonder if she is really hearing what you're saying? Would you feel like you were connecting with the union rep? Failure to make eye contact with the member can send the unintended message, "You are not important, I'm only interested in your words." As steward you can build trust and rapport if you:

- Look up as you take notes to make eye contact with the speaker.
- Nod your head slightly once in a while to show that you are listening.
- Make notes of the most important facts while the member speaks, later adding your personal notes of actions needed.

By following these simple tips you will better communicate your interest in the member while getting the notes you'll need in order to help.

What is the Best Way to Take Quality Notes?

Good note-taking starts with good listening, by focusing on what is being said, who is saying it, tone of voice and non-verbal messaging. A union representative may miss many of these if his or her head remains buried in a notepad. Asking relevant, probing questions will help clarify the who, what, when, where, how, and why of the issues.

Using these skills will help you build trust with the speaker, be it a line supervisor or a disgruntled member. It puts you and them at ease. It also helps you to separate key points in the conversation from general information, allowing your notes to reflect the key issues you need to follow up on.

Well-taken notes that are to the point, focused on the main concerns and facts, will help you to be better organized, better prepared and better able to assist members. Quality over quantity is the key.

—Patrick Domaratz. The writer is a veteran labor educator.



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"Troublemakers"

One of a steward's most important jobs is to sign up new members, or just get uninvolved members more enthused about and active in the union in general. It's during this process that the following refrain is most likely to be heard:

"Why is it that the union only seems to look out for the members who are troublemakers?"

It's a good question, for many reasons. How would you respond to it?

Here are some suggestions from veteran union activists:

- Explain that all of the terms and conditions of the contract—wages, benefits, language—*apply to all members all the time*, not just when an individual member has a "case." If you have a history of the union that shows the various improvements won in each negotiation, show it to the critic. Another good tool is a comparison sheet contrasting your wages with non-union wages in your industry, or in your geographic area.
- Every *member*, not just the troublemaker, is protected by the contract. Forget about the troublemaker this week, you can say, and think about next week, when *you* might want to bid on a job, use seniority preference for a shift change, or avoid a health hazard. The union is there with *you*.
- Every *member*, not just the troublemaker, will benefit from future improvements negotiated by the union, on everything from wages to insurance to health and safety improvements and holidays.
- Every *member* is helped by the political action of the labor movement. Remember that unions are the largest single organized group of people in the country, and as such have a lot of power. A huge number of our most basic laws—including workers comp, Social Security, OSHA, civil rights, even minimum wage and overtime—exist because unions led the fight for *all* workers, union or not.
- Every time the union organizes a new worker, *everyone* in the union is made stronger—not just the troublemakers.

More organized, decently-treated workers make it harder for employers to resist union demands in negotiations.

■ There are a lot of "do good" activities that the union supports for the benefit of everyone. Unions routinely get behind charitable causes and fund raisers to assist their communities. They constantly help out in local emergencies. These activities and others make our communities a better place to live, just as the union makes the workplace a better place to work for everyone—not just the "troublemaker."

■ Remember that, right or wrong, *you* may be considered a "troublemaker" some day and need protection and representation. Usually this charge is made by bosses—and you know how unfair and unreliable they can be.

■ Working under a union contract with its job security protection is like carrying fire insurance on your house—you hope you never need it but you're glad to have it. And you'd be in big trouble if it wasn't there when you *did* need it.

■ Without the union, you wouldn't even be *having* this discussion: No one would

be protected and you all would be at the tender mercy of your employer.

■ And, yes, the union does protect "troublemakers." The union guarantees that they, like everyone else, can only be disciplined for just cause and that they get counseling or outside help or whatever is needed to keep them on the job.

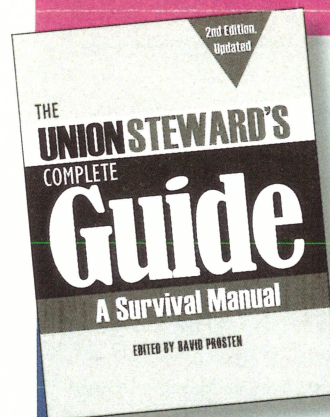
When responding to the charge that "the union's just for troublemakers," it's helpful to make your answers as specific as possible and to focus the complainer on your particular workplace. You can also expound on a grander view of unionism: that it gives every worker a voice, so you can stand up to the employer without complete fear of retaliation.

You can also describe the positive mental process that arises from challenging management decisions, rather than simply obeying.

And finally, as one UAW veteran remarked: "A chain is only as strong as its weakest link. You protect one, you protect all."

—Bill Barry. The writer recently retired as director of labor studies at Dundalk (Md.) Community College.

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10 Rookie Mistakes

Did everything go absolutely perfectly the first time you ever drove a car? Unlikely. How about your very first day on your very first job: probably not flaw-free. Or how about your very first date? Every move you made, every word out of your mouth was nothing but cool and sophisticated, right?

Probably not. Very few things in life go perfectly the first time around. Rookies make rookie mistakes. It's the rare person who can try something new for the first time and be perfect at it, and that holds true for new union stewards. Just like your first date or your first time driving a car, you're determined to be "perfect" but the odds are against you.

Still, as for a rookie driver, there are some basic rules of the road for the new steward who wants to do whatever possible to avoid costly mistakes. In no particular order, here are a dozen rookie mistakes to avoid.

1 Don't Be Afraid. It's natural to be concerned that you won't do the job right: There's a lot to learn and you may not yet be comfortable being in a position where you deal with management from a position of authority. Keep in mind that millions of other stewards have gone through the same thing, and no one expects you to be Supersteward. If you approach it honestly and consult with other stewards and union officers when you're not sure how to handle something, you'll do just fine.

2 Don't Be Shy About It. You don't want to get on a bullhorn and brag about your new role as steward, but you don't want to keep mum about it either. You can't be an effective steward unless the co-workers you serve, and the management people you'll have to deal with on a day-to-day basis, know who and what you are and how to find you if they need you.

3 Don't Shoot from the Hip. Just because you're a steward doesn't mean you know everything. If a question comes

up that you can't answer, don't try: Say you'll find the answer and get back to the person. There's no such thing as a steward smart pill. It will take you a while to get familiar with the union contract and with the labor laws that affect your workplace. All it takes on a steward's part is to give a few wrong answers before everyone avoids him or her altogether and seeks out a more knowledgeable union official.

4 Don't Play Favorites. It can be a big temptation to focus your energies on your friends and immediate co-workers. Big mistake. Just one reason it's a big mistake is that, *by law*, the union—and that includes the steward—must provide equal representation to every worker. It makes no difference whether you like the worker or hate him; whether she's the strongest union member around or the biggest union-hater; whether he's your ex-spouse or your current lover. You have to let all the workers you're responsible for know that you're there for them.

5 Don't Ignore the New Hires. It's a steward's job to greet every new worker who comes on the job, to welcome the worker and explain the steward's role. Just because you made the rounds when you became steward and made sure everyone knew about it doesn't mean that the person who starts work today knows you.

6 Don't Let Management Run over You. Some supervisors or managers get a thrill out of trying to make a new steward feel uncomfortable, unknowledgeable, and unwelcome. You don't have to take it. By law—by law—the steward is the *equal* of management when conducting union business. Remember, if you're not sure of how to handle a problem, call in a veteran steward or seek help from a union officer, but don't allow management to treat you poorly.

7 Don't Confuse Your Union Role with Your Employee Role. While

as a steward you are equal with management when doing union business, when you're not conducting union business you have to follow the same rules and requirements that apply to everyone else. Just because you're the steward doesn't mean you can wander off and take a nap.

8 Don't Think You Should Do It All Yourself. Depending on the workplace, rookie stewards can feel overwhelmed by their responsibilities. An important thing to remember is that the most effective stewards are those who get their co-workers involved in the union's work. Your job isn't to make everyone's life better, your job is to work with your co-workers toward that goal. You might even think of yourself as an organizer more than a steward, because you should organize the people around you to help move the union forward.

9 Don't Forget to Have a System. Every steward needs to have some kind of system to keep track of paperwork: Throwing stuff into a car trunk or work locker might be good for a few days or weeks, but you'll soon find that you need a filing system of some sort to keep track of everything. Talk to other stewards about how they do it. It will make your life a lot easier.

10 Don't Beat Yourself Up. As a rookie you're likely to mess up on occasion. Every rookie does. Just do the best you can, and seek out help from the union when you think you're in over your head. If you make a mistake, deal with it as soon as you can before it gets worse and then look ahead. Remember that you're doing an important job for your co-workers, one that a lot of people probably don't have the guts, energy and dedication to take on. Don't get mad at yourself, be proud of yourself for caring enough to accept the responsibility.

—David Prosten. The writer is co-editor of *Steward Update* and founder of *Union Communication Services (UCS)*.

Dealing with On-the-Job Disability Issues

No one likes to be reminded that we are all just a misplaced step, a spilled chemical or a bad lift away from disability.

Accidents or chronic problems happen to the other guy. Workers who are pushing themselves too hard say, "I'll rest on my day off." Workers with ongoing issues hide them from themselves and others. Most unions don't want to tackle disability issues, either. But a worker who becomes disabled on the job is a warning to the rest of us.

So, more than almost any other issue, disability is something the union should plan ahead for. Disability should be a topic of general discussion, a focus for steward trainings, and an issue negotiated at the bargaining table. The attitude of the union should be: "This could happen to any of us at any moment: let's be prepared to deal with it."

This could happen to any of us at any moment.

A Tangle of U.S. Laws

One reason why unions may be reluctant to deal with disability issues is because of the tangle of laws that may apply.

The overarching law in the United States is the 1990 Americans with Disabilities Act, or ADA. Some states have their own version of the ADA. The core of the ADA is that if workers can perform the essential functions of the job, with or without reasonable accommodation, they have a right to be protected against discrimination. "Reasonable accommodation" is defined as that accommodation which allows a worker to perform essential functions of the job without undue hardship for the employer.

A disability issue may be a grievance under the collective bargaining agreement, a violation of the Rehabilitation

Act of 1973 (which applies to workplaces receiving federal money), a workers' comp issue, or a discrimination complaint filed with the Equal Employment Opportunity Commission (EEOC). What procedure takes precedence over others is currently a matter of active litigation.

Little Protection in Canada

In Canada, although pressure has been building to create a law comparable to the ADA, there is currently only the Employment Equity Act (EEA) of 1986, revised in 1995, which covers federally regulated workplaces. There are also no separate provincial laws. Most employers are therefore exempt. This is all the more reason for Canadian unions to be proactive in bargaining over disability.

Bargaining on Disability Issues

Many unions in the United States are fearful of invoking the ADA. They fear the law will take precedence over the existing collective bargaining agreement. They see disability as a divisive issue within the workforce because some workers may say putting a disabled worker back on the job will put other workers at risk. However, many contracts incorporate the ADA and other laws by reference, or else include disability in the nondiscrimination article.

Having disability in the contract is good politically because it makes clear to everyone that disability is a union issue, not just a matter of law and lawyers. It also opens up the possibility of enforcement through the grievance procedure, which in many cases is much more responsive to workers than either EEOC complaints or civil suits.

Disability issues can also be addressed in the contract by negotiating clear job descriptions that carefully name the essential functions of the job. This can result in better, safer work for everyone. The overall effect will be raising labor standards for everyone, as opposed to firing the disabled person and driving labor standards down. Also, there will be less ambiguity when a worker asks for reasonable accommodation so he or she can do those essential functions.

What Should a Steward Do?

Union members need to understand why, if they become disabled, they should go to the union first.

When the disabled worker contacts the union, the steward can help write the request for accommodation. If there is a grievance such as discrimination, you can use the tests of just cause, especially looking for evidence of unequal treatment. Make it clear how this is a union issue, not just one worker's problem.

Stewards will have to help the member work out the relationship between an ADA request for accommodation and/or a possible workers' comp claim. In using the ADA you want to demonstrate that your member can do the essential functions of the job if given reasonable accommodation, but under the workers' comp system the incentive is to maximize the severity of your member's disability so as to get the maximum compensation. This is not an easy contradiction to manage. The union, together with the union's workers' compensation attorney, needs to deal with this in trainings and in working with individual claims.

Disability issues overlap with health and safety issues. A workplace can be safe, but over the years, workers can become disabled simply through the way production is organized—a too fast or poorly designed assembly system, for example. What workers know about their work brings an essential perspective on how a job can be re-organized. Unions have been won over to dealing with health and safety issues, but are not yet easy with disability issues. The union can initiate this discussion—not as something to be afraid of, but as something to which everyone can contribute.

—Helena Worthen and Joe Berry. The writers are veteran labor educators.

Note to CSEA activists: the *Steward Update* publication often uses the term “steward” to refer to rank-and-file union representatives who perform representational duties that CSEA has assigned exclusively to activists who hold the appointed title of “grievance representative.” Please be aware that any material in the *Steward Update* that relates to the handling of contract grievances or the representation of employees in disciplinary settings is not to be applied by CSEA stewards.

Leadership: Traits of a steward

If we could buy leadership from a store or download an app to become that “super-leader,” we would. But leadership will never be sold. We find leadership traits within ourselves.

Developing and improving leadership traits contributes to your success as a steward and plays a major role in building and strengthening your activist network — the membership.

Your leadership skills become a representation of the true power of our union. Leadership traits include communication, time management and organizational skills, which are critical to a leader’s success. An acronym, “LEADRSHIP” (only one E), can help you define and evaluate the traits of a good leader:

Loyalty

Stewards are the backbone of our union. Our loyalty resides with members, officers and the union. Representing solidarity will define who we are.

Education

A steward is responsible for self-education and collective education. Self-education applies to you. What new information do you need?

Collective education applies to others. As a leader, ask yourself, “What knowledge do we need?” Knowledge is power, so stewards should share what they know with members.

Assistance

Be available to members and understand their issues. By being friendly and easy to talk to, you will better be able to help others.

Dedication

Do you spend hours helping others fix “problems?” Do you help organize members to support work site issues? Dedication can be defined in numerous ways; how you dedicate yourself depends on your time, your effort and your energy. Every action counts.

Respect

Respect can come in many forms; listen even when you disagree. Try to understand the diverse culture within our union and to appreciate opinions. Respect builds upon integrity, which develops trust.

Selfless duty

As a steward, you have probably spent many weekends and evenings away from home to serve members.

These sacrifices represent your selfless duty for the membership, the officers and the union.

Honesty

Being truthful to members is the best policy. Stewards should always seek and report the truth, no matter how uncomfortable.

Integrity

Have you ever been told, “I’ll get back to you,” only to never get a response? As a leader, your actions, or lack thereof, define who you are, as well as what the union is.

Personal courage

Challenges will come in many forms — management, the membership, and union leadership. As a steward, you will take a stand on many issues.

Developing and implementing your leadership style is an ongoing process. Your style of leadership, as a steward, is fine-tuned from experiences and knowledge gained. The nine leadership traits listed provide stewards a foundation to build upon.

**— Edward Herbert
CSEA Labor Education Specialist**

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