

Chairperson Toolbox How to make your job easier

WHAT IS A CHAIRPERSON?

The Chairperson is the SHIELD and SWORD for the UNION



ROLES OF A CHAIRPERSON

- Negotiates the contract
- Enforces the contract (Grievance)
- Representing members in disciplinary hearings
- Deals directly with management
- Keeping members informed
- The Voice



KEY TRAITS TO HAVE AS A CHAIRPERSON

Leadership **Passion** Courage **Mentorship Empathetic Transparency Adaptability** Resiliency Integrity

CHAIRPERSON AS AN ORGANIZER

Develops the active union member

Urge attendance at union meetings

Grows and *keeps* membership

Develops the newly hired employee



Develops leaders in the Local

Is active in local labor council

YOU ARE EQUAL TO MANAGEMENT AS A CHAIRPERSON

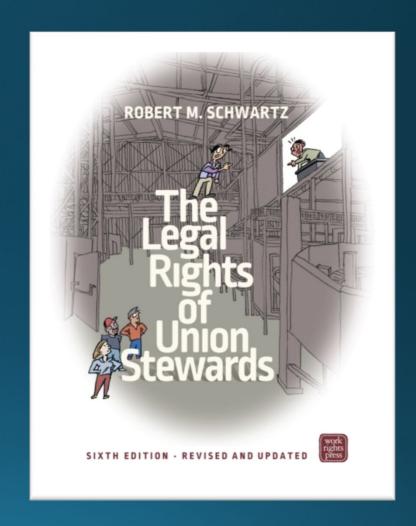
You have the right to:

Investigate

Request information

Challenge unilateral changes

Stand up to the boss!



HOW DO YOU LEARN WHAT YOU NEED TO KNOW?



SMART Local Contract

Chairperson Manual

Union Literature

- Labor Notes Library

labornotes.org

SMART Constitution (Article 21B)

-Sections: 81,82, 87, 88, and 89

Ask mentors or others who know

SMART UNIVERSITY

IMPORTANT DOCUMENTS

Membership Contact Information

Workplace Rules, Policies & Handbooks

Your Collective Bargaining Agreement(s) [CBA]

WHAT IS ONE OF THE BIGGEST MISTAKES A CHAIRPERSON CAN MAKE?

Not Communicate

"Why didn't you call me back?"

Respond to members when possible

OTHER MISTAKES A CHAIRPERSON CAN MAKE

Give out false information

Make promises

Be unprofessional

Not file grievances with merit

Trade grievances for other grievances

Sharing internal disputes

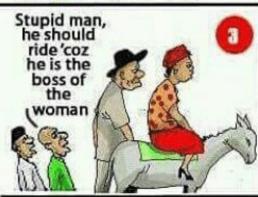
Miss Time-lines

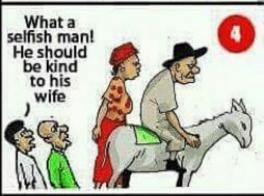
Be Ready for Criticism

THE MAN, THE WIFE, THE DONKEY, AND THE CRITICS











MORAL OF THE STORY

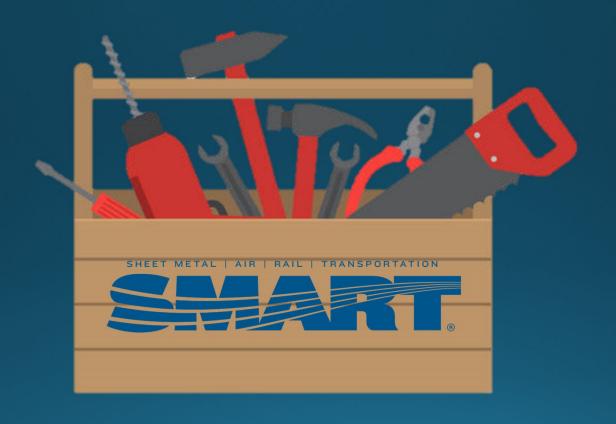
- 1. You cannot please
- everybody.

 2. Whatever you do, there will be people who will criticize you.
- So, just do what you believe is right, and don't be distracted by criticisms.

Group Discussion Scenarios

- 1. How do you get a message out to everyone in your local quickly for important messages?
- 2. How do you get a message out to the public to ask for support during rough contract negotiations?
- 3. In a right to work state or public sector union, a member in your local wants out and convinces others the union is bad. How to handle this situation effectively.
- 4. You have one minute to convince a new hire to join the union. What is your elevator pitch to explain how important it is for them to join the union?
- 5. What kind of style works best when dealing with management? "pounding fist on table style" or "calm assertive style"?
- 6. During a conversation with management, they promised to provide information you requested for a grievance investigation, but time passed without providing it. What should be done?

CHAIRPERSONTOOLBOX



Chairperson Toolbox

Communication

Listen to members

Provide opportunities for involvement

Education

Collaborate with other organizations

Staying Organized



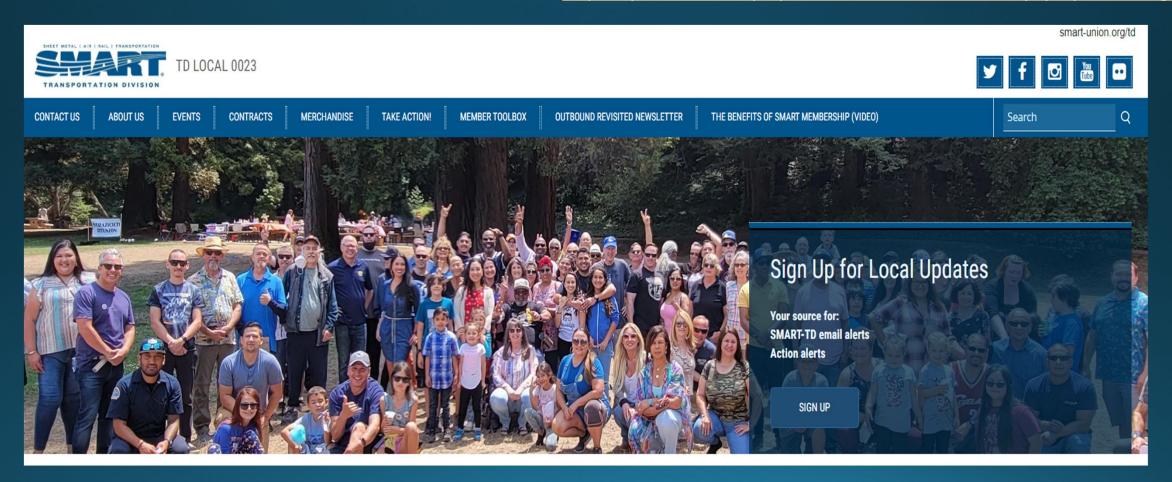


Communication:

Create your own Local's website

AFL-CIO UnionHall Tuturial videos to update your website

https://youtube.com/playlist?list=PL9noZK4TxZ5h-iJPyIqdPyaxmZ794gVIX



Communication: Business Cards



SMART Transportation Division Business Card Order Form

Complete the following form and return it to the attention of the Supply Department. Be certain that you $\underline{\mathbf{TYPE}}$ in order. Handwritten orders will not be accepted.

PLEASE RETURN YOUR CHECK WITH YOUR ORDER

NAME:				
TITLE:				
ADDRESS	:			
CITY:				
STATE:		ZIP:		
		CONTACT INF	<u>o</u>	
BUSINESS	8:			
FAX:				
RESIDEN	CE:			
E-MAIL:				
Cell:				
NUMBER	OF CARDS DESIR	ED:		
PRICE	500 CARDS 1000 CARDS	\$72.00 \$125.00		
		CHECK OUT TO "		
REMARK	S:			
MAIL TO:	SMART TD SUPPI	.Ý DEPT. :LUB BLVD., SUTTE !	130	

This form is also available as a Word document. Please email JShivak@smart-union.org and I will send it to you.

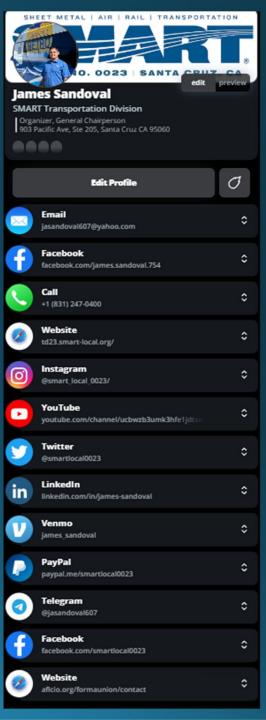
Communication:

Digital Business Card

dotcards.net



NFC reader & QR Code



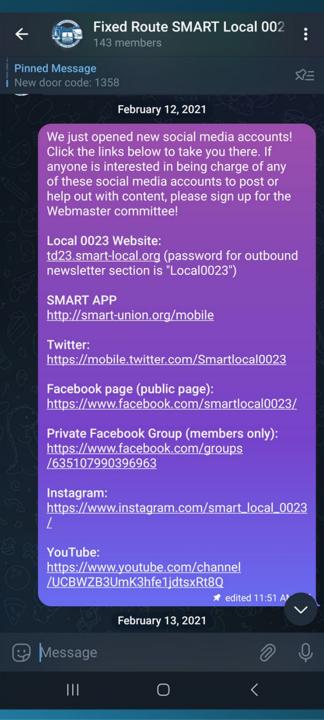
Communication:

Telegram

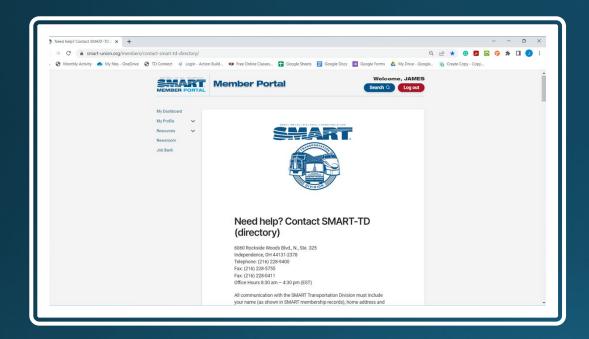


- One-way communication feature for large group
- QR code to join group
- Share PDF
- Polls
- Video and Audio Chat





Communication: SMART Directory



https://smart-union.org/members/contact-smart-td-directory/

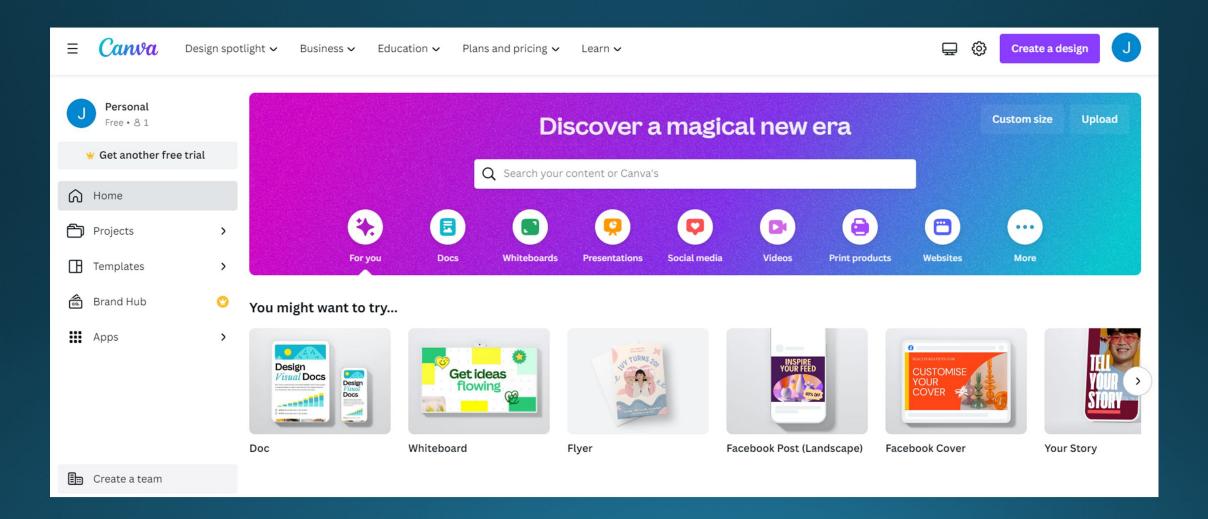
President's Department

This department provides support to the TD President in his duties to provide service and representation to the Transportation Division's thousands of members. It provides information on a diverse array of topics from national health and welfare plans, interpretation of the union constitution, local agreements and the operation of all aspects of the union, such as local administration and bylaws.

QUESTIONS ABOUT CONSTITUTIONAL MATTERS?			~
QUESTIONS ABOUT NATIONAL HEALTH & WELFARE PLANS? QUESTIONS ABOUT YARDMASTERS, ORGANIZING OR BUS DEPARTMENTS?			~
			~
QUESTIONS ABOUT T	D ANNUAL MEET	INGS?	~
QUESTIONS ABOUT L DEPARTMENT?	EGISLATIVE MAT	TERS/NATIONAL LEGISLATIVE	~
QUESTIONS ABOUT PUBLIC RELATIONS?			~
QUESTIONS ABOUT S	MART TD PAC?		~
QUESTIONS ABOUT L	EGAL MATTERS?		^
(subpoenas/legal	counsel)		
Contact	Phone	Email	

Communication:

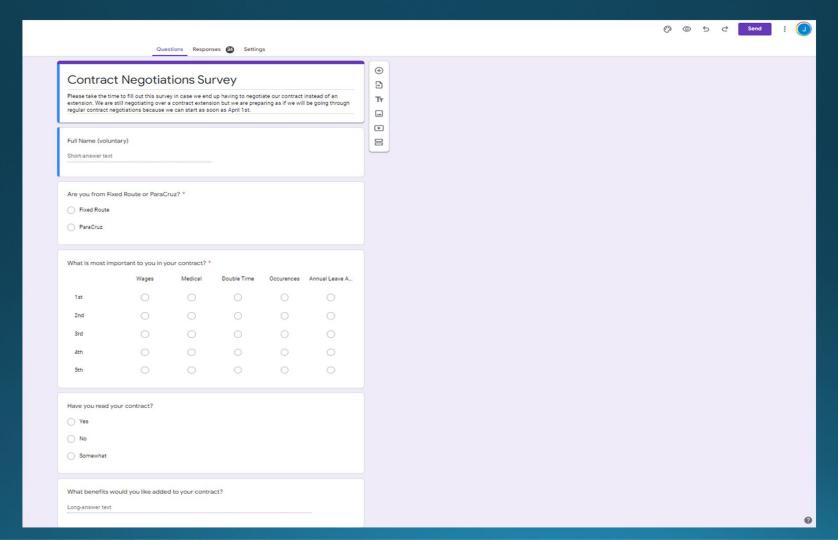
\$12.99 a month \$119.99 a year



Listen to members:

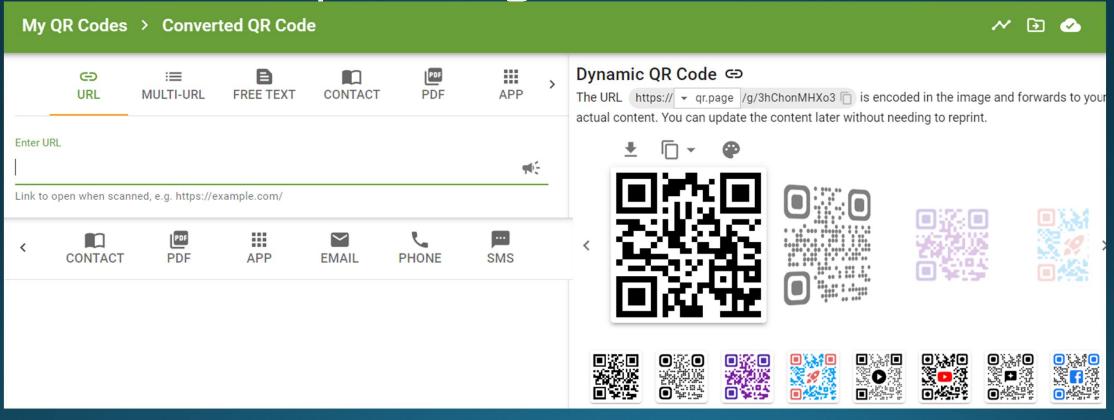
Google Forms





Provide opportunities for involvement:

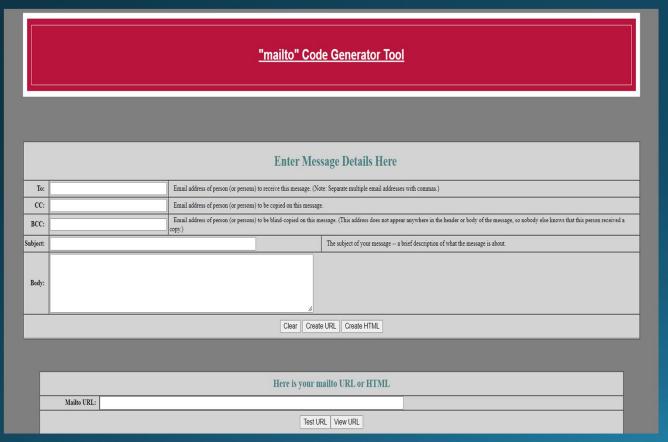
www.the-qrcode-generator.com/



Provide opportunities for involvement:

Code Generator Tool

- https://cha4mot.com/t mailto.html
- One-click message campaigns where people can click on a link to send an email.



Tiny URL allows
 users to create
 smaller URLs to use
 the "Code
 Generator Tool

tinyurl.com/app



We are the SMART Transportation Union (formerly known as the United Transportation Union or UTU).

Our Local 0023 is out of Santa Cruz, CA. We represent the Bus & Paratransit Operators at Santa Cruz Metro.

(If you are on your mobile phone, our menu tab is in the top right corner or turn your phone sideways. You can also find the menu tabs if you scroll to the bottom)

Follow us on Facebook, Instagram, Twitter, and YouTube! Click the icons above to take you there.



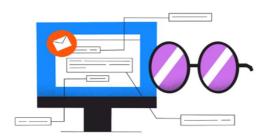
Provide opportunities for involvement:



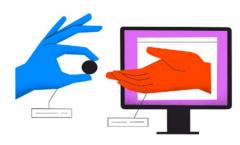
actionnetwork.org



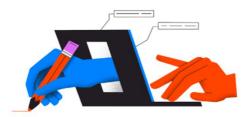
Mobile Messaging →



Email ->



Fundraising ->



Petitions ->



Events ->



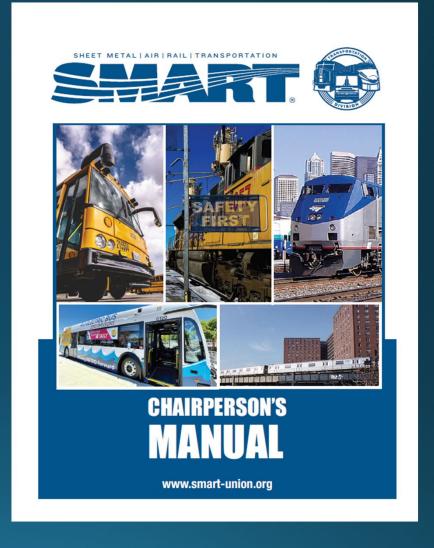
Automation ->

Your Properties Collective Bargaining Agreement



The collective bargaining agreement is the number one union book to be familiar with

Bus Chairperson's Manual



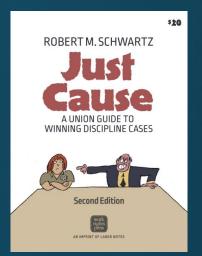
Can be found in SMART University

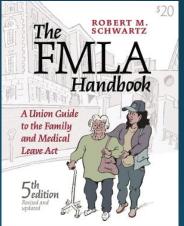
Books to learn more:

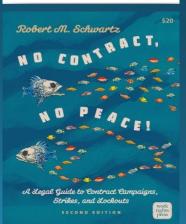
 Just Cause – A union guide to winning discipline cases https://labornotes.org/store/just-cause

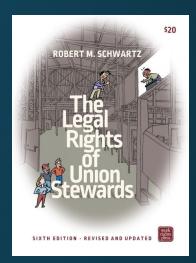
(You can request the full NLRB & Arbitration cases in back of book from labornotes.com)

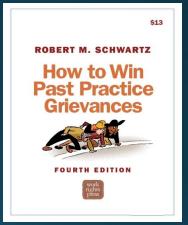
- The legal rights of union stewards
 https://labornotes.org/store/legal-rights-union-stewards
- FMLA Handbook
 https://labornotes.org/store/fmla-handbook
- How to win past practice grievances
 https://labornotes.org/store/how-win-past-practice-grievances
- No contract, No peace!
 https://labornotes.org/store/no-contract-no-peace
- The Labor Law sourcebook
 https://labornotes.org/store/labor-law-source-book

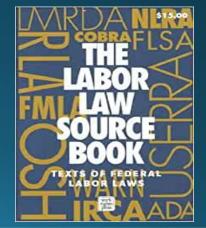






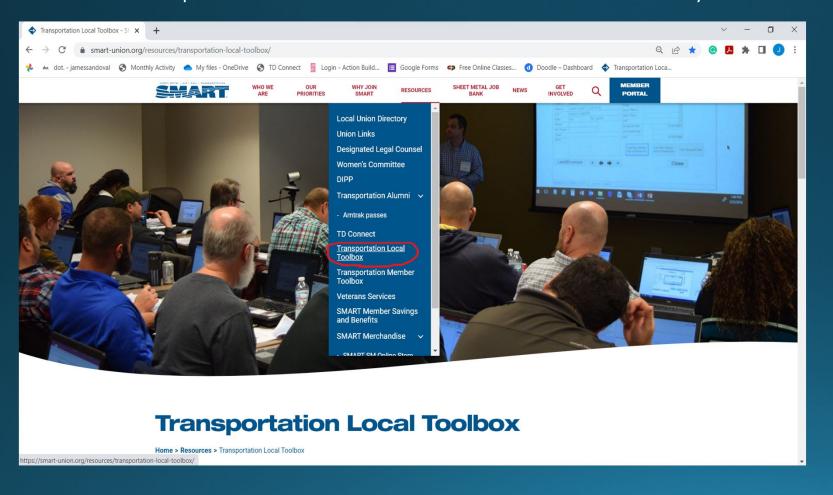






smart-union.org

Go to the "Transportation Local Toolbox" on our website to find many resources



Transportation Local Toolbox

WHO WE OUR WHY JOIN RESOURCES SHEET METAL JOB NEWS GET Q PORTAL

fome > Resources > Transportation Local Toolb

The purpose of this page is to assist SMART Transportation Division local leaders with the duties of their offices.

2022 Treasurer's Month to Month guide (PDF): The No. 1 resource for a local S&T!

Use the above guide along with the Task List form in WinStabs NMR to track when task are completed

leed to schedule a session with the Local Support Help Desk?

Important notices to Local S&Ts

- After hours help desk appouncement (PDF)
- . Locals may hold meetings pursuant to guidelines (PDF)
- January 2021 Billed Amount Updates (TD dues, DIPP
 Local Expense Claim Form (Fillable PDF)
- Local Expense Claim Form (COVID-19) (Filable PDF)

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INSURANCE/PAC/DIPP INFO & FORMS	,
WINSTABS NMR	
BUDGET & RECORD KEEPING	
DISBURSEMENTS	
LOCAL GOVERNANCE	
BANKING	

How to get help

MEMO/POLICY DIRECTIVES

PAYROLL TAXES

REQUIRED REPORTING

ELECTIONS

We hope you find these tools helpful in fulfilling your duties and welcome your comments on how the SMART Transportation Division could further assist you. If you have any questions about working eBIII or Member Records in TD Connect, <u>contact your Local's</u> <u>Membership Representatives team</u>:

The Local Support Help Desk also is available to help with questions about:

- Secretary/Treasurer duti
- Regulatory compliance
- Fund maintenance
 WinStabs
- Paying taxes
- Filing taxes and other reports
- Disbursements
- Paper billing process (from 2018 and older)

ONLINE APPOINTMENTS	
PHONE OR EMAIL	
AFTER HOURS HELP DESK SUPPORT	
WANT TO SUBMIT YOUR LOCAL'S FORMS ELECTRONICALLY?	
QUESTIONS ABOUT SUBMITTING REPORTS TO THE TD OFFICE?	
TEAM VIEWER QUICK LINKS	

SMART University



Member Portal

Welcome, JAMES

Search Q



My Dashboard

My Profile

Resources

Newsroom

Job Bank



TD — SMART University: Membership 101

Full SMART University site for officer training links

Benefits of Membership | Local Meeting Basics
Local Officer Duties | Tips to Survive a Hearing/Investigation | Penalty Claims
Safety Reporting | RR: Critical Incident Guide

Officer Training Classroom





a responsibility that comes with a learning curve. Choose your role to find the tools you need to learn the ropes and







Bus Tutorials



: General or Local Chairpersons



For: General or Local Chairpersons



For: General or Local Chairpersons



For: General or Local Chairpersons



Resource Documents

Chairperson's Manual

Click to view or Download

Useful Resources

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Documents You're Entitled to Request

Click to view or Download







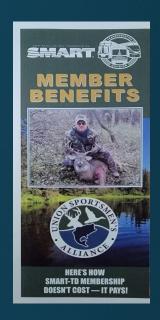
Education: Organizing/New Hire Kits

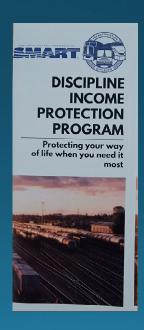


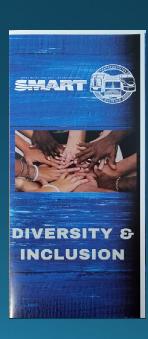


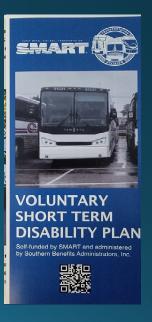












New Hire PowerPoints during Orientation







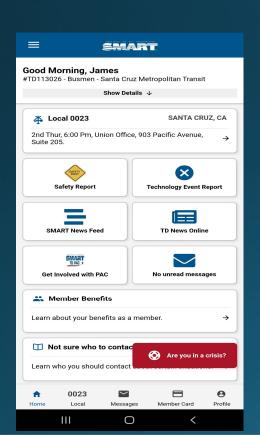


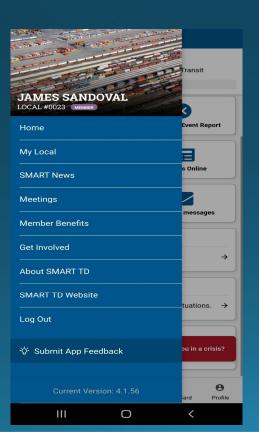




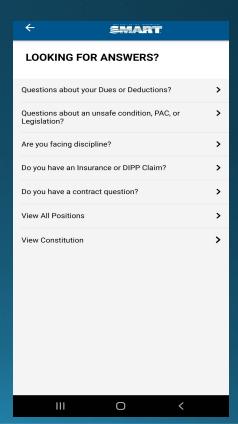
SMART APP







- Officer contact Information
- Local meeting date and time
- Benefit Information
- SMART News
- Breakdown of your dues



LABORNOTES

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Online Workshops





labornotes.org

UNION Bullseye

So, where do you land?



THE CORE:

Members who are always thinking about organizing our members and how to get others involved by sharing ideas on how to make our union stronger and run for officer

THE ACTIVISTS:

Members who can be counted on to help when needed. They get involved, help get the word out, and recruit

THE SUPPORTERS:

Members who will come to meetings, vote, wear union merchandise, stay informed and don't fall for rumors. They ask questions, know our contract, fill out surveys and sign petitions, but don't take responsibility for getting others involved.

THE DISENGAGED:

These members don't see the relevance of the union in their lives. They don't care to know what is going on with the union and they don't participate. They tend to see themselves as too busy to be involved with the union and rely on the core members to pull the weight of responsibility.

team players, these

people are outside the circle, creating rumors and division within our membership with no intention of being supporters, activists, or core members of the union.

THE HOSTILE: Not

YOU are the UNION...

and a union's true strength comes from the loyalty and devotion of all of us. Good officers and a sound financial structure are essential, but YOU

determine the success of your union.

Help make your union stronger, and it will serve you more effectively!

It is this simple:

WEAK Contract ◀ Weak Union ◀ Hostility ◀ The Union ▶ Solidarity ▶ Strong Union ▶ STRONG Contract

Let's commit to being CORE members!



Special credit to Labor Notes (labornotes.org) for some of this content

Collaborate with other Organizations:

AFL-CIO aflcio.org

The American Federation of Labor and Congress of Industrial Organizations (AFL–CIO) is the largest federation of unions in the United States.



Local Labor Council Across the U.S

https://www.afge.org/take-action/find-your-clc/clc-map/



State Federations

aflcio.org/about-us/our-unions-and-allies/state-federations-and-central-labor-councils

State Federations and Central Labor Councils

State federations and central labor councils are the heart of the movement. These loc organizations partner with state and community organizations and conduct state, locd national campaigns to improve the lives of working families. Get connected with the movement in your area now.

ALABAMA	ALASKA	ARIZONA	ARKANSAS
CALIFORNIA	COLORADO	CONNECTICUT	DELAWARE
DISTRICT OF COLUMBIA	FLORIDA	GEORGIA	HAWAII
IDAHO	ILLINOIS	INDIANA	IOWA
KANSAS	KENTUCKY	LOUISIANA	MAINE
MARYLAND	MASSACHUSETTS	MICHIGAN	MINNESOTA
MISSISSIPPI	MISSOURI	MONTANA	NEBRASKA
NEVADA	NEW HAMPSHIRE	NEW JERSEY	NEW MEXICO
NEW YORK	NORTH CAROLINA	NORTH DAKOTA	OHIO
OKLAHOMA	OREGON	PENNSYLVANIA	PUERTO RICO
RHODE ISLAND	SOUTH CAROLINA	SOUTH DAKOTA	TENNESSEE
TEXAS	UTAH	VERMONT	VIRGINIA
WASHINGTON	WEST VIRGINIA	WISCONSIN	WYOMING

Staying Organized: ilovepdf.com

Every tool you need to work with PDFs in one place

Every tool you need to use PDFs, at your fingertips. All are 100% FREE and easy to use! Merge, split, compress, convert, rotate, unlock and watermark PDFs with just a few clicks.



Merge PDI

Combine PDFs in the order you want with the easiest PDF merger



Split PD

Separate one page or a whole set for easy conversion into independent PDF files



Compress PDF

Reduce file size while optimizing for maximal PDF quality.



PDF to Word

Easily convert your PDF files into easy to edit DOC and DOCX documents. The converted WORD document is almost 100% accurate.



PDF to Powerpoint

Turn your PDF files into easy to edit PPT and PPTX slideshows.



PDF to Excel

Pull data straight from PDFs into Excel spreadsheets in a few short



Word to PDF

Make DOC and DOCX files easy to read by converting them to PDF.



Powerpoint to PDF

Make PPT and PPTX slideshows easy to view by converting them to



Excel to PDF

Make EXCEL spreadsheets easy to read by converting them to PDF.



Edit PDF

Add text, images, shapes or freehand annotations to a PDF document. Edit the size, font, and color of the added content.



PDF to JPG

Convert each PDF page into a JPG or extract all images contained in



JPG to PDF

Convert JPG images to PDF in seconds. Easily adjust orientation and



Sign PDF

Sign a document and request signatures. Draw your signature or sign PDF files with a certificate-based digital ID.



Watermark

Stamp an image or text over your PDF in seconds. Choose the typography, transparency and position.



Rotate PDF

Rotate your PDFs the way you need them. You can even rotate multiple PDFs at once!



HTML to PDF

Convert webpages in HTML to PDF. Copy and paste the URL of the page you want and convert it to PDF with a click.



Unlock PDF

Remove PDF password security, giving you the freedom to use your PDFs as you want.



Protect PDF

Protect PDF files with a password. Encrypt PDF documents to prevent unauthorized access.



Organize PDF

Sort pages of your PDF file however you like. Delete PDF pages or add PDF pages to your document at your convenience.



PDF to PDF/A

Transform your PDF to PDF/A, the ISO-standardized version of PDF for long-term archiving. Your PDF will preserve formatting when accessed in the future.



Repair PDF

Repair a damaged PDF and recover data from corrupt PDF, Fix PDF files with our Repair tool.



Page numbers

Add page numbers into PDFs with ease. Choose your positions, dimensions, typography.



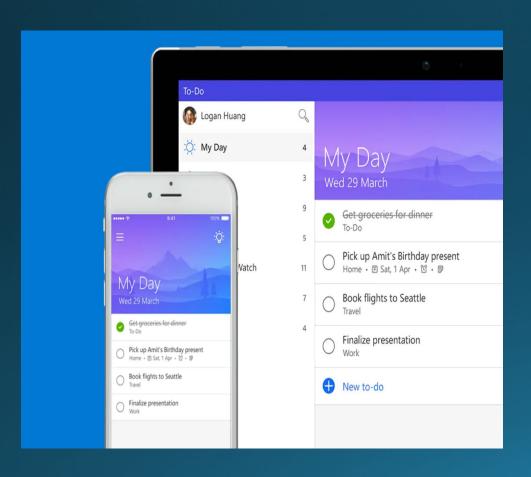
Scan to PDF

Capture document scans from your mobile device and send them instantly to your browser.

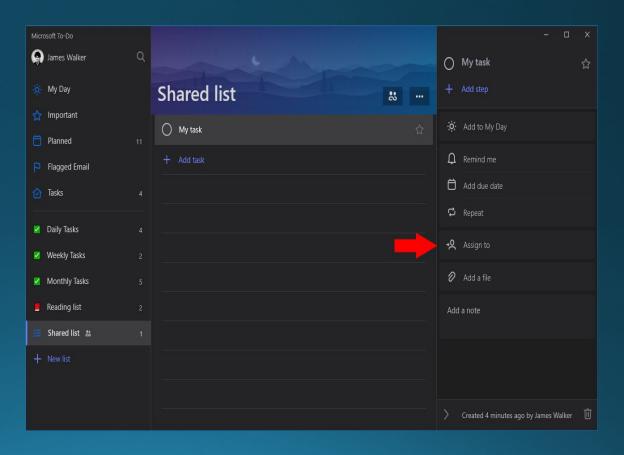


Microsoft To-Do



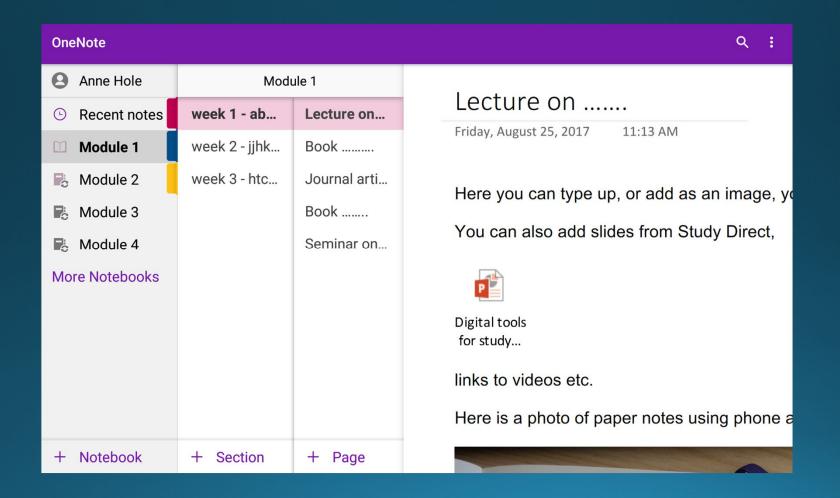


- Organize all your tasks
- Access your tasks from phone or compute
- Shared task list with team members



Staying Organized: OneNote

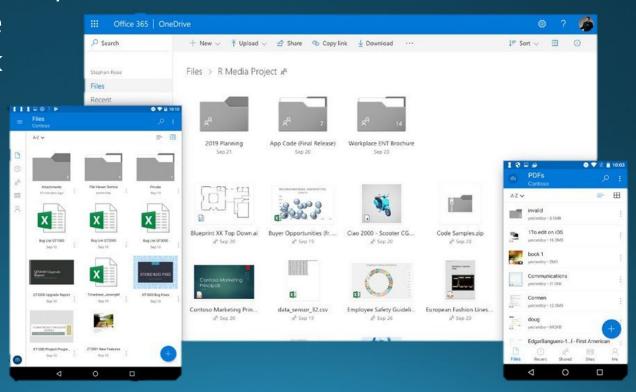
- Time-stamped notes from your phone or computer
- You can create shared folders with your team members.



OneDrive Google Drive 🔼



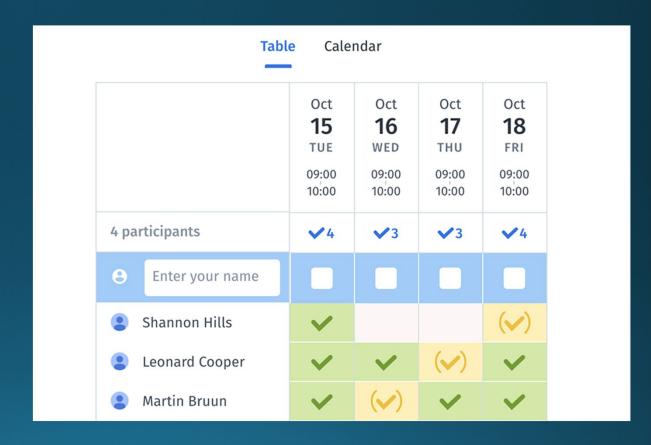
- Save all your files
- Access your files from phone and computer
- Scan documents from your phone
- Create sharable folders with a link



Doodle

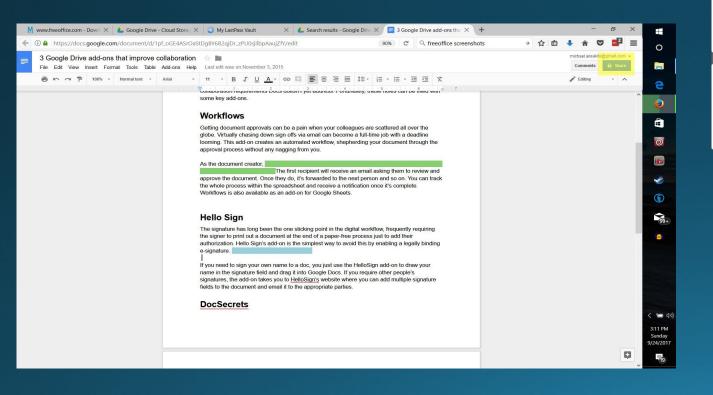
Professional scheduling made easy

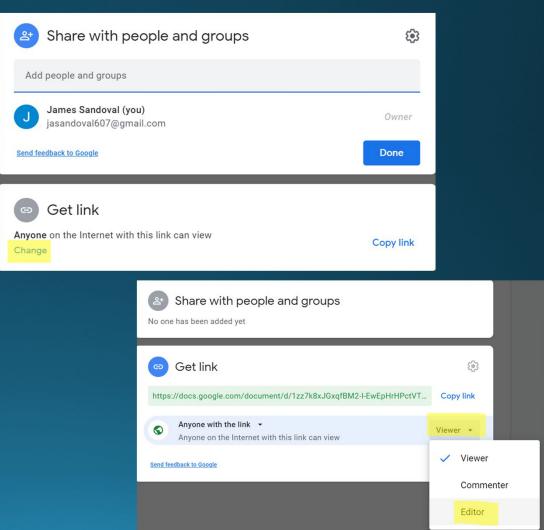
Doodle is a fast and easy way to find out people's availability to schedule a meeting



Staying Organized: Google Docs

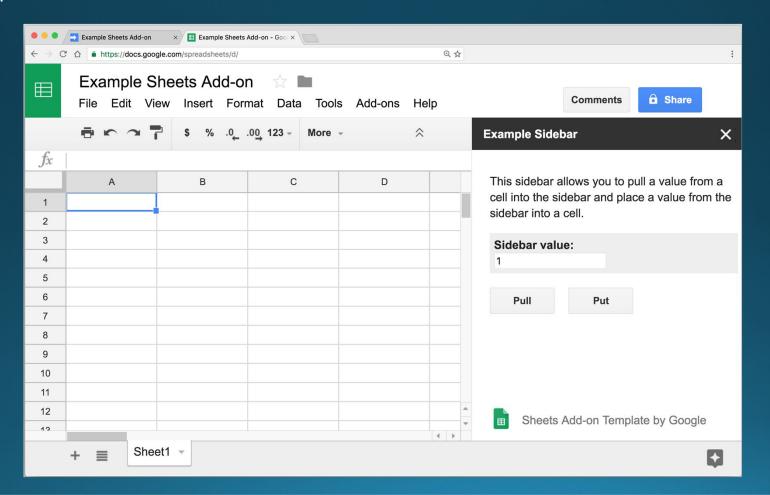
- Collaborate on a live document with others
- Access document from phone or computer





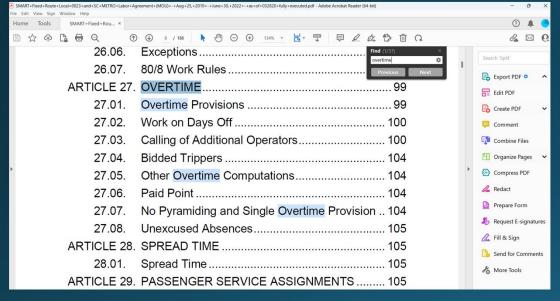
Staying Organized: Google Sheets

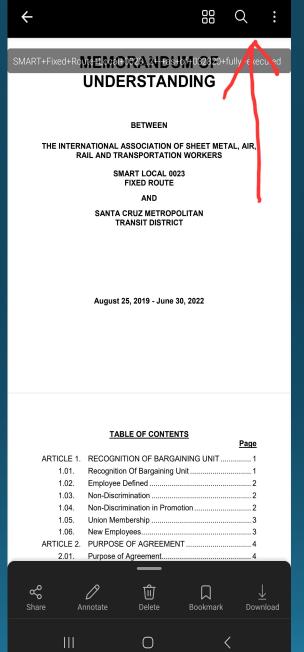
Collaborative Spread Sheets



Keyword search PDFs on phone or laptop

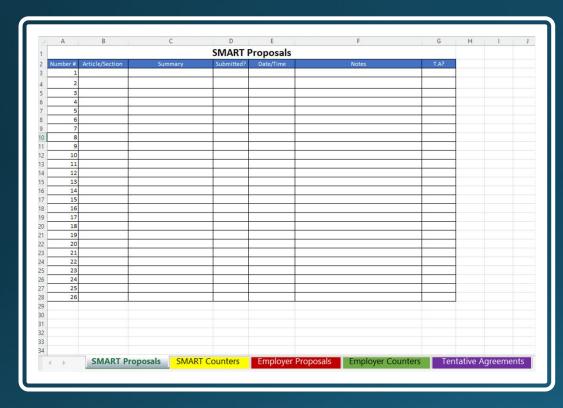
Ctrl + F

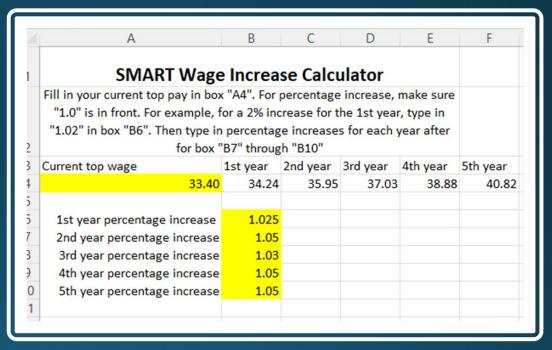




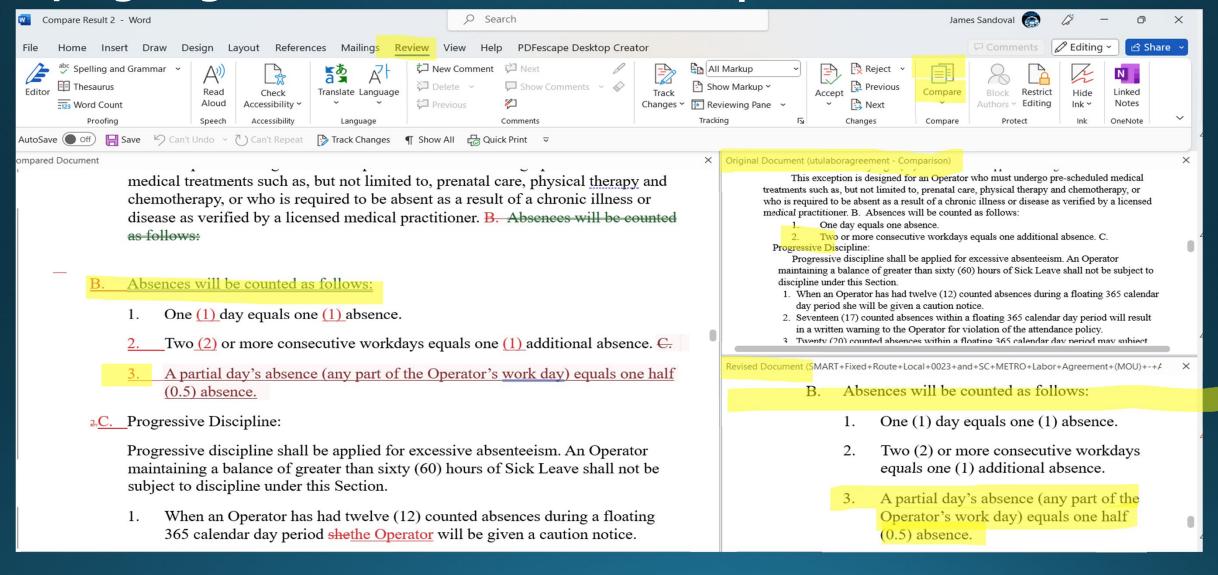
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Tools for Contract Negotiations





Compare Documents



Word also has a feature to where you can compare two documents and it will extract all differences

- "Review" Tab then select "Compare"

Useful Information and Resources Document



Useful Information & Resources

Must-read Union books:

Your Properties Collective Bargaining Agreement

Just Cause - A union guide to winning discipline cases

https://labornotes.org/store/just-cause

The legal rights of union stewards

https://labornotes.org/store/legal-rights-union-stewards

How to win past practice grievances

https://labornotes.org/store/how-win-past-practice-grievances

No contract, No peace!

https://labornotes.org/store/no-contract-no-peace

FMLA Handbook

https://labornotes.org/store/fmla-handbook

The Labor Law sourcebook

https://labornotes.org/store/labor-law-source-book

The Union Steward's Complete Guide. A survival manual.

https://labornotes.org/store/union-stewards-complete-guide-3rd-edition

More books:

https://labornotes.org/store/books

Useful Websites/Apps SMART TD

SMART TD Website

https://smart-union.org/

· Find many useful documents, trainings, templates, etc.

SMART University

https://smwia.sharepoint.com/sites/SMARTUniversity

- Training videos for officers
- Member educational videos
- . Templates and Resources

SMART TD APP

http://smart-union.org/mobile

- . Find out who your local union officers are & contact them
- · Find out when and where your local meeting i
- Find out what benefits are available, including insurance, and discounts exclusive to SMART-TD members
- Access SMART news and related articles.
- · Report an unsafe work condition
- Get answers and know who to contact when questions and issues arise.
- · Plus, a breakdown of your dues and much more

SMART New Hire Kits

- SMART New hire kits have applications, dues authorization forms,
- informational trifolds, SMART merch, etc.
- Request New Hire Kits from the SMART TD supply department.

SMART Director

https://smart-union.org/members/contact-smart-td-directory/

IT IS POSSIBLE FOR YOU TO LEARN HOW TO USE THESE TOOLS!







TIPS



- Take good notes
- Always leave a paper trail
- Follow up emails
- Keep a record of EVERYTHING
- Jab, punch, upper cut method
- NEVER stop learning
- Keep members well informed
- Do not give up

Any Questions?

• All SMART University modules or for training and guidance purposes only. While all locals, committees and boards must operate within the SMART Constitution and follow applicable State and Federal Laws, they may function in a manner that is slightly different. Therefore, if questions arise, please contact your Local officers, General Chairmen or State Director of jurisdiction if clarity is needed.

