

# NYS PUBLIC EMPLOYEES FEDERATION, AFL-CIO

## UNION SKILLS COURSE OFFERINGS

COMPILED BY THE PEF EDUCATION DEPARTMENT



New York State  
Public Employees Federation  
AFL-CIO



*Kenneth Brynien*  
*President*

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*Call: 1-800-342-4306, ext.. 328*

**Message from the President:**

The PEF Education Department designs and delivers or coordinates with other departments and vendors for the delivery of union skills training courses, workshops and conferences for elected representatives. In addition, department staff provides staff support for the Article 15 PEF/State Joint Committee on Professional Development for the assessment, analysis, design, implementation and monitoring of educational assistance and professional development programs for PEF represented employees. Building skills at all levels of the organization, the Education Department provides educational opportunities that empower members, mobilizers, stewards, leaders and staff to successfully represent PEF on member, division, agency, regional and statewide issues, as well as improve their state job and career opportunities.

On the pages that follow, you will find that the Education Department has developed a diverse menu of workshops. Requests for these services may be generated through Stewards, Council Leaders, Executive Board members, Regional Coordinators or Statewide Officers. In addition, the Education Department staff is available to design new training programs that focus on specific issues and topics.

New Stewards can contact either the Education Department or their local field office for information on the scheduling of the Basic Steward Training Program.

If you have any questions or would like a training program delivered in your region, agency, or division, please contact the Director of Human Resources and Education.

*Kenneth Brynien  
President*

## LISTING OF COURSES

### **BASIC STEWARD TRAINING – CERTIFICATE PROGRAM**

#### **NEW STEWARD ORIENTATION - THIS IS PEF**

- #BST01 THE MANY ROLES OF THE STEWARD**
- #BST02 KNOW YOUR CONTRACT**
- #BST03 GRIEVANCE PROCEDURE**
- #BST04 DISCIPLINE AND DISCHARGE**
- #BST05 BASIC MOBILIZATION PRINCIPLES FOR STEWARDS**

### **ADVANCED STEWARD TRAINING**

- #AST01 STEP II GRIEVANCES**
- #AST02 THE TAYLOR LAW AND IMPROPER PRACTICE**
- #AST03 COUNSELING**
- #AST04 ARTICLE 17 CLOSE UP – OUT-OF-TITLE WORK  
IS BAD FOR EVERYONE**
- #AST05 PROBLEM SOLVING**
- #AST06 GRIEVANCE INTERVIEWING TECHNIQUES**
- #AST07 DUTY OF FAIR REPRESENTATION**
- #AST08 AMERICANS WITH DISABILITIES ACT**
- #AST09 MEDIA**
- #AST10 CREATING A POWERFUL NEWSLETTER FOR YOUR DIVISION**
- #AST11 COUNSELING AND INTERROGATION**
- #AST12 PERFORMANCE EVALUATION**

### **LABOR MANAGEMENT COMMITTEE TRAINING**

- #LMC01 LABOR/MANAGEMENT - NEW COMMITTEES**
- #LMC02 LABOR/MANAGEMENT**
- #LMC03 LABOR/MANAGEMENT: MISSION STATEMENT**
- #LMC04 JOINT LABOR/MANAGEMENT TRAINING: BEYOND ARMED  
TRUCE**
- #LMC05 LABOR/MANAGEMENT - A NEGOTIATION STYLE SURVEY**

### **CIVIL SERVICE ENFORCEMENT STEWARD TRAINING**

- #CSE01 CIVIL SERVICE I**
- #CSE02 CIVIL SERVICE II**
- #CSE03 EXPOSING THE COST OF CONTRACTING OUT**

## **LEADERSHIP TRAINING PROGRAMS**

- #LTP01 LEADERSHIP 101**
- #LTP02 PARLIAMENTARY PROCEDURES**
- #LPT03 CONFLICT RESOLUTION**
- #LPT04 DIVISION FINANCE FOR COUNCIL LEADERS**
- #LPT05 DIVISION TREASURER TRAINING**
- #LPT06 TEAM BUILDING**

## **MOBILIZATION TRAINING PROGRAMS**

- #MT101 Mobilization 101**
- #MT102 Charting and Mapping your Workplace**
- #MT103 Orienting Your Mobilizers**
- #MT104 Recruiting Volunteers**
- #MT201 Updating Your Workplace Charting and Mapping**
- #MT202 Testing Your Mobilization Network**
- #MT203 Selecting Issues for Local Work-Place Campaigns**
- #MT204 Using Mobilization to Help Resolve L/M Issues**
- #MT205 Running Effective Local Union Meetings**
- #MT206 Communicating our Message: the Use of Flyers, Newsletters, E-Mail**
- #MT207 Developing Allies: Building Community Coalitions**
- #MT208 Creative Ways to Mobilize the Membership**

## **HEALTH & SAFETY TRAINING PROGRAMS**

- #HS01 Emergency Preparedness/Emergency Action Plans**
- #HS02 Infectious Diseases (HIV, Hepatitis, TB, Smallpox)**
- #HS03 Needlestick Injury Prevention**
- #HS04 Office Ergonomics**
- #HS05 Violence in the Workplace**
- #HS06 Indoor Environmental Air Quality**
- #HS07 Occupational Stress**
- #HS08 Workers' Compensation**
- #HS09 Bioterrorism Preparedness**
- #HS10 Right-to-Know/Chemical Awareness**
- #HS11 Back Injury Prevention Ergonomics**
- #HS12 Personal Protective Equipment/Respiratory Protection**
- #HS13 Confined Space**
- #HS14 Strengthening Your Health and Safety Committee**

# **BASIC STEWARD TRAINING (UNION SKILLS)**

It is a PEF Policy that all newly elected stewards must complete the Basic Steward Training Program and receive the Basic Steward Training Certificate to effectively represent their members at the work sites. This training will give provide new stewards with the basic union skills necessary to function as a steward with the Division leadership and Field Representative. After completing these training modules, a certificate will be awarded and you will be eligible to take the advanced steward training program. Call your Regional Field Office or the Education Department for scheduling information.

## **NEW STEWARD ORIENTATION - THIS IS PEF**

This session will familiarize stewards with a short history of PEF, a description of who is in the PS&T bargaining unit, and a description of the structure of PEF and as well as a description of the various PEF Departments.

## **#BST01 THE MANY ROLES OF THE STEWARD**

This is one of our four new basic steward training modules. This workshop will review the various roles stewards play in the union and will motivate and inspire stewards in the representation of PEF members. Although it is geared for the new steward, experienced stewards are also welcome to attend.

## **#BST02 KNOW YOUR CONTRACT**

In the PEF arena, the contract is the most used booklet, but often the most misunderstood. Through the use of a quiz, role plays and small group activities, participants of the workshop will come to understand the role that the contract plays when resolving workplace issues; locate employee rights, benefits and enforcement procedures within the contract, identify which Articles deal with specific issues, Interpret language used in a contract and outline the grievance procedure. This workshop will help participants better understand how changing contract language can affect them personally.

## **#BST03 GRIEVANCE PROCEDURE**

This module will provide stewards with the ability to distinguish between the types of grievances as well as to investigate and file grievances in the appropriate forum. The steward's role on the timeliness of grievance filing is stressed. Grievance role plays are included in this module to give practical experience at grievance processing.

#### **#BST04      DISCIPLINE AND DISCHARGE**

In this module, the steward is given the fundamentals of handling disciplinary problems in an orderly and timely fashion. Subjects emphasized are counseling, interrogation, notices of discipline, suspension, range of disciplinary penalties, confidentiality, timeframes and deadlines, and resignation and termination rights.

#### **#BST05      BASIC MOBILIZATION PRINCIPLES FOR STEWARDS**

The new Steward Module introduces participants to the basic principles of mobilization. Participants will examine the definition of mobilizing and learn the three main components of member mobilization. By the end of the workshop, participants will be able to build union strength around workplace issues by creating mobilization charts and initiating one-on-one contact with members.

## **ADVANCED STEWARD TRAINING**

A prerequisite to taking this program of workshops is completion of the Basic Steward Training certificate program. These advanced modules of steward training will give you a more in-depth look at some of the major areas of contract enforcement which assist stewards and leaders in representing their members.

#### **#AST01      STEP II GRIEVANCES**

Preparation and Presentation - This workshop will provide you with the skills to prepare and present a grievance at the second step of the grievance procedure covered under Article 34 in your contract. Role play and group discussion is used to cover the material.

#### **#AST02      THE TAYLOR LAW AND IMPROPER PRACTICE**

This workshop will explain the history and background of the Taylor Law, including what it is, how it works and when to use it in the context of our roles as NYS employees and members of PEF. The presenters will demonstrate one of the key aspects of the Taylor Law, - the Improper Practice Charge - and how to identify the difference between an IP and a Grievance.

### **#AST03 COUNSELING**

This workshop focuses on protecting the rights of members when counseling is done by management. This important area of the collective bargaining agreement will be examined through role playing of typical cases that are relevant to PEF members.

### **#AST04 ARTICLE 17 CLOSE UP – OUT-OF-TITLE WORK IS BAD FOR EVERYONE**

This workshop will assist participants in identifying what they do not know about out-of-title work and will provide practical information and discussion on why and how to file Article 17 grievances. The presentation will help you learn what is needed at every stage of the grievance procedure and, what happens when that procedure is exhausted. A review of specific cases will provide insight into what PEF and the State consider to be out-of-title assignments. In addition, participants will have an opportunity to discuss and ask questions about out-of-title work.

### **#AST05 PROBLEM SOLVING (2 HRS.)**

Problem solving is a process of identifying the difference between the current state and the desired state of affairs surrounding an issue for you, as union leaders. This workshop will have the participants working together in small groups using a problem solving model. Through this process, you will be able to tackle the ongoing issues brought to you by the rank and file.

### **#AST06 GRIEVANCE INTERVIEWING TECHNIQUES ( 2 HRS.)**

When members come to you with problems which may become a grievance, they are often upset, angry, and disorganized. It is critical that the steward utilize effective techniques to elicit all relevant facts of a situation to determine how it will be handled. Using role plays, participants practice the skills of effective interviewing.

### **#AST07 DUTY OF FAIR REPRESENTATION (2 HRS.)**

What is the union's responsibility in representing a member? Do all potential grievances need to be explored? What does the Taylor Law say about the Duty of Fair Representation? Through a review of several scenarios and related documents and laws, participants examine the legal and contractual sources of authority and accountability for PEF stewards.

### **#AST09 MEDIA (2 1/2 Hrs.)**

Learn how to effectively pitch your union stories and events to the local news media; how to handle various types of print and broadcast interviews; and how to speak in "sound bites" to improve your chances of being quoted. Workshop may include a simulated question and answer TV interview with participants. We request a minimum of 12 participants for this workshop.

### **#AST10 CREATING A POWERFUL NEWSLETTER FOR YOUR DIVISION**

Explore how an effective newsletter can increase accurate communication with members. Learn how to develop and produce a simple, direct and informative newsletter. This workshop covers tips on design basics, writing, layout, photography and production.

### **#AST11 COUNSELING AND INTERROGATION**

This workshop is designed to present important information on both Counseling and Interrogation through one workshop. By combining both topics into one workshop, participants can compare and contrast two very different actions that management can use when interacting with an employee regarding their work performance. Topics presented include Interrogation Theory, the rights of the employee under interrogation, and the role of the steward. Participants will also have an opportunity to review the standards for counseling employees and critique counseling memos that have been issued by supervisors.

### **#AST12 PERFORMANCE EVALUATION**

This workshop reviews the history of the performance evaluation process, including contract language, the relationship to salary increases, and its effect on employee performance. Topics covered include the appeals process, the role of the steward including an opportunity to review and critique performance evaluations issued to employees leading to up to the filing for an appeal of a rating of Unsatisfactory." Discussion will include the implications of an unsatisfactory rating and its potential effects on future advancement.

# **LABOR MANAGEMENT COMMITTEE TRAINING**

## **#LMC01 LABOR/MANAGEMENT - NEW COMMITTEES (6 HRS.)**

This workshop is designed for labor/management teams which may be just forming or have a number of new and inexperienced members. Components of this workshop will be exploring the current labor/management contract language, developing specific issues for your team, writing a working agreement, agenda formation, and planning your first meeting. In addition, behaviors and communication skills are explored in an effort to improve the functioning of your team.

## **#LMC02 LABOR/MANAGEMENT (2 1/2 HRS.)**

This workshop is designed to improve the skills of functioning teams. Utilizing scenes from typical PEF workplaces, workshop participants are asked to identify the "problems" and determine their suitability for labor/management. Small groups will develop issues and make presentations at a mock labor/management meeting.

## **#LMC03 LABOR/MANAGEMENT: MISSION STATEMENT (1 1/2 HRS.)**

This 1 1/2-hour workshop will assist committee members in designing a statement of its mission in order to build cohesiveness and agreement on the committee's goals and activities. Committees without operating agreement or mission statements can benefit from the process explored in this offering.

## **#LMC04 JOINT LABOR/MANAGEMENT TRAINING: BEYOND ARMED TRUCE (5 HRS.)**

Designed for functioning joint L/M teams, this workshop allows team members to analyze the needs of the team by comparing their perceptions of each others' behaviors in session with behaviors of highly successful L/M teams. Exploring these perceptions leads to improved functioning of your team as you move on issues brought before you.

## **#LMC05 LABOR/MANAGEMENT - A NEGOTIATION STYLE SURVEY (1 HR.)**

This workshop is designed for participants to explore their negotiation style and how that style relates to the PEF/NYS Article 24 on Labor/Management. Participants will complete a short inventory of negotiation styles and how their style contributes to successes or failures at the Labor/Management table.

## **CIVIL SERVICE ENFORCEMENT STEWARD TRAINING**

### **#CSE01 CIVIL SERVICE I**

This workshop focuses on a discussion of important Civil Service laws and rules governing examinations, eligible lists, appointments, the Rule of Three, upgrades and the reclassifications/reallocation process.

### **#CSE02 CIVIL SERVICE II**

This workshop discusses the various transfer and reassignment mechanisms available under Civil Service Law. The instructor will discuss transfer and reassignment as a method of career mobility and how they can be used to enhance your job security and chances for promotion.

### **#CSE03 EXPOSING THE COST OF CONTRACTING OUT**

This workshop will focus involving more PEF members in our efforts to expose wasteful contracting out by training them to identify and investigate contracting out activities in their agencies, identifying the associated costs and using that information in PEF's anti-privatization campaign. The training will also discuss PEF legislative and political action on contracting out.

## **LEADERSHIP TRAINING PROGRAMS**

### **#LTP01 LEADERSHIP 101**

This workshop has been developed to educate, motivate and inspire new and experienced PEF leaders. It is an interactive workshop that draws upon the ability and experience of the workshop attendees. Almost everyone is a leader at some point in their life but to truly become an effective leader takes time and work. This workshop will put you on the right path. Developed specifically for PEF's future leaders.

## **#LTP02 PARLIAMENTARY PROCEDURES (2 HRS.)**

Better run union meetings don't just happen. They require managerial and communication skills. Learn the processes which can enhance your position as a delegate, council leader, or as a union member. Roberts' Rules are learned through a role play situation and a true-false quiz.

## **#LPT03 CONFLICT RESOLUTION**

Conflict can be a healthy, positive and necessary life force. This workshop will give you new insights and strategies to resolve conflicts at your work site, in your union activities and your day-to-day living experiences. You will have a hands-on experience in conflict resolution as you participate in this role playing workshop.

## **#LPT04 DIVISION FINANCE FOR COUNCIL LEADERS**

This workshop is designed for Division Council Leaders and reviews the responsibilities of the Division, Division Council and Division Treasurer, the proper completion of reports and a discussion of appropriate Division expenses.

## **#LPT05 DIVISION TREASURER TRAINING**

This workshop is designed for Division Treasurers. The workshop will review the responsibilities of Division Treasurers, the proper completion of reports and a discussion of appropriate Division expenses.

## **#LPT06 TEAM BUILDING (2 HRS.)**

Does your team often flounder on getting things done or working together? This workshop is designed to have you develop a team philosophy around which you will then be able to develop courses of action designed for success. The concept of power and conflict is explored as well so group functioning can improve. By clarifying your role, both individually and as a group member, the union can function better.

# MOBILIZATION TRAINING AND SERVICES

**Basic Mobilization Topics-** These topics will cover a basic introduction to organizing, educating and division activity, the three main components of mobilization. All of these topics can be done as individual modules or combined to create a more comprehensive introduction to mobilization.

- #MT101 Mobilization 101**
- #MT102 Charting and Mapping your Workplace**
- #MT103 Orienting Your Mobilizers**
- #MT104 Recruiting Volunteers**

**Advanced Mobilization Topics-** These topics are for divisions who have completed the organizational phase of mobilization and are ready to further educate their members and be prepared for action. All of these topics can be done as individual modules or combined to in a longer format, tailored to your needs. Each workshop delivers a definitive and in-depth understanding of the concepts and tools to implement mobilization in the division.

## **#MT201 Updating Your Workplace Charting and Mapping**

Union leaders often need a way to put members in action quickly, but a good internal network is always helpful. This workshop teaches two of the basic tools necessary for this process, focusing on a systems approach for complete network building and implementation.

## **#MT202 Testing Your Mobilization Network**

Charts and maps of our workplaces are great on paper, but can we actually use these tools to put members in action? This workshop builds on the real-life mobilization network in your workplace and uses a simulation experience to see if your systems are in working order.

## **#MT203 Selecting Issues for Local Work-Place Campaigns**

There is usually no shortage of concerns that members have in their workplace. How do we know if a specific issue is the “right” one to take up? Are there issues that help advance our goals? We provide a format and approach to use in determining how, when, and under what circumstances specific issues should be addressed. We also look at workplace campaign strategies – what works and what doesn’t.

### **#MT204 Using Mobilization to Help Resolve L/M Issues**

This workshop does not replicate L/M training as such, but looks at how union members can utilize certain tactics and strategies in the workplace to help the L/M team accomplish their agenda.

### **#MT205 Running Effective Local Union Meetings**

Nothing can be more deadly than a boring or badly run meeting. Union meetings should always be places where there is energy, focus and good humor. It's not magic, but it does take planning: find out how!

### **#MT206 Communicating our Message: the Use of Flyers, Newsletters, E-Mail, etc.**

We are all bombarded with messages – so how do we make our message “special?” We explore a variety of communication methods and styles in this workshop. It's all very interactive and hands-on...it's all about the practice!

### **#MT207 Developing Allies: Building Community Coalitions**

This workshop builds on the old labor adage, “an injury to one is an injury to all” by examining how labor and community partnerships have resulted in successful campaigns. We discuss the significance of developing relationships and mutual support outside of our own union's borders and provide strategies for long-term alliances.

### **#MT208 Creative Ways to Mobilize the Membership**

Getting members to become involved is a constant challenge. Using a variety of exercises, this workshop explores motivational techniques that can be used at the division level to help interest and engage members in the work of their union. This workshop relies on humor and play as we pursue the serious work of union-building.

**For further information regarding the workshops  
please contact Field Services-Mobilization Department at  
1-800-342-4306 ext.425**

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**PEF OFFERS ON-SITE TRAINING, SEMINARS AND SERVICE STATEWIDE FROM AN EXPERIENCED HEALTH AND SAFETY STAFF**

**TRAINING SESSIONS**

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The PEF Health & Safety Department provides training, information and expertise in the following areas:

- Emergency Preparedness/Emergency Action Plans
- Infectious Diseases (HIV, Hepatitis, TB, Smallpox)
- Needlestick Injury Prevention
- Office Ergonomics
- Violence in the Workplace
- Indoor Environmental Air Quality
- Occupational Stress
- Workers' Compensation
- Bioterrorism Preparedness
- Latex Allergy
- Asbestos
- Right-to-Know/Chemical Awareness
- Back Injury Prevention Ergonomics
- Personal Protective Equipment/Respiratory Protection
- Confined Space
- Environmental Tobacco Smoke
- Strengthening Your Health and Safety Committee

**SERVICES**

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- On-site Training
- Train-the-Trainer Programs
- Building Inspections/Walkthroughs
- Factsheets
- Workers' Compensation Assistance
- Standards and Regulations

The PEF Health and Safety Department has developed fact sheets and booklets on a variety of topics, including:

### FACTSHEETS

- Indoor Environmental Quality
- Accident and Injury Prevention
- Workplace Violence Prevention
- Safety & Ergonomic Hazards in Office Work
- Occupational Stress
- Resolving Indoor Temperature Control Problems
- Fifteen Things Every PEF Leader Should Know About Safety and Health
- Tuberculosis
- NYS Workers' Compensation

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### BOOKLETS

- Emergency Response Guidelines
- Patient Handling Solutions – Directory of Equipment for Patient Transfer and Repositioning Activities
- Needlestick Injury Prevention Solution and Directory of Equipment Manufacturers
- PESH/OSHA Standards
- PESH/OSHA Recordkeeping and Reporting Requirements
- PESH/OSHA Training Requirements
- Laptop Ergonomics Guide
- Workers' Compensation Booklet – Article 13 Committee/GOER
- Workers' Compensation Navigator Book

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**To set up a training program, order materials or for more information  
call the PEF Health & Safety Program  
1-800-342-4306, ext. 254  
or  
518-785-1900, ext. 254**

**New and experienced stewards are urged to attend steward training.  
Call your regional field office for details.  
Access to all other training is through the Education Department at  
(518) 785-1900, ext. 328 or 1-800-342-4306, ext. 328.**

*Updated September 2006*

