LEADERSHIP ACADEMY
SEIU LOCAL 1000

Audio Script
REP 110 - Reporting and Record-Keeping

This is the actual audio that was recorded for Representation 110.
Use it for a reference or study guide.

SkillBrief

Representation 110 – Reporting and Record-Keeping

Welcome to Representation 110

This course covers steward requirements for reporting and record-keeping.

The Policy File for Local 1000

The Policy File for Local 1000 has guidelines for steward reporting and record-keeping. It says:

"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 Department of Personnel Administration and State Personnel Board 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."

Members Ask Stewards

A steward is frequently consulted by members for a wide variety of issues.

Whenever an employee comes to you for information or advice, even if it is for a simple question, be sure to document the conversation.

Take notes: Be specific about what the member wants, record details of the conversation and don't forget to date everything! And, always keep a copy of your notes for yourself.

If the conversation leads to a grievance or other action you will need to have as much accurate history as possible.

After your conversation, advise the employee to contact the Member Resource Center.

You should also contact the MRC to share your notes.

They will start tracking the issue and will connect you with a union resource person if need be.

The MRC

The Member Resource Center, or MRC, is a call center that provides members, employees and stewards with quick answers to all sorts of questions.

The friendly folks in the MRC use a computer database that keeps track of member information, calls and resources.

This centralized information storage can help stewards and Local 1000 with planning.

When a member or steward calls with an issue or question, the MRC will either provide the answer or refer the issue to the appropriate union representative at the Union Resource Center, or URC.

To summarize, the MRC provides members and stewards with centralized tracking of information and resources, it updates member's contact information, provides necessary referrals to appropriate resources and helps with planning.

The URC

The Union Resource Center, or URC, receives information from the MRC using a database that they share.

The URC then assigns a union representative to the issue and that representative will work with the steward to take appropriate action.

A grievance, appeal, or other action is entered into the database and tracked in that same database by the Union Resource Center.

The steward and employee can provide status updates about their case and they will be tracked for them in this central location.

When there is a case resolution, the Union Resource Center will track the closing of the case and any follow-up notes can be added.

In short, the URC connects the steward with a union representative who provides help and support as the steward works with members.

What should I record?

As the investigation of the case begins, have the employee keep records of anything relating to their work. They should keep things like

- performance assessments
- records of any discipline
- adverse action history

- client assessments of their work
- thank-you notes or other positive comments they received
- and any other notes or e-mails that are evidence of discrimination
- They should also keep medical, counseling, or other professional records. Include records of any payments they made.

The more detail you document, the more likely you are to be successful with your members' issues.

How is the evidence used?

The reason for collecting documents is to evidence the case. You will need the evidence, the documents, and the statements from witnesses to prove the employee's case, whether it is a grievance, a State Personnel Board appeal, or a DPA appeal.

Thorough documentation will also protect you and the quality of your work should a member come back to suggest that you missed a step or filed too late, or made some other error.

This documentation should be kept in a secure location, such as your desk at work.

Other Records to Keep

You should keep other kinds of records, too.

Be sure to fill out the proper forms any time you have new recruits, meet and confers, complaint meetings, and formal or informal grievance meetings.

Other times to take notes include Skelly hearings, AWOL separations, resignation appeals, and group meetings.

Any time you take notes, be specific - list the issues, the date, any participation and questions, and meeting attendance. These details will help in later proceedings.

You should send all records of grievances to the Union Resource Center for centralized documentation.

Stewards may be asked periodically for these notes and information to update the union records.

Finally, any time you travel on union business keep track of your expenses - travel, lodging or meals…you can get reimbursed for some union expenses.

Timeliness

There are strict timelines for many processes a steward participates in.

You, the steward, need to pay close attention to make certain that all timelines are followed precisely.

There can be significant problems if these timelines are not followed.

For example…if you miss even one grievance timeline, the entire grievance will be dismissed.

There are also legal timelines for grievances, for complaints and for appeals.

Another reason to file paperwork in a timely fashion is so you and the employee receive prompt reimbursement for expenses that meet the requirements.

Reimbursement

Stewards are eligible for reimbursement for expenses in connection with official business of Local 1000.

To receive reimbursement, you need to file a claim for the appropriate travel, lodging and meal expenses for the time necessary to leave, meet and return.

The form you need to file is available online – and you must have accurate receipts for your expenses.

The rules for expenses are specific.

Details are in Division 11 of the SEIU Local 1000 Policy File.

It is also important to file this paperwork on time so you receive prompt reimbursement for expenses that meet the requirements.

Reasons to Keep Records

Accurately and continually updating your steward records will help your expertise as a steward, and will help the union in a variety of ways:

But why should I bother? This takes time and I am just so busy…

- First, these records provide insight into the level of experience of individual stewards, and of the steward group as a whole.
- Also, accurate contact information makes all of your work easier
- Accurate recording of grievance requests or filings helps your member be successful in their grievance and, in addition, provide precedence for future filings. Legally, the precedence validates a grievance by providing evidence of prior proof of the grievance.
- Another reason for ongoing accuracy is the use of these records in contract negotiations and bargaining.
- This kind of resource can provide insight for other stewards as they provide support for members and do similar grievance filing.

In addition to all of these reasons, if you are keeping good notes about members and conversations, you will gain understanding about their concerns and priorities and that can help the steward and the union with planning.

Reports: A Guide

The following chart should help you understand the next several slides on required reports.

The chart is a visual guide that describes who reports to whom.

Stewards first and foremost report to members about job information.

When a member has contacted a steward about an issue, the steward takes notes and creates a report. The steward then gives that report to their senior steward.

The senior steward will then submit a report to their Chief Steward.

The Chief Steward in turn reports to the DLC president.

Reports to Members

Reporting back to members is not a *formal* requirement, and there are no regulation forms or processes, but be sure you report back to members anytime you learn anything new about their job!

This will build your support with your members and keep them informed. It will help members utilize union resources and can even help you recruit *new* members!

Reports: All Stewards

The SEIU Local 1000 policy file lists of the requirements of stewards.

Part of this file says that stewards are responsible for: “gathering data, maintaining records and reporting to the union as required for contract negotiations, grievances, legislation or other union purposes.”

The policy file gives an overview of the kinds of records and reports required of each steward.

Reports: Senior Stewards

<u>Senior</u> Stewards submit reports to their Chief Steward.

These reports cover the progress and results of any organizing activities that were planned or that happened in their area.

Another set of reports will include any grievances filed, and their progress.

Also, any training that is planned or has been provided will be reported to the Chief Steward.

Reports: Chief Stewards

Chief Stewards are required to report quarterly to the DLC president on their area representation programs.

They also report on any grievances in progress, settled grievances and reports that they have received from stewards.

Steward Status

If you want to continue as a steward, there are several requirements to fulfill, and one of these is to meet the recording and reporting requirements as stated in the Policy File.

Good record-keeping of other kinds –attendance, personal medical leave or expense reports - the kind of information that you keep for your own sake – can help you establish your own expertise and level of experience in the process of continuing your certification as a steward.

Review questions for Reporting and Record-Keeping

Who does the Senior Steward report to?

a) ***The Chief Steward***
b) The Union President
c) The DLC Chairperson
d) The BUNC Team

The correct answer is A - The Senior Steward reports to the Chief Steward.

In what ways can the MRC/URC be used to help a steward with their record-keeping and reporting?

a) ***The URC will print monthly case reports for all chief stewards and DLC presidents***
b) ***The steward can provide information to the MRC for storage***
c) ***The URC provides one place for information, helping to keep it all together***
d) The MRC will chase down incomplete information in a grievance

A, B, and C are all correct - The MRC/URC help a steward with record-keeping and reporting by printing monthly case reports for chief stewards and DLC presidents, storing information for stewards, and keeping all information together.

What is the information stewards must provide to the URC union representatives?

a) All contacts with members

b) Grievances and appeals
c) Upcoming meetings
d) Unpaid dues

The correct answer is B - Stewards must provide thorough information on grievances and appeals to the URC union representatives for support and documentation.

End of Course

This completes Representation 110.

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

Continue to take the four other required courses in the Representation track to complete your certification.