

## Audio Script

# Governance 300 - Reporting and Record-Keeping for Chief Stewards

This is the actual audio that was recorded for Governance 300. Use it for a reference or study guide.

### **Governance 300 - Reporting and Record-Keeping for Chief Stewards**

Welcome to Governance 300

This course should take you about one-half hour to complete.

This course is required along with Governance 100, 110, and 200 for Chief Stewards to receive their Certificate of Completion in the Governance track.

Be sure you have taken the two prerequisite courses - Governance 100 and 110 - before taking this course.

This course has one section that covers the reporting and record-keeping that is required of Chief Stewards.

#### **What is a Chief Steward?**

A Chief Steward is, by definition, the vice-president of their DLC. Their official title is Vice President/Chief Steward.

What are the requirements to become a Chief Steward?

To be elected to this office, you must be a certified steward in good standing or be appointed to fill a Chief Steward vacancy.

After you are elected, you must maintain your steward status by participating in at least 2 DLC activities per year and by taking Advanced Steward Training courses as well as continuing to perform the duties of the office.

#### **According to the Policy File**

The recording and reporting that is required according to the Policy File for Local 1000 is:

“Recording and reporting shall be a priority for all certified stewards. The reports from stewards on both formal and informal grievances and complaints shall be maintained by headquarters in such a way as to provide stewards with resource information, precedence, past practice and results and to provide our bargaining teams with information about experience factors on issues and provisions contained within the contracts, the DPA and SPB Laws and Rules and departmental policies.

“Stewards shall provide headquarters with timely written information when requested about informal and formal grievances and complaints, meet and confers, steward activities, appeals, expenses incurred and their contact information, level of experience and willingness to represent co-workers in the worksite.”

### **What does a Chief Steward do in their DLC?**

As described in the Policy File, a Chief Steward must do all of the following:

The Vice-President Chief Steward will serve as the president in the president's absence.

The Chief Steward is responsible for steward training in their DLC. Not only do they deliver or coordinate all of the Basic Steward Trainings, they must also certify all stewards who are trained in their DLC and keep track of those certifications for each steward. This applies to existing stewards as well as new stewards in their

**DLC.** A Chief Steward is recognized by the state of California as an agent of the union for the filing of ULPs in their DLC.

They report quarterly to the Local 1000 Vice President for Organizing and Representation on things like the implementation and status of representation projects and activities, and the training, status and certification of stewards.

Chief Stewards need to get grievance reports from all of the stewards in their DLC. They will then communicate any grievance settlements and other information from these reports to the senior stewards and the E-board. Senior stewards can use grievance reports for training worksite stewards and expanding the expertise of all stewards. Some of this information can also come from MRC reports.

The Chief Steward is a member of the DLC Executive Board and the Finance Committee, and gives reports at those meetings on the information mentioned earlier.

One of the most productive elements of being a Chief Steward is in the coordinating of all of the representation planning and events for their DLC.

Of course, the Chief Steward also does other duties as assigned by the DLC president.

Here are some ideas about how to do a good job coordinating from other successful Chief Stewards:

- Understand how the MRC and URC work and what they provide.
- Learn about the legal structure of Local 1000 and what your rights and protections are.
- Set up a worksite network of stewards. Meeting together regularly can instill a sense of community and support that will allow you to share ideas and solutions and make your lives easier.

- In these meetings, you can collaborate on team-building and problem-solving.
- These regular meetings will also be a good place to work with your fellow stewards on getting timely reports from them about grievances and other issues.
- Attend a Basic Steward Training once a year to stay current and meet the new stewards.
- Get a list of new stewards each time a basic training is held in your DLC and then give them a call or drop an email to welcome them and offer assistance. Invite them to your steward network meetings.

## **Records**

### *[Why Should I Keep Good Records?]*

In addition to the fact that record-keeping is part of your position as Chief Steward, there are lots of practical and helpful reasons why this is a good idea.

Accurate record-keeping helps the union do a better job with and for members. Grievances get filed on time and are more likely to be successful. Complaints and ULPs have accurate documentation, and generally all of your work is more effective.

The union can do a better job of planning if it can refer back to work that has been done.

The work you are doing may set a legal precedent, or contribute to the documentation that does set a legal precedent so it's important to document accurately.

Negotiations and bargaining efforts rely on reports and records from stewards and DLCs as they move the bargaining process forward.

Understanding members' concerns will also be simplified when you have written confirmation of a conversation or meeting that you can read or share.

Sharing resources between stewards and DLCs can be very helpful - so you and your fellow stewards are not re-inventing the wheel each time you take on a case.

Keeping good records also ensures that you have accurate contact information on file for your stewards and your co-workers so you can make fast connections if you are in need of assistance or are forming a working group. Be sure to share any updated contact information with the MRC.

Your level of experience and expertise will continue to improve, and if you record your accomplishments you will be able to give evidence of your expertise if you should want to run for another office or apply for a different job.

Keeping accurate records makes your work easier - you don't have to go searching for the answer to the next question or do the same work twice because you did not

record it the first time.

*[What should I keep track of?]*

Specifically, the Chief Stewards' reporting and record-keeping includes keeping track of your own participation in DLC activities - remember you must attend at least two per year to remain a steward.

The other steward certification requirement you should record is your attendance at Advanced Steward Training courses. For instance, be sure that this course, Governance 300, is part of your record of the Advanced Steward Training that you have completed.

The training and certification of new stewards is a significant responsibility of the Vice President Chief Steward and good records need to be kept so these leaders can maintain their certification and progress to other levels of leadership.

The ongoing course work of new and existing stewards also needs to be documented.

Another example of something you must report includes DLC activities, events and representation projects.

Any time you meet with a steward or member, take advantage of the situation and ask for updated contact information. Record this in your list or database, and be sure to also send the new information on to the MRC.

It is essential that you get timely grievance reports from all stewards - which grievances are started, in process and completed.

You will need all of this information for the quarterly reports that you make to the Local 1000 Vice President for Organizing and Representation.

You should also document conversations that could lead to complaints or grievances. A quick note about the main points of the discussion written in your calendar will prove useful in the future.

Having these notes to refer back to can add valuable information that will help as you work with people at the worksite. You may then see a trend over time that was not clear before. Observing trends in this way will also help you give valuable suggestions to your DLC and to the union about long-range planning.

Certainly for your own work, keep any records having to do with official union business such as travel or meeting attendance that will require reimbursement.

### **How can I keep track of all this?**

Figure out what record-keeping method will work best for you -

Talk with other stewards about their methods, their tricks and their shortcuts.

Keep a notebook or calendar with you to easily write down issues, contact information and conversations.

You can also download the SkillBrief chart titled, “Steward’s Summary of Activities.” You can change this form to fit your needs or use it just ‘as is.’

Also, use the other SkillBriefs listed in this course, and, keep it simple!

## **Reports**

There are three basic categories of stewards in most DLCs, and all responsible for specific reports.

### *[Chief Stewards]*

As we have already stated, Chief Stewards are required to report quarterly to the Local 1000 Vice President for Organizing and Representation on the following:

Any representation activities that are going on in your area; any basic or advanced steward trainings; any grievances in process and their status; any settled grievances and all information you have received from the stewards in their reports.

### *[Senior Stewards]*

Senior Stewards represent subsections of their DLC called ‘locals.’ They report to their Chief Steward about any representation activities in their area, any grievances that have been filed and the progress or status of these grievances, as well as any training that is planned or has been provided in the local.

All of the reporting and record-keeping we have been discussing will also serve well to assist other stewards - giving them other situations to compare to, supporting their research and providing options for language as they write grievances.

Also, senior stewards are in a unique position to observe trends over time, since they work closely with the members and also interact regularly with leadership.

### *[All Stewards]*

All stewards are responsible for gathering data, maintaining records and reporting to the union as required about issues and events such as contract negotiations, grievances, legislation or other union business.

## **Confidentiality**

Let’s look at a baseline for confidentiality standards for stewards and other member leaders.

All stewards have access to a wide array of confidential information. In this position, you must keep in mind that you are responsible for keeping that information

private.  
Some issues that can arise include:

- *Casual public conversations* - be especially careful about what you discuss in a

public setting with another steward or a member. Do not mention names or specifics of any issue. If you need to get specific, take the conversation to a private area.

- *Giving reports* - you will frequently report to individuals or groups about grievances or issues that have come to you. Choose your words carefully. Many people don't want their name or their situation discussed in front of a group.
- *Reflect* - take some time to think about your responsibilities as Chief Steward. In this leadership position you will need to moderate your comments and monitor what you say and where you say it. Keep in mind that you are modeling appropriate behavior, maintaining confidentiality and privacy, as well as ethical behavior for other stewards.

### **Chief Steward's Tool Kit**

One good way to be prepared as a Chief Steward is to assemble a tool kit for yourself.

This tool kit should include things to hand to stewards such as:

- copies of the contract, or
- templates and copies of filled out grievance forms as examples,
- copies of the Weingarten Rights,
- copies of the Policy file and any articles that you use frequently,
- a list of arbitration decisions that are applicable to your area,
- a list of stewards and their updated contact information,
- updated workplace contact information for management including department phone lists, and
- any other documents you use regularly or would like your stewards to be using

You can get these kinds of supplies from the MRC or the URC.

It's also a good idea to pull together a similar kit for any new stewards you train or work with.

### **Review Questions**

Who does the Senior Steward report to?

- a. *The Chief Steward*
- b. The Union President
- c. The DLC Chairperson
- d. The BUNC

The answer is A - senior stewards report on grievances and representation efforts to the Chief Steward.

How many duties of a Chief Steward can you name?

Responsibilities of a Chief Steward include participation in at least 2 DLC activities per year, taking Advanced Steward Training courses, delivering or coordinating steward trainings and keeping track of steward certifications. Don't forget to report quarterly to the Local 1000 Vice President for Organizing and Representation and communicate grievance settlements to the senior stewards. Be sure you get grievance reports in a timely fashion from stewards and meet regularly with the stewards in your area. Always remember your status as a leader and maintain confidentiality and privacy.

You can check the Policy File for a complete list of duties of the Vice President/Chief Steward.

### **End of Course**

This completes Governance 300.

Your next step is to take and pass the Final Exam to complete this course.

Chief Stewards should take the other required courses to receive their Certificate of Completion in the Governance track.