

WORKSHOPS SCHEDULE

NALC officers and staff, along with outside experts, will present more than 45 workshops over the convention week.

The grid below offers attendees an

easy way to see what classes are available when. Full descriptions of the workshops follow on the next several pages.

Classes are offered before the convention is called to order each day and after

each day's business is done.

Seating is on a first-come, first-served basis, and the rooms have been known to get crowded. Convention delegates are encouraged to arrive early. **PR**

MONDAY (7/21)	TUESDAY (7/22)	WEDNESDAY (7/23)	THURSDAY (7/24)	FRIDAY (7/25)
MORNING Social Security City Delivery <i>This class repeats on Tuesday.</i> Effective Branch Communications Processing Grievances—Start to Finish <i>This class repeats on Friday.</i> NALC Constitution, Elections and Bylaws	MORNING The Postal Service in 2025 Trustees Training City Delivery <i>Same as Monday morning.</i> NALC Health Benefit Plan—101 Mutual Benefit Association: The Fourth Quarter	MORNING FERS, CSRS and CSRS Offset Women and Leadership Route Adjustments Safety and Health—We All Must Get Involved CAU Briefing and Q-and-A <i>This class repeats on Thursday.</i>	MORNING New Fiduciary Officer Training: What You Need to Know About Finance, Membership and Record-Keeping Filling Full-Time Regular Opportunities—M-01834 <i>This class repeats on Friday.</i> Suicide Prevention How To Influence Congress: An Insiders Panel CAU Briefing and Q-and-A <i>Same as Wednesday morning.</i>	MORNING NALC Activists Deliver the Message <i>Same as Thursday afternoon.</i> Filling Full-Time Regular Opportunities—M-01834 <i>Same as Thursday morning.</i> Branch Secretary-Treasurer Training: Dos and Don'ts Processing Grievances—Start to Finish <i>Same as Monday morning.</i> Branch and State Retirement Directors The Strike at 40
AFTERNOON Shop Steward Training School <i>Part 1 of 4.</i> NALC and the Muscular Dystrophy Association: Providing Help and Hope Critical Incident Stress Management NALC and Capitol Hill Take 5 for Your Future: Investing in the Thrift Savings Plan Managing Branch Finance—A Study of Basic Operations	AFTERNOON Shop Steward Training School <i>Part 2 of 4.</i> Community and Membership Outreach Building NALC's Legislative and Political Power Three Ways to be Appealing—Appealing OWCP Denials <i>This class repeats on Thursday.</i> Understanding the LM-3	AFTERNOON Shop Steward Training School <i>Part 3 of 4.</i> Common Sense Economics Hard Travelin' with Woody Letter Carrier Food Drive Communicating Our Message	AFTERNOON Shop Steward Training School <i>Part 4 of 4.</i> NALC Activists Deliver the Message <i>This class repeats on Friday.</i> Getting In—College Planning for Letter Carriers and their Children Emerging Trends in International Postal Services Three Ways to be Appealing—Appealing OWCP Denials <i>Same as Tuesday afternoon.</i>	

MONDAY MORNING

Social Security

More than 90 percent of all current postal and federal employees are covered by the Federal Employees Retirement System (FERS). Social Security is a major component of the total package of FERS retirement benefits. In 2012, the Social Security Trust Fund had income of \$840.2 billion, outgo of \$785.8 billion, and an end-of-year balance of \$2,732.3 billion. A representative from Social Security headquarters will present information.

City Delivery

Director of City Delivery Brian Renfroe and his staff will provide updates and information on various city delivery issues such as city carrier assistant (CCA) contractual issues; Article 12 withholding and excessing; safety and service reviews; scanners and other new technology; Sunday parcel delivery; training for new letter carriers, and city/rural territory disputes. **This class repeats on Tuesday.**

Effective Branch Communications

Branch publications, both traditional print and web-based electronic, can be a formidable force for informing and activating NALC members. This workshop will provide tips for producing first-class, direct-to-the-member communications. Designer/Web Editor Mike Shea, Internet Communications Coordinator Joe Conway and Writer/Editor Rick Hodges will discuss ways of improving websites and e-mail newsletters, effectively using social media and sharpening the focus and effectiveness of conventional newsletters and traditional communications strategies. NALC's Branch Publication Competition winners will be announced at this workshop.

Processing Grievances—Start to Finish

This workshop is for both new and experienced shop stewards/Formal A representatives who process grievances at the local level, starting with the investigating of potential grievances through the appeal to Step B and beyond. This class will introduce the new *NALC Shop Steward's Guide* and cover how to use the NALC Grievance Starters, as well as preview other related tools in the works. The workshop is led by Vice President Lew Drass and Contract Administration Unit staff. **This class repeats on Friday.**

NALC Constitution, Elections and Bylaws

This workshop is designed to assist NALC branches and state associations with the rules and regulations governing the conduct of elections and the process for creating and amending bylaws. The workshop will also cover common problems with bylaws and how to get that stamp of approval from the Committee of Laws.

AFTERNOON

NALC and the Muscular Dystrophy Association: Providing Help and Hope

In 1952, NALC made a promise that we would be with MDA until a cure is found. That promise continues to this day. This workshop will cover how to be successful with muscle walks, the benefits of MDA summer camps and why you should be involved. MDA's 2014 Goodwill Ambassador Reagan Imhoff is scheduled to attend and talk about the importance of MDA in her life and in the lives of so many other children.

Critical Incident Stress Management

Tornadoes, hurricanes, fires, assaults on letter carriers, robberies and suicides—local NALC leaders, stewards and letter carriers often find themselves in extremely difficult situations. We must assess the circumstances, provide counsel or direction for immediate assistance and deal with the short- and long-term physical, emotional and financial aftermath to our members and their families. With the help of Employee Assistance Program National Director Bob McCullough, this training will prepare you to better navigate through traumatic situations, educate you on available resources, and help you to create a plan of preparation that will benefit you, your membership and those you care about.

Shop Steward Training School

This four-day class will cover all aspects of the grievance procedure from the investigation of an incident through the arbitration of a grievance. The classes will be offered each afternoon Monday through Thursday and are open to all stewards, new or experienced, as well as anyone interested in learning more about the grievance procedure and what a steward does. As the class progresses through the week, stewards will learn about the various aspects of handling grievances from investigating, preparing and presenting

grievances at Informal A, Formal A and Step B of the grievance procedure as well as what happens when a case goes to arbitration.

To make the theoretical practical, the class will follow a specific disciplinary case where a letter carrier was accused of theft as it proceeds through the grievance procedure to arbitration. A cast of NALC Headquarters staff and experienced stewards, advocates and trainers from around the country will present a series of scenes depicting the various stages of this grievance. Attendees will receive a grievance file folder on Monday and will be given handouts each day to add to their folder as the week progresses.

Monday's class will focus on the basics of the grievance procedure and steward rights. As these are discussed, students will observe the steward representing the carrier during his interrogation by agents of the Office of the Inspector General (OIG) and steps the carrier and the steward take following his arrest.

On **Tuesday**, the class will cover how to thoroughly investigate a grievance and how to prepare and present a grievance at Informal Step A. The steward in our theft case begins his investigation by interviewing various witnesses and officials and requesting documentation from the Postal Service, OIG and the local police department as he prepares the grievance for Informal Step A and holds the meeting.

Wednesday's class will include how to prepare and present a case at Formal Step A as well as make the appeal to Step B. As these topics are covered, the theft case will move through the Formal Step A and Step B meetings and ultimately be appealed by the NBA to arbitration.

On **Thursday**, the class will be devoted solely to the presentation of a live mock arbitration of the theft case. Students will observe the union and management advocates present opening statements to the arbitrator, direct and cross-examine witnesses and offer closing arguments as they use the evidence and arguments that were developed in the case. At the conclusion of the hearing, the arbitrator will render a decision on the case and explain how the evidence that was developed during the processing of the case and presented at the hearing affected the result. Although it is not required, it is recommended that delegates attending the steward school try to be present each day to experience the entire course.

NALC and Capitol Hill

NALC Director of Legislative and Political Affairs Kori Blalock Keller will give an overview of activity on Congress' overall agenda for the remainder of this legisla-

tive year. We will take an in-depth look at postal reform and discuss hurdles, roadblocks and prospects for passage. We will discuss messaging and how to change the conversation on the Hill regarding the Postal Service. In addition, we will discuss the political landscape and its impact on congressional activity.

Take 5 for Your Future: Investing in the Thrift Savings Plan

The workshop will be hosted by Jim Courtney, the director of the Office of Communications and Education at the Federal Retirement Thrift Investment Board. It will highlight a new educational program to promote participation in the Thrift Savings Plan developed by the agency that manages the Plan. The *Take 5 for Your Future* program provides TSP participants with new resources on the TSP's website, including new instructional videos and tools for retirement planning. The program will show participants how they can take advantage of the TSP's five core funds and five lifecycle funds. Courtney and other Thrift Board representatives will also be available to answer questions from convention delegates about the Thrift Savings Plan.

Managing Branch Finance— A Study of Basic Operations

This workshop will focus on the proper division of responsibility within the branch for financial matters and will discuss the authorizations and protocols that should be used by branch officers as they discharge their responsibilities under the *NALC Constitution* and the Labor Management Reporting and Disclosure Act of 1959. Topics covered will include the authorization to spend branch funds, the proper process for the receipt and disbursement of branch money, the role and responsibility of each branch officer, reporting to the membership and the regulatory agencies, establishing checks and balances, avoiding conflicts of interest and understanding the role of the branch trustees.

TUESDAY MORNING

The Postal Service in 2025

NALC Chief of Staff Jim Sauber and Director of Research Jim Holland will discuss the outlook for the U.S. Postal Service. They will examine industry trends and technological developments that affect demand for postal services, both positively and negatively. The NALC staffers will also look ahead to what the Postal

Service will look like in the year 2025. The emerging trends in e-commerce, the potential for new services, including postal banking, and the fate of traditional letter mail will be discussed. The workshop will engage delegates to think about how the work of letter carriers and the strategies of our union must evolve over time.

Trustees Training

Under the *NALC Constitution*, branch trustees are required to “examine and report to the branch the condition of the books of the officers at least once very six months,” but many local trustees lack a clear understanding of all the intricacies their duties entail. National Board of Trustees Chairman Larry Brown and National Trustees Randy Keller and Mike Gill will provide local trustees with information and a variety of tools they need to keep their branches on the right track. Among the topics covered will be getting ready for an audit, receipts and disbursements, Labor Management Reporting and Disclosure Act requirements, and overall union finances.

City Delivery

Same as Monday morning.

NALC Health Benefit Plan— 101

Learn how to get the most from your health insurance plan. HBP Director Brian Hellman and Plan staff will provide details on the general health plan, current benefits and website updates. Included in the current benefit details will be information regarding the CDHP and Value Option plans added in 2014. A question-and-answer period will follow the presentation. Tickets are not required; however, seating will be on a first-come basis.

Mutual Benefit Association: The Fourth Quarter

MBA Director Myra Warren will present a workshop on planning for the fourth quarter of life. This workshop will provide valuable information on topics such as planning for incapacity for property, planning for health incapacity, wills, living trusts, letters of instruction, funeral and burial issues, beneficiary designations, and digital lives and legacies. The educational workshop will provide useful information on how to prepare early and properly for end-of-life events. This information is not only beneficial to the letter carriers, but also family members. MBA staff members will be available to answer questions on the products available.

AFTERNOON

Community and Membership Outreach

Letter carriers are the heart and soul of their communities. Our reach is unmatched, as are our willingness and ability to make a difference in the lives of those in the neighborhoods we serve. This workshop will cover a brief overview of all areas of the NALC's community services, as well as what the AFL-CIO does, as related by AFL-CIO Community Services Director Will Fischer. Then we'll connect that work of goodwill to the many ways it can be used to organize and boost the morale of your branch, help build valuable partnerships with other community groups and organizations, and maintain the long letter carrier history as the most trusted government workers.

Shop Steward Training School

On **Tuesday**, the class will cover how to thoroughly investigate a grievance and how to prepare and present a grievance at Informal Step A. The steward in our theft case begins his investigation by interviewing various witnesses and officials and requesting documentation from the Postal Service, OIG and the local police department as he prepares the grievance for Informal Step A and holds the meeting.

Building NALC's Legislative and Political Power

The mission of NALC's political action committee (PAC) is to improve the lives of letter carriers. NALC's activists and leaders need the tools to encourage letter carriers to become PAC members to ensure NALC's collective voice is loud and our policy positions are heard. This workshop will focus on messaging best practices, fundraising tactics and general guidelines to build a PAC program in your branch.

Three Ways to be Appealing —Appealing OWCP Denials

Just because OWCP has denied a claim, that doesn't end the process. Kevin Card from the NALC Workers' Compensation Department will discuss the ins and outs of the OWCP appeal process. Learn how to successfully prepare an appeal to Hearings and Review, Reconsideration and the Employees Compensation Appeals Board. **This class repeats on Thursday.**

Understanding the LM-3

This class will help participants understand and complete the Form LM-3. David Dorsey, president of Bond Beebe Accountants and

Advisors, will review the form with participants to determine what information the Department of Labor is really asking for and what details must be included with the answers. Among the areas to be covered are the proper way to complete Item 24, listing all officers and disbursements to officers, and where to report different kinds of receipts and disbursements. A completed LM-3 for a hypothetical branch will be distributed to help branch leaders in preparing and reviewing their own branch LM-3 filing. Dorsey will stay after class to answer individual questions and concerns.

WEDNESDAY MORNING

FERS, CSRS and CSRS Offset

A recent Congressional Research Service analysis showed the following data regarding the Civil Service Retirement and Disability Fund: \$94.8 billion collected from current FERS and CSRS employees' paychecks (and agency contributions) in FY 2012; \$73.9 billion paid in pensions to retired FERS and CSRS employees (and Fund expenses) in FY 2012; \$829.1 billion in assets in the Fund at the end of FY 2012. We are talking about real money here. If you are retired, you have a vested interest in knowing about the state of the CSRDF. If you plan or hope to retire someday, you also have a vested interest in knowing about the state of the CSRDF. If you are interested in the idea of retirement as a positive social good, attend this workshop.

Women and Leadership

This will be a panel discussion led by Secretary-Treasurer Jane Broedel and Director of MBA Myra Warren. The panel will give a brief overview of issues women face in becoming leaders in the NALC and how to overcome the unique challenges women face in reaching and excelling in union leadership roles. Questions from attendees will be welcomed.

Route Adjustments

The focus of this workshop will be traditional route inspections as well as discussion on the potential for a joint route adjustment process in the future. Director of City Delivery Brian Renfroe and his staff will train delegates on how to identify and address violations of Chapter 2 of Handbook M-39 before, during and after the week of inspection, including the use of Carrier Optimal Routing (COR).

Safety and Health—We All Must Get Involved

This session will be conducted by Director of Safety and Health Manny Peralta, along

with NALC National Safety Task Force members Pat Carroll, Mike Gorham, Richard Thurman and Corey Walton. The class will focus on park point safety, vehicle fires, and exposure to heat and extreme cold. This workshop emphasizes our need to get everyone involved in working toward improving safety in our workplace.

CAU Briefing and Q-and-A

Vice President Lew Drass and others will report on national-level settlements and arbitration awards since the last convention, along with pending cases at the National Interpretive Step. There will also be updates on the latest publications, including the 2014 *JCAM*. A book containing information related to this will be provided in your convention bags. Please be sure to bring the CAU Book to this class. A question-and-answer period will follow, giving the delegates the opportunity to seek clarification on issues and to provide comment and feedback to the CAU. **This class repeats on Thursday.**

AFTERNOON

Common Sense Economics

Common Sense Economics is a training program that has been developed by the AFL-CIO. The workshop will provide NALC members with training tools that can help them explain to other people how specific public policies are causing the economy to be worse for working people. The workshop will also provide NALC members with the ability to go back to their branches and communities to mobilize others to take action on these issues. A key concept to this course is communicating to people that the economy does not just "happen;" it is the result of public policy that we can change through action.

Hard Travelin' with Woody

To help the NALC celebrate its 125th anniversary, singer Randy Noojin will perform his one-man show "Hard Travelin' with Woody" as part of a week-long series of convention events to honor the NALC's extraordinary history. Hop a box car through the Dustbowl with Woody Guthrie and commune with the spirit, stories and songs of America's iconic folksinger, saint of the working man and poet of the people in this critically acclaimed multimedia one-man play with Woody's music and artworks.

Shop Steward Training School

Wednesday's class will include how to prepare and present a case at Formal Step A as well as make the appeal to Step B. As

these topics are covered, the theft case will move through the Formal Step A and Step B meetings and ultimately be appealed by the NBA to arbitration.

Letter Carrier Food Drive

Celebrating 22 years of our Letter Carrier Food Drive, we are "building on a billion" pounds of total food collected. But beyond any of the numbers we tally, letter carriers focus most on what more they can do. Feeding America representative Nell Alexander will help in our discussions: How do I get a sponsor for bags in my branch? How do we get promotional billboards? What's the best way to use social media to build awareness and momentum? We'll cover all areas of the food drive, best practices, new strategies in drawing in sponsors and partnerships, and organizing postcards and bags for distribution. This workshop will provide you new tools to grow your branch collections and help with ways to rally your members, partners and neighbors into action in support of the largest one-day food drive in the country.

Communicating Our Message

This workshop will focus on how to get our message out by dealing effectively with the news media, so we can inform the public and their representatives about the real situation of the Postal Service and the best policies moving forward. Nothing is more important to our future than getting the facts out and dispelling the myths. NALC Director of Communications and Media Relations Philip Dine will cover various aspects of communications, including influencing news coverage by speaking to reporters as well as making our own voices heard through letters to the editor/commentary pieces or being on radio/television discussion shows. The class will deal with broad media strategy and practical details of talking to a reporter.

THURSDAY MORNING

New Fiduciary Officer Training: What You Need to Know About Finance, Membership and Record-Keeping

This workshop is intended for new branch officers who have fiduciary and record-keeping responsibilities—presidents, secretary-treasurers and trustees. Attendees will be introduced to Department of Labor requirements, including bonding, member rights and fiduciary officers' responsibilities under the Labor Management and Reporting Disclosure Act of 1959. Also discussed will be tax

issues, including setting up payroll, record-keeping do's and don'ts, and the various membership rosters. NALC staff from the Information Center and Membership and Finance Departments will assist Secretary-Treasurer Jane Broendel in covering these important topics.

Filling Full-Time Regular Opportunities—M-01834

Director of City Delivery Brian Renfroe and his staff will thoroughly explain the process for filling full-time regular opportunities pursuant to the Memorandum of Understanding Re: *Full-time Regular Opportunities – City Letter Carrier Craft* (M-01834). Much of the focus of this workshop will be on city carrier assistant conversions to full-time career status and what delegates can do at the local level to ensure vacancies and opportunities are filled in accordance with M-01834. **This class repeats on Friday.**

Suicide Prevention

This class will be conducted by Director of Safety and Health Manny Peralta, along with Robert McCullough, director/national consultant for Magellan Health Services. This workshop will focus on the role of co-workers in suicide prevention.

How To Influence Congress: An Insiders Panel

NALC Director of Legislative and Political Affairs Kori Blalock Keller will moderate a panel discussion with political, legislative and messaging experts from both sides of the aisle on how to engage Congress, what messages resonate, and how to deal with fundamental differences in political ideology in building and maintaining relationships with members of Congress. Bring your questions for the experts.

CAU Briefing and Q-and-A

Same as Wednesday morning.

AFTERNOON

NALC Activists Deliver the Message

Mobilizing the NALC membership, community allies and activists, and educating elected officials are key components of the public's perception of letter carriers and the role we serve in every community across the country. This workshop will highlight ways to develop a successful grassroots lobbying effort to persuade members of Congress and members of your community to fight for a strong USPS. Additionally, learn how you can use the resources of the NALC's department of

legislative and political affairs to help you in this cause. **Admittance is limited to the first 300. This class repeats on Friday.**

Getting In—College Planning for Letter Carriers and their Children

This class will help letter carriers and their children prepare for college. Topics covered include academic preparation, working with guidance counselors, school selection, entrance exams, the application process and essays, letters of recommendation, dates and deadlines, funding and financial planning, and finding scholarships.

Shop Steward Training School

On **Thursday**, the class will be devoted solely to the presentation of a live mock arbitration of the theft case. Students will observe the union and management advocates present opening statements to the arbitrator, direct and cross-examine witnesses and offer closing arguments as they use the evidence and arguments that were developed in the case. At the conclusion of the hearing, the arbitrator will render a decision on the case and explain how the evidence that was developed during the processing of the case and presented at the hearing affected the result.

Emerging Trends in International Postal Services

As in the past, the NALC will host representatives of a number of sister unions from other countries at the 69th Biennial Convention. This workshop, chaired by NALC Director of Research Jim Holland, will provide a panel discussion on international developments in the postal sector. The privatization of Royal Mail in Great Britain and the strategy employed by the Communication Workers Union to protect its members will be discussed. The explosion of postal banking services overseas and the debates over Saturday and door delivery in other nations will also be covered.

Three Ways to be Appealing—Appealing OWCP Denials

Same as Tuesday afternoon.

FRIDAY MORNING

NALC Activists Deliver the Message

Same as Thursday afternoon.

Filling Full-Time Regular Opportunities—M-01834

Same as Thursday morning.

Branch Secretary-Treasurer Training: Do's and Don'ts

Administrative duties of branch secretary-treasurers will be covered. Examples of how to apply IRS and Department of Labor rules and regulations to branch officers' salaries, lost time and expense reimbursements will be given and discussed. In addition, information and discussion will be included on membership-related issues, including the reciprocal agreement and Form 1188. NALC Director of Finance Debra Price and NALC Director of Membership Joseph Barbour will join NALC Secretary-Treasurer Jane Broendel in presenting this workshop.

Processing Grievances—Start to Finish

Same as Monday morning.

Branch and State Retirement Directors

The *Constitution for the Government of State Associations* provides specific duties for state directors of retirees. Many branch bylaws also provide for branch directors of retirees. Their duties vary, including legislation and organization, as well as providing direct assistance to retirees and survivors. This workshop is intended for current state and branch directors of retirees, and will include open discussion of common issues, best practices and plans for moving forward.

The Strike at 40

Delegates interested in learning about the Great Postal Strike of 1970 are invited to view the video NALC produced in 2010 to celebrate the 40th anniversary of the strike. The 30-minute video features interviews with the participants, including the late Vincent R. Sombrotto and the members and leaders of New York Branch 36, and network news coverage of the strike while it was happening. The video's producer, Ann Sutherland of Sutherland Media Productions, will lead a discussion and answer questions after the viewing.