

Association Roles, Relationships and Responsibilities

Is your chapter effective? Are you having internal issues around lack of knowledge or communication within your chapter? Who is making the decisions, and who should be making the decisions? Coordinating the actions/interactions of your Executive Board, Bargaining Team, Grievance Committee, Membership Committee, and Organizing Team will create an effective Local. Of course, sharing information and educating the site reps, and in turn, your membership, will provide the Association with a strong powerbase for negotiations, school board elections, issue organizing, etc.

Structure (See Chapter Organizational Chart)
Structure is everything. Structure is established by the Executive Board in order to implement the goals and policies determined by the membership. Communicating the structure is an essential element of implementing good structure. Structures should be tested regularly during a campaign with the results of the structure test informing where the union needs to put resources to improve structures. Good structure allows us to create unity within the membership. Unity leads to power. Power leads to parity with the employer. Parity leads to good contracts - respectable salaries, quality benefits, etc.

Membership – The Policy Making Body
The membership is the ultimate authority for policy-making decisions in all chapters. In smaller chapters, regular general meetings of the membership are held to adopt policies and determine program direction. In larger chapters where it may be difficult to regularly assemble the entire membership, policy-making authority is delegated to an elected policy body, usually designated as the "Representative Council," which meets regularly throughout the year.

The Representative Council may create permanent standing committees and temporary "task forces," or "ad hoc" committees to study matters referred to them and develop policy recommendations to be acted upon by the policy body. The Executive Board appoints the leaders and members of such committees and directs and monitors their activity based on the decision made by the membership.

The Executive Board – The Policy Implementation Body
Policy implementation is typically delegated to an "Executive Board" usually consisting of the chapter's elected officers and an appropriate number of Directors elected by the membership.



This group executes the business of the chapter within the policies adopted by the membership or Representative Council. The Executive Board is also responsible for overseeing the coordination of Association activities.

The Executive Board may create standing or ad hoc committees to assist in implementing policy. These committees, together with the Executive Board constitute the "action arm" of the chapter. Committees always remain accountable to the Executive Board who created and appointed them. No committee may direct the actions of the chapter, except under express authority delegated to it (e.g., the Organizing Team may be authorized to "call the shots" during a crisis). The chairs of the Bargaining Team, Organizing Team, Grievance Committee, Membership Committee, etc., serve as liaisons to the Executive Board in an ex-officio, non-voting capacity.

The Executive Board should be kept fully informed and in close communication with the standing committees. Each member of the Executive Board should act as a liaison to a specific committee (i.e., the President typically acts as the liaison to the Bargaining Team). The Executive Board should not attempt to "micro-manage" the efforts of the Bargaining Team, Organizing Team, Grievance Committee, Membership Committee, etc., so long as the teams adhere to the goals and policies adopted by the Executive Board, as directed by the membership.



The Bargaining Team
(Standing Committee of the Executive Board)

The chair of the Bargaining Team is a liaison to the Executive Board in an ex-officio, non-voting capacity. The Bargaining Team is the negotiating arm of the association serving at the direction of the Executive Board. It exists only to negotiate with the employer. The team does not decide policy. The policy body is the chapter membership. In larger associations, the members delegate some policy-making powers to a representative council.

When it comes to making public statements, the Chapter President is the official spokesperson for the chapter, just as the Chief Negotiator is the official spokesperson (duty may be delegated) for the Bargaining Team at the bargaining table. In periods of critical negotiations, the Executive Board may authorize public statements by the Chief Negotiator and/or Chair of the Organizing Team as the person most in touch with the situation.

At the direction of the bargaining unit through site meetings and/or surveys, the Executive Board adopts (in conceptual form) the set of bargaining goals to be negotiated by the Bargaining Team, sometimes referred to as a platform. Having set the bargaining goals, the Executive Board should then delegate to the Bargaining Team the authority to make the best possible "deal." While the Bargaining Team must have authority to make proposals and counterproposals, it should consult with and receive direction from the Executive Board.

In addition to getting input from all bargaining unit members prior to “sunshining” any proposals, the Bargaining Team should consult with the Grievance Committee to determine the record of prior grievances and practices under the old collective bargaining agreement and the implications of new or modified language.

The Bargaining Team should publish a special bargaining bulletin within approximately twenty-four hours of the conclusion of each bargaining session. The bargaining bulletin should be written by the Bargaining Team and the Chief Negotiator should approve the final copy before it is sent to the Organizing Team for distribution to the Site Representatives and unit members.

During negotiations, working closely with your Organizing Team is essential. It’s the job of the Organizing Team to recommend what actions unit members should take to support the Bargaining Team’s position at the table, to tell unit members the importance of the issue, and what they can do to help (come to the mass meeting, wear armbands, join in informational



picketing, etc.).

The Association has a responsibility to maintain communications with its unit members. Site representatives should be kept fully informed so that they can answer bargaining unit members' questions. Unit members must know and understand the issues in order to support the bargaining stance.

As the Executive Board directs the bargaining activities, subject to policies established by the active membership, it is suggested that the Bargaining Team review "tentative agreements" with the Executive Board.

Upon ratification of an agreement, the Bargaining Team should consult with the Grievance Committee to review the negotiated agreement and the intent of the parties. It is also responsible for training the Executive Board and site representatives about the new contract language.

It is important to note that the most transparent behavior for chapter leadership is to share all tentative agreements and not just a summary with members as part of the ratification process.



BARGAINING TEAM - ROLES AND RESPONSIBILITIES

PRESIDENT:

- Oversees the establishment and operation of the bargaining program
- Appoints Bargaining Team unless Bargaining Team is elected
- Coordinates bargaining program with executive body and governance body
- Ensures the Bargaining Team is provided adequate training
- Ensures that changes in the contract are well advertised to bargaining unit
- Official public spokesperson for the association, but may designate the chief negotiator to speak publicly on behalf of the association for bargaining issues
- Responsible for convening a special meeting of the Executive Board to determine whether or not the Executive Board can recommend the proposed settlement for ratification, as appropriate

EXECUTIVE BODY (Executive Board):

- Approves the President's appointments to the Bargaining Team
- Aids in establishing and operating bargaining program
- Assists in preparation of governance document changes (Constitution and Bylaws)
- Establishes channel of communication
- Proposes budget to Governance Body
- Adopts (in conceptual form) the set of bargaining goals, at the direction of the membership
- Delegates authority to the Bargaining Team to make proposals and counter proposals to the district and to attain the best possible “deal”
- Oversees the distribution and collection of bargaining surveys
- Makes formal recommendations for ratification of a proposed settlement, if appropriate
- If appropriate, responsible for helping to “sell” a tentative agreement
- Responsible for the logistical arrangements for contract ratification vote



GOVERNANCE BODY (Representative Council/Site Representatives or General Membership):

- Adopts policy statements outlining the bargaining process
- Adopts changes in governance documents
- Adopts budget (including grievance, bargaining, and organizing programs)

SITE REPRESENTATIVE:

- Discusses important issues and shares the views and input of the bargaining unit members at their site with the Representative Council and/or Executive Board
- Serves as the official channel through which communication and publications can be easily transmitted between the association and bargaining unit members at their site
- Participates in meetings and activities in support of the bargaining process

BARGAINING TEAM:

- Committee Chair serves as ex-officio non-voting member of the Executive Board and attends Executive Board and Representative Council / Membership meetings
- Operates association bargaining program; annually reviews association bylaws and standing rules pertinent to the Bargaining Team
- Recommends bargaining budget
- Sets Bargaining Team goals in support of association's goals
- Receives bargaining training
- Surveys all bargaining unit members, as required by the duty of fair representation (EERA)
- Prior to the "Sunshining" the association's initial proposal to the district, consults with the Grievance Committee about grievances filed during the duration of the contract and issues that were not grievable but should be considered
- Communicates the association's and district's "sunshine" proposals to all bargaining unit members
- Receives assistance in the development, negotiation, and refinement of the contract grievance procedure from the Grievance Committee
- Works with CTA staff on budget analysis, contract analysis, language development and uses other resources, as appropriate



- Oversees development of association proposals and priorities for bargaining, based on assessments/surveys from the bargaining unit members
- Develops bargaining calendar and timetable
- Publishes a special bargaining bulletin to be sent out to all unit members within approximately twenty-four hours of the conclusion of each bargaining session
- Participates in coordinated bargaining meetings with surrounding associations
- Consults with the Organizing Team with regards to the efforts needed by the membership to support bargaining
- Consults with "special interest" groups within the bargaining unit, as needed
- Maintains official bargaining files, including copies of all proposals made by both parties and maintains official association notes of each bargaining session
- Has thorough knowledge of contract, policies, laws, and regulations
- Responsible for notifying the Chapter President once settlement is imminent
- Prior to a new Collective Bargaining Agreement being printed and distributed to your unit members, coordinates team review of a draft of the new Collective Bargaining Agreement that incorporates all of your Tentative Agreements. Have a District Representative and an Association Bargaining Team member review each page of the draft CBA – old and new language - and date and initial each page. Have the District make you a copy of the signed document and save a copy in your bargaining binder. This takes time, but it is worth it to ensure that old and/or newly ratified language does not get inadvertently omitted or modified
- After ratification vote of a tentative agreement, responsible for educating the unit members about contract changes and is responsible in helping to "sell" the settlement to the membership
- Upon ratification of new contract language, consults with the Grievance Committee about the intent of new or modified language
- Assists in educating the bargaining unit members about contract changes

HANDOUT

THE ORGANIZING TEAM
(Standing Committee of the Executive Board)

Organizing creates solidarity among our unit members. Solidarity creates the powerbase required to bargain good contracts or prevail in any stand the association takes on a given issue.

The Organizing Team should have the same status as the Bargaining Team within the association's structure. It is the responsibility of the Organizing Team, through the direction of the Executive Board, to generate unity over issues important to the association. This includes establishing member and community support for bargaining efforts, school board elections, or taking a position for or against a specific issue ("issue organizing") etc.

The Organizing Team is responsible for developing an organizing plan in coordination with information received from the Bargaining Team, Grievance Committee, and Membership Committee depending on the issue at hand. The Organizing Team is then responsible for presenting the organizing plan to the Executive Board for approval and then implementing the plan. The plan should be developed based on knowledge attained from internal/external assessments. The plan should include a calendar of events and consideration in coordinating organizing activities around the association's master calendar. Additionally, the Organizing Team is responsible for adjusting strategies based on new information and changing needs.

Due to the sensitive nature of Organizing Team meetings, discussions should be confidential. Team members should be able to state their viewpoints without creating an appearance of disunity before the membership. The Organizing Team is accountable to the Executive Board and operates within the association's goals and policies. However, the Organizing Team should not be micro-managed by the Executive Board.

During negotiations, working closely with your Bargaining Team is critical. A member of the Bargaining Team should attend all planning meetings in an effort to avoid working at cross purposes. It's the job of the Organizing Team to decide what actions unit members should take to support the Bargaining Team's position at the table and share with Site Representatives and unit members the importance of the issue, and what they can do in order to participate in collective action (come to the mass meeting, wear armbands, join in informational picketing, etc.). The Association has a responsibility to maintain communications with its unit members. Unit members must know and understand the issues in order to support the bargaining stance.



During the organizing efforts involving a grievance, it is the job of the Organizing Team to decide what actions unit members should take to support the grievance. Again, it is important that the Organizing Team work with the Grievance Committee as a means to support their efforts and to better understand the issues.

Often political organizing is treated separately from contract or issue organizing; they are the same. Ultimately, the purpose of our involvement in political organizing, such as school board races, is to secure enough votes to obtain a good contract settlement. Organizing is a tool to be used in any local association strategy. Organizing around contract negotiations is more effective if school board members know the association is also organized around politics.

HANDOUT

ORGANIZING TEAM - ROLES AND RESPONSIBILITIES

PRESIDENT:

- Oversees the establishment and operation of the organizing program
- Appoints Organizing Team
- Coordinates organizing program with executive body and governance body
- Ensures the Organizing Team is provided adequate training

EXECUTIVE BODY (Executive Board):

- Approves the President's appointments to the Organizing Team
- Aids in establishing and operating organizing program
- Assists in preparation of governance document changes (Constitution and Bylaws)
- Proposes budget to Governance Body
- Establishes channel of communication

GOVERNANCE BODY (Representative Council/Site Representatives or General Membership):

- Adopts policy statements outlining the organizing program
- Adopts changes in governance documents
- Adopts budget (including grievance, bargaining and organizing programs)

SITE REPRESENTATIVE:

- Discusses important issues and shares the views and input of the bargaining unit members at their site with the Representative Council and/or Executive Board
- Serves as the official channel through which communication and publications can be easily transmitted between the association and bargaining unit members at their site
- Participates in meetings and activities in support of the organizing efforts, tracks participation of unit members to which they are assigned as determined by the Organizing Team
- Maintains direct contact with members of the Organizing Team



ORGANIZING TEAM:

- Committee Chair serves as ex-officio non-voting member of the Executive Board and attends Executive Board and Representative Council / Membership meetings
- Operates association organizing program; annually reviews association bylaws and standing rules pertinent to the Organizing Team
- Recommends Organizing Team budget
- Assists with completing CTA special projects grant budget(s)
- Sets Organizing Team goals in support of association goals
- Receives organizing training
- Develops organizing calendar
- Develops and constantly adjusts organizing plan in coordination with the Bargaining Team, Grievance Committee, Membership Committee and Executive Board (includes: identifying the goals of the unit members, formulating measurable objectives, developing strategies and tactics to meet the goals)
- Unites unit members in activities of the association in support of bargaining, political action, and /or issue organizing (example: grievance issues, membership campaign)
- Publishes Organizing Team Newsletter/Fliers
- Maintains association communication systems, including a site “drop” system
- Creates and maintains community support communication systems, including personal e-mails, phone trees, and “drop” systems
- Maintains official records of Organizing Team’s efforts
- Maintains site maps
- Uses staff and other resources as appropriate
- Serves as the liaison to Site Representatives

HANDOUT

THE GRIEVANCE COMMITTEE
(Standing Committee of the Executive Board)

The chair of the Grievance Committee is a liaison to the Executive Board in an ex-officio, non-voting capacity. The Grievance Committee is responsible for implementing the grievance program. Representatives of the Grievance Committee assist unit members of the bargaining unit in processing grievances. The negotiated agreement is legally binding on the parties and must be enforced. The Grievance Committee shall carefully consider the merits of each grievance and make recommendations to the Executive Board regarding the submission of grievances to arbitration.

In the absence of a binding arbitration clause, the contract can be enforced through the Public Employment Relations Board (PERB) as an "Unfair Labor Practice" (ULP) charge and/or the courts as a "Breach of Contract." Every grievance filed helps to further define the contract language; it also has an impact on subsequent bargaining processes. It is nearly impossible to make needed improvements in the contract if no grievances have been filed concerning specific language. Management's standard response will be: "It's worked well up till now, why change it?"

On a regular basis, the Grievance Committee shall keep the Executive Board and the Bargaining Team informed regarding the operation of the grievance program. The Grievance Committee should publish a monthly update to the Executive Board and the Bargaining Team outlining the nature of all grievances filed and the status of all grievances filed (including any settlement agreements or informal resolutions).

As directed by the Executive Board, it's the job of the Organizing Team to decide what actions unit members should take to organize in support of or in opposition to a specific grievance issue and inform unit members of the importance of the issue, and what they can do to help (come to the mass meeting, wear armbands, join in informational picketing, etc.).

Prior to the Bargaining Team "sunshining" the association's initial proposal, the Grievance Committee should consult with the Bargaining Team to review the record of prior grievances and practices under the old agreement and provide a rationale concerning any implications of newly proposed or modified contract language.

Upon ratification of an agreement, the Grievance Committee should meet with the Bargaining Team to review the modified negotiated agreement and the intent of the parties.



GRIEVANCE COMMITTEE - ROLES AND RESPONSIBILITIES

PRESIDENT:

- Oversees the establishment and operation of the grievance program
- Appoints Grievance Committee
- Coordinates grievance program with executive body and governance body
- Ensures the Grievance Committee is provided adequate training
- Ensures that changes in the contract are well advertised to bargaining unit

EXECUTIVE BODY (Executive Board):

- Approves the President's appointment to the Grievance Committee
- Aids in establishing and operating grievance program
- Assists in preparation of governance document changes (Constitution and Bylaws)
- Proposes budget to Governance Body
- Establishes channel of communication
- Decides which cases will go to arbitration
- Establishes channel for appealing a decision not to arbitrate

GOVERNANCE BODY (Representative Council/Site Representatives or General Membership):

- Adopts policy statements outlining the grievance program
- Adopts changes in governance documents
- Adopts budget (including grievance, bargaining and organizing programs)

SITE REPRESENTATIVE:

- Discusses important issues and shares the views and input of the bargaining unit members at their site with the Representative Council and/or Executive Board
- Serves as the official channel through which communication and publications can be easily transmitted between the association and bargaining unit members at their site
- Participates in meetings and activities in support of the grievance program
- Knows contract/policies/regulations and identify potential grievances



- Observes timelines in processing grievances
- Represents and provides guidance to unit members in grievance processing at Level I
- Starts grievance files and documentation
- Maintains direct contact with members of the Grievance Committee

GRIEVANCE COMMITTEE:

- Committee Chair serves as ex-officio non-voting member of the Executive Board and attends Executive Board and Representative Council / Membership meetings
- Informs the Executive Board, Bargaining Team, Organizing Team, and all unit members of grievances filed and publishes a general monthly update
- Consults with the Organizing Team with regards to the efforts needed by the unit members to support grievance efforts
- Operates association grievance program; annually reviews association bylaws and standing rules pertinent to the Grievance Committee
- Recommends grievance processing budget
- Establishes Grievance Committee goals in support of association's goals
- Receives grievance training
- Aids in securing grievance representatives
- Establishes channel of communication among committee members and the Committee Chair
- Evaluates potential grievances
- Observes timelines in processing grievances
- Represents and advises unit members in grievance processing
- Counsels and advises unit members with problems
- Develops association position on grievances
- Advises Site Representatives regarding Level I grievance filing and processing
- Recommends to the Executive Board whether or not to submit a grievance to arbitration
- Works with CTA staff in the mediation/arbitration process
- Assists CTA staff in completing "CTA Crisis Assistance Panel – Arbitration Participation Fund" form and funding worksheet, if association is eligible for funding



- Develops, secures, and maintains grievance forms and records
- Attends arbitration hearings as association representative (with grievance representative, staff or attorney)
- Prepares appropriate grievance publicity
- Has thorough knowledge of contract, policies, laws, and regulations
- Prior to "Sunshining" the Association's initial proposal to the district, consults with the Bargaining Team about grievances filed during the duration of the contract and issues not grievable, but that should be considered
- Assists in the development, negotiation, and refinement of the contract grievance procedure
- Upon ratification of new contract language, consults with the Bargaining Team to review intent of new or modified language
- Discusses important issues and shares the views and input of the bargaining unit members at their site with the Representative Council and/or Executive Board
- Serves as the official channel through which communication and publications can be easily transmitted between the association and Site Representatives for distribution to bargaining unit members
- Participates in meetings and activities in support of the grievance process

HANDOUT

THE MEMBERSHIP TEAM
(Standing Committee of the Executive Board)

The Membership Team Committee ensures that the Association has accurate membership information for all bargaining unit members and, most importantly, creates and promotes programs that engage unit members and educates them about the benefits of belonging to the Association.

PRESIDENT:

- Oversees the establishment and operation of all programs
- Coordinates all programs with executive body and governance body
- Ensures that the Membership Team Committee is provided adequate training

EXECUTIVE BODY (Executive Board):

- Approves the President's appointments to all committees
- Aids in establishing and operating programs
- Assists in preparation of governance document changes (Constitution and Bylaws)
- Proposes budget to Governance Body
- Establishes channel of communication

GOVERNANCE BODY (Representative Council/Site Representatives or General Membership):

- Adopts policy statements outlining programs
- Adopts changes in governance documents
- Adopts budget (including grievance, bargaining, membership, and organizing programs)

MEMBERSHIP TEAM COMMITTEE:

- Maintains direct contact with the Executive Board, site representatives, and members of the Organizing Team
- Develops annual membership program (plan, calendar, and budget) in coordination with the Executive Board, Bargaining Team, Grievance Committee, and Organizing Team. Submits annual plan and budget to the Executive Board for approval
- Creates and maintains database of unit member contact information, including site information, personal emails, school email, home address, and phone numbers



- Shares membership lists with site representatives in order to get them updated
- Helps assist the site representatives in the implementation of a "buddy system," which pairs up new and "veteran" staff as a support system
- Stays informed about membership benefits and programs of the local association/CTA/NEA and educates site representatives and unit members about the benefits of belonging to the Association
- Maintains site unit member contact information
- Updates membership information to CTA



SITE REPRESENTATIVES - ROLES AND RESPONSIBILITIES

PRESIDENT:

- Oversees the establishment and operation of all programs
- Coordinates all programs with executive body and governance body
- Ensures that Site Representatives receive adequate training

EXECUTIVE BODY (Executive Board):

- Approves the President's appointments to all committees
- Aids in establishing and operating programs
- Assists in preparation of governance document changes (Constitution and Bylaws)
- Proposes budget to Governance Body
- Establishes channel of communication

GOVERNANCE BODY (Representative Council/Site Representatives or General Membership):

- Adopts policy statements outlining programs
- Adopts changes in governance documents
- Adopts budget (including grievance, bargaining, and organizing programs)

SITE REPRESENTATIVE:

- Attends Representative Council and General Membership meetings
- Participates in meetings and activities in support of association programs
- Discusses important issues and shares the views and input of the bargaining unit members at their site with the Representative Council and/or Executive Board
- Serves as the official channel through which communication and publications can be easily transmitted between the association and Site Representatives for distribution to bargaining unit members
- Serves as an advocate for the bargaining unit members at their site, including assisting with filing grievances and in disciplinary meetings with management
- Conducts regular site elections and polls of the membership



- Conducts regular meetings to share information to bargaining unit members and to encourage participation in association programs
- Maintains and up-to-date site bargaining unit member list with contact information and tracks member participation in organizing actions in concert with the Organizing Team for the site members to which the rep is assigned
- Shares updated site unit member contact information with Membership Committee Chair
- Maintains association bulletin board at school site
- Recruits new members and new leaders
- Educates bargaining unit members about their rights
- Knows contract/policies/regulations and identifies potential grievances
- Knows the grievance procedure of the Contract
- Investigates possible grievances, files lower level grievance claims and stays in contact with the Grievance Committee
- Represents and provides guidance to unit members in grievance processing at Level I
- Observes timelines in processing grievances
- Starts grievance file and documentation
- Maintains direct contact with members of the Bargaining Team, Grievance Committee, Membership Committee and Organizing Team
- Creates, maintains, and initiates association member communication systems, including personal e-mails and phone trees
- Uses a “buddy system” to pair up new and “veteran” staff to support one another
- Knows who to call for assistance within the association
- Contacts new bargaining unit members at the beginning of the school year
- Educates unit members about the benefits of belonging to the association