

WINNEBAGO LAND UNISERV

POLICY HANDBOOK

05/10/2000

05/15/2006 Revised

04/21/2008 Revised

05/19/2008 Revised

06/01/2009 Revised

05/16/2011 Revised

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DEFINITIONS

- BGTA -** “Business ground transportation allowance” plan (see the professional staff collective bargaining agreement for a description).
- Employee -** Includes part-time, interns, and temporary employees as well as the regular professional and associate staff employees of the UniServ.
- Staff Person -** An employee covered by the Professional or Associate Staff collective bargaining agreement, a temporary employee, or an intern.
- Major projects -** Briefs, arbitration preparation, newsletters, training/workshop materials, and other jobs requiring large amounts of associate staff production time.
- LTS -** WEAC Leave Tracking System.
- UEP -** “United Education Profession” (the greater educational community, including the NEA, WEAC, the UniSerts and the locals).
- WU, UniServ, Unit -** Winnebagoland UniServ.

These policies and procedures apply to all staff unless specifically stated differently in writing in the policy or procedure. (4/21/08)

1 **BUILDING AND EQUIPMENT**

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3 **A. SMOKING**

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5 The Winnebagoland UniServ building shall be smoke free.
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8 **B. ALCOHOLIC BEVERAGES**

- 9
10 1. There shall be no alcohol consumption during office hours (defined as 8:00 a.m.
11 to 5:00 p.m.).
12
13 2. Alcoholic beverages consumed outside of the UniServ office will not be paid for
14 by Winnebagoland dues money.
15

16 **(Reaffirmed by WU Council 5/19/2008)**
17

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19 **C. OFFICE EQUIPMENT**

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21 When possible, bids should be taken on new office equipment (i.e., printers,
22 calculators, computers, etc.).
23

24 Employees wishing to purchase new or replacement equipment will fill out the **Net**
25 **Requisition Form** (see Appendix J) and secure prior approval from the WU
26 Executive Committee before purchasing the equipment.
27

28 WU will pay the usual and customary costs for any equipment, any upgrades or
29 more expensive equipment that an employee wants can be purchased by the
30 employee, however, the equipment will remain the property of WU.
31

32 WU has the right to direct what form of equipment employees will use (i.e. Treo vs.
33 cell phone). (4/21/08)
34

35 Computers and other office technology that are being replaced will be handed over
36 to WEAC IT staff for refurbishment. After refurbishment they will be returned to
37 UniServ where staff will look to utilize them for training or other purposes. Should
38 they then prove too limited for office use, they will be offered to members for
39 purchase at a suitable price. (11/15/2010)
40

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42 **D. OFFICE USE**

43
44 The Winnebagoland UniServ Office shall be used by the UniServ Units, its locals
45 and Committees of the Unit for UEP business. This may include:
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- 47 1. Priority for the use of the office belongs to the Winnebagoland UniServ Council
48 and Local Associations.

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2. All meetings to be held in the WinnebagoLand office building must be requested in advance of the scheduled meeting date. All meetings held in the building will be calendarized on a building usage calendar. Priority building usage will be based on a first-come-first-served basis providing that the meetings were properly calendarized.
3. WU will keep the refrigerator stocked with beverages.
4. Food and drink may be brought in for meetings, but no alcohol may be brought in or consumed by non WU groups. The group using the room will be responsible for cleaning up after its meeting so that the condition of the room when leaving matches the condition when the group arrived.
5. When leaving the group using the building shall secure all doors and windows; arm the security system; and turn off all lights.
6. Groups wishing to use the building shall complete an **Office Use Request Form** which will specify the date and time that the building will be needed. (See Appendix A)
7. Groups wishing to use the building shall designate who will supervise the use of the building. The supervisor must be present at all times the building is being used.
8. Groups approved to use the building shall sign an **Office Use Agreement Form** (See Appendix B.) They shall also submit with the Agreement a deposit which will be returned provided the group complies with the terms of the Building Use Agreement. The amount of deposit will be established by the WinnebagoLand UniServ Council.
9. WinnebagoLand UniServ may establish fees for use of the building to cover heating, air conditioning, lighting, etc. costs.
10. Groups using the office shall have access to the meeting room and the restrooms. They shall not have access to the refrigerator contents, work room, library and staff offices.
11. WinnebagoLand UniServ shall have the right to revoke the Building Use Agreement if the Agreement has been breached.

E. EQUIPMENT USE

1. The cost of photocopies shall be five cents (\$.05) per black/white copy and ten cents (\$.10) for color copies for Local Associations and other organizations associated with WEAC and ten cents (\$.10) per copy for personal use. Copies will be run by Associate Staff. Council or UniServ business is exempt from the above policy.

- 98 2. The staff may make long distance personal phone calls subject to review and
99 reimbursement.
100
101 3. The Winnebagoland UniServ office phone and phone numbers shall not be
102 identified or used as a Local Association office phone or phone number.
103
104

105 **F. STAFF SERVICES**

- 106
107 1. Rates for any secretarial services requested by a Local shall be billed to each
108 Local at an hourly rate set by the Council each fiscal year. If such service requires
109 overtime work, the Local will be billed the overtime rate (time and one-half).
110 2. Requests by Local leaders and/or individual members not communicated through
111 the Professional staff shall be routed through the appropriate Professional staff
112 person.
113
114 3. Requests shall be made in writing on the **Project Request Form**. (See
115 Appendix C)
116
117

118 **G. RECORDS**

- 119
120 1. Local Record Storage
121 a. Winnebagoland UniServ Locals may store Association records in the
122 basement of the Winnebagoland UniServ building. Arrangements (date
123 and time) to move records into the Winnebagoland UniServ office for
124 storage must be made with the office Associate Staff at least one (1) week
125 prior to the move. The records will be moved by the Local's member(s).
126 b. Storage requirements are:
127 i. Locals will purge records of duplicates and/or obsolete items.
128 ii. Orderly arrangement of records for future use.
129 c. All records must be contained in clearly labeled, metal file cabinets
130 provided by the local. A key must remain onsite if the file is lockable.
131 d. New records may be added per above.
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134 **H. ACCESS CARDS**

- 135
136 1. Access cards shall be issued to the following persons:
137 a. Staff
138 b. Winnebagoland President and Vice President
139
140 2. If a meeting is scheduled at a time when no authorized person is available or
141 someone needed to access the building, the person in charge of the meeting
142 shall be issued a building access card by associate staff. The person in charge
143 of the meeting shall be solely responsible for building security and for returning
144 the issued access card.
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3. Associate staff shall maintain the list of persons authorized to possess an access card on a continuous basis or temporary basis and shall provide the list to the Executive Committee and Building Committee upon request.
 4. In order to be issued an access card, a person will have to receive instructions on building security.
 5. The supervisor of groups using the building pursuant to Winnebagoland UniServ Policies shall be provided with an access card pursuant to this policy.
 6. The security code will be changed as needed. If an access card is lost or when an employee/leader/officer resigns, retires or is no longer employed by Winnebagoland UniServ the access card will be invalidated (deleted from the security system).

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I. CREDIT CARDS

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1. Cards shall be issued to the following persons:
 - a. Professional Staff
 - b. WEAC Board Reps and Alternates
 - c. Council Officers and Associate Staff
 2. The use of the Master Card credit card or any Association issued credit card will be logged on the appropriate WEAC approved form. These should include sufficient information to comply with the terms of the Collective Bargaining Agreement and applicable policy. Any such credit card receipts shall be turned into the Winnebagoland UniServ Office within two weeks of date charges made.
 3. Association credit cards shall **not** be used for any personal expenses. In case of accidental or unavoidable use, reimbursement is to be made immediately, but in no case more than thirty (30) days following occurrence.
 - a. For purposes of interpretation, staff may use Association credit cards while attending UniServ authorized training or training sessions as a participant (trainee).
 - b. Use of Winnebagoland UniServ credit cards while attending training or training sessions as a trainer/facilitator outside the UniServ Unit is **not authorized** and all expenses incurred shall be considered as personal unless authorized by the Council.

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INCLEMENT WEATHER

The WU office can be closed or have a delayed opening in one of two ways:

1. If the President makes the decision.
2. If the Fond du Lac School District closes or delays, and the WU staff member determines it is unduly hazardous to attempt to commute to work. No employee should take an unreasonable risk attempting to commute to work.

Occasionally, inclement weather conditions are localized and, simply by waiting, employees may be able to safely arrive at work later in the day. Under these circumstances, employees should call or email the President. It will be the President's decision to approve a modification of regular work hours.

The following payroll guidelines have been established for Associate staff when the office opening is delayed or closed due to inclement weather conditions:

1. Should the office be closed due to inclement weather, regular hourly employees not otherwise on scheduled leave, will be paid for the time of the closure.
2. Employees reporting to work on days when the office is closed due to inclement weather will receive no additional pay.
3. Use of vacation time is authorized for time not covered by the closure.
4. Overtime pay will apply to only those employees who have worked over 40 hours that week.

The following payroll guidelines have been established for Professional staff when the office opening is delayed or closed due to inclement weather conditions:

1. Professional employees should make every effort to complete all professional duties regardless of whether the office is open.
2. Should the office close during the day, after employees have arrived, permitting employees to leave early, employees will be paid for the full day.
3. Employees previously scheduled and approved to be out of the office the day of closing or early dismissal shall be required to report the absence as originally requested.

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RECOGNITION AND MEMORIALS

A. RECOGNITION

- 1. From time to time the Council may elect to recognize significant service to the Unit by any member, past or present. This will be done through the inclusion of a photo (8" x 10") and a placard noting service. These photos will be included in a gallery maintained in the Council meeting room.
- 2. The honoree may submit a photo to be used or copies at Winnebagoland UniServ expense or Winnebagoland will arrange to have one taken at Winnebagoland's expense.

B. MEMORIALS

- 1. Memorials dealing with local situations shall be dealt with by Local Associations.
- 2. Memorials dealing with the whole Winnebagoland UniServ should be decided by the Council. Each situation should be handled individually.
- 3. Upon notification to the WU office of the death of an active WU member the WU Associate Staff shall send a card to the family.
- 4. In the event of the death of an active WU Staff person WU shall make an appropriate contribution.
- 5. Depending on the circumstances the contribution can be given to the family, a memorial fund, a college fund for the child(ren) of the deceased, etc.

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FAIR SHARE PROCEDURE

As an affiliate of the WEAC, WU has agreed to abide by any fair share rebate procedure adopted by WEAC. Therefore WU is committed to providing all fair share fee payers a practical and constitutionally adequate procedure to obtain a full rebate of any fair share assessment which may not be authorized by state or federal law.

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MEMBER VS. MEMBER CONFLICTS

There shall be attempts to mediate any member vs. member conflicts. If mediation is not successful, the UniServ Director assigned to the local will represent one of the members and appropriate representation of other members will be provided by WEAC legal, another UniServ Director or other qualified professional staff members. The WU President and the Local President shall be promptly notified of each such occurrence.

271 **SEXUAL HARASSMENT POLICY**

272 Including procedures for making, investigating, and resolving sexual harassment and
273 retaliation complaints.

274
275 **A. POLICY TEXT**

276
277 Sexual harassment is a form of sex discrimination that violates state and federal law.
278 WU is committed to providing a work environment free of all forms of sexual
279 harassment or intimidation, and recognizes its responsibility to correct any
280 harassment problems of which it knew or should have known. In addition, WU will
281 not tolerate any retaliation against any employee who makes a good-faith complaint
282 of sexual harassment or assists in the processing or investigating of a harassment
283 complaint. WU seeks to eliminate sexual harassment by encouraging all employees
284 and members to promptly report concerns or complaints about sexual harassment.
285 Sexual harassment at WU by any person under WU's control may result in
286 disciplinary action up to and including termination. In addition, sexual harassment
287 may also lead to personal legal and financial liability. WU also believes that its
288 members should be able to participate in Governance or other union activities free of
289 sexual harassment, and has adopted procedures to help ensure this goal.

290
291 This policy applies to all WU employees, applicants for employment, and
292 employees-in-training, certain Governance officials, members and other third parties
293 under WU's control.

294
295 **B. DEFINITION**

296
297 Sexual harassment includes any repeated or unwanted verbal or sexual advances,
298 sexually explicit derogatory remarks, or statements made in the workplace or work
299 environment that are offensive or objectionable when:

- 300
- 301 • Submission to the conduct is either an explicit or implicit term or condition
302 of employment; or
 - 303 • Submission to or rejection of the conduct is used as a basis for
304 employment decisions affecting an individual; or
 - 305 • The conduct has the purpose or effect of substantially interfering with work
306 performance or of creating an intimidating, hostile, or offensive work
307 environment.
 - 308 • The conduct has the purpose or effect of substantially interfering with a
309 member's ability to participate in the governance of WU or engage in
310 union activities.

311
312 Retaliation includes any adverse action taken against an individual covered by this
313 policy because that person made a good-faith complaint about sexual harassment or
314 assisted with a complaint. Retaliation is a serious offense which can also lead to
315 disciplinary action and is prohibited by the WU policy and state and federal law.

316 **C. PROCEDURES FOR MAKING, INVESTIGATING, AND RESOLVING SEXUAL**
317 **HARASSMENT AND RETALIATION COMPLAINTS**
318

319 The WU will provide a confidential and reliable procedure for reporting incidents of
320 sexual harassment and retaliation. The procedures employed to report and
321 investigate sexual harassment complaints shall be determined, in part, by the
322 position of the person accused of harassment, in order to prevent a situation in
323 which a subordinate investigates a superior.
324

325 **1) The Complaint process:**
326

327 The WU will designate a person in a supervisory or managerial position at WU
328 and an outside person (the WEAC Human Resources Director) to serve as an
329 investigative officer for sexual harassment issues. The names, responsibilities,
330 addresses, and phone numbers of said officers will be posted so that an
331 employee seeking such information can do so readily and anonymously. The
332 purpose of having two persons as investigative officers is to avoid a situation
333 where an employee is faced with complaining to the person, or a close associate
334 of the person, who would be the subject of the complaint.
335

336 Complaints of acts of sexual harassment or retaliation that are in violation of the
337 sexual harassment policy will be accepted in writing or orally. Anyone who has
338 observed sexual harassment or retaliation may report it to a designated
339 investigative officer. A complainant need not be limited to someone who was the
340 target of harassment or retaliation.
341

342 The investigative officer shall provide the complainant with information outlining
343 the complainant's rights and options under state and federal anti-discrimination
344 laws, and the names, addresses, and telephone numbers of state and federal
345 administrative agencies. The information is designed to assist the complainant,
346 and is not meant to be all inclusive.
347

348 The investigative officer shall establish a complaint file. The file shall contain all
349 documents pertinent to the complaint. The file should include, but is not limited
350 to: (1) the complaint; (2) documents compiled as part of the investigation; and (3)
351 a statement of the investigator's conclusions.
352

353 **2) Confidentiality:**
354

355 Investigations will be kept confidential to the extent possible. The identity of the
356 complainant will be disclosed only to those individuals who have an immediate
357 need to know, including the investigative officers, the alleged target of
358 harassment or retaliation, the alleged harassers or retaliators, and any
359 witnesses. All parties contacted in the course of an investigation will be advised
360 that all parties involved in a charge are entitled to respect, and that any retaliation
361 or reprisal against an individual who is an alleged target of harassment or
362 retaliation, who has made a complaint or who has provided evidence in
363 connection with a complaint is a separate actionable offense. This complaint
364 process will be administered consistent with applicable labor law and the
365 collective bargaining agreement, where applicable.

No WU employee shall attempt to restrain, interfere with, coerce, discriminate, or take reprisal action against the complainant(s) and their witnesses during or after the presentation, processing, and resolution of a complaint.

3) Informal Complaint Resolution:

In most instances, WU shall provide an opportunity for a resolution of the complaint on an informal basis after the complaint has been filed; however, WU may proceed directly to a determination if it concludes that informal resolution would not adequately protect employees from continuing harassment.

For the informal resolution of a complaint, the investigative officer (or a mutually agreeable designee) shall act as a facilitator if the complainant wishes to resolve the matter short of a full investigation. WU shall request the person who is alleged to be discriminating to seek a resolution of the matter on an informal basis, and to respond to the complainant within twenty (20) working days.

If the alleged discriminating person chooses not to respond to the request for an informal complaint resolution, a formal investigation will be conducted, unless otherwise agreed to by the complainant and the investigative officer.

If the complainant is satisfied with the response pursuant to an informal complaint resolution and an informal resolution of the complaint is achieved, the terms of such resolution shall be reduced to writing and made a part of the complaint file. If the complainant is not satisfied with the response, the investigative officer shall proceed with the investigation.

4) Determination and Appeal:

After the investigation has been completed, the investigator shall inform the WU Policies/Procedures/Personnel Committee of his/her determination of the complaint. The Policies/Procedures/Personnel Committee shall communicate in writing such determination to the complainant within sixty (60) days from the time the complaint is filed, unless an extension is agreed to by both parties.

If a finding is made that sexual harassment has occurred, the Policies/Procedures/Personnel Committee shall order appropriate remedial action, including counseling and/or discipline, for the accused. If the charges are unsubstantiated, however, no references shall be made in the personnel file of the accused.

After the complainant receives the Policies/Procedures/Personnel Committee written determination of WU's position, the complainant may request a reconsideration of WU's position. The reconsideration request must be filed within twenty (20) working days after receipt of the determination. The written request for reconsideration must contain a statement as to why the complainant is not satisfied with the decision. The Policies/Procedures/Personnel Committee will send the complainant a written decision within twenty (20) days after the Committee receives the reconsideration request.

415 The procedures outlined above have been adopted so as to allow for as uniform
416 administration of the sexual harassment policy as possible, and to provide guidance to
417 WU officers and employees. These procedures should not be interpreted to create any
418 additional legal or contractual rights of any employee or other individual other than what
419 is provided by federal or state law or by virtue of a collective bargaining agreement
420 governing WU and its employees. Similarly, these procedures are not intended to limit
421 any right contained in the collective bargaining agreement between the UEA and the
422 United Staff Union. WU reserves the right to immediately modify or alter these
423 procedures if utilization of the procedures would frustrate the goals of the sexual
424 harassment policy. An individual's use of or failure to use this internal procedure does
425 not preclude the individual from pursuing any rights he or she may have under state or
426 federal law.

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(This policy covers both WU officers and WU staff)

DOCUMENT RETENTION POLICY

A. INTRODUCTION

This Document Retention Policy sets forth the rules that are to be followed by the officers, employees and other representatives of Winnebagoland UniServ Council (WU Council) with regard to the retention and disposal of documents that are produced or received by WU Council in the course of its operations. The existence of a Document Retention Policy serves several important purposes. The premature or random destruction of certain documents may result in the loss of information that is necessary for the effective maintenance and operation WU Council, or may run afoul of legal requirements. At the same time, the retention of documents that no longer serve an operational or legal purpose can cause logistical and other problems. This policy has been adopted in order to deal with these and related concerns.

B. DEFINITIONS

As used in this policy, the following terms have the meanings indicated:

1. The term “documents” means materials kept in any medium by which information can be recorded or presented;
2. The term “hard-copy documents” means paper or other hard-copy documents such as film;
3. The term “electronic documents” means documents other than hard-copy documents, including computer files of any kind, such as email, websites, and instant messaging (IM).
4. The term “non-essential documents” means documents that are not required on a continuing basis to the maintenance or operations of WU Council, do not have historical value for WU Council, and are not subject to legal retention requirements;
5. The term “institutional documents” means documents that are necessary on a continuing basis for the maintenance or operation of WU Council, and documents that have historical value for the UniServ;
6. The term “legal documents” means contracts, leases, and other documents that create legal rights and obligations, documents that at a particular point in time are subject to a legal retention requirement because they deal with an event or topic that is relevant to litigation or a government investigation, and documents that are subject to a statutory or regulatory retention requirement;
7. The term “Document Retention Officer” means the person who is responsible for the implementation of this Document Retention Policy.

476 **RETENTION PERIODS**

477

478 Unless otherwise indicated by the Document Retention Officer (see Section IV (B)
479 below), documents will be retained for the following periods.

480

481 1. Non-Essential Documents shall not be retained for more than three (3) years
482 after their production or receipt without the written approval of the Document
483 Retention Officer. This three (3) year limitation shall apply to both hard-copy non-
484 essential documents (including individual “chronological files”) and electronic
485 non-essential files.

486

487 2. Institutional Documents, both hard-copy and electronic, shall be retained
488 permanently.

489

490 3. Legal Documents:

491

492 a. The following retention periods shall apply to the documents indicated:

493 i. Leases, contracts, retainer agreements, and other documents that
494 create legal rights and obligations: Six (6) years after termination of
495 the transaction in question.

496 ii. Documents relating to the election of WU Council officers: One (1)
497 year.

498 iii. Financial documents:

499 1. LM-2 reports and supporting records: Seven (7) years.

500 2. Lobbying Disclosure Act Reports and supporting records: Six
501 (6) years.

502 3. Tax filings and returns: Permanently.

503 4. Records supporting general tax filings and returns: Seven (7)
504 years.

505 5. Employment tax filings: Four (4) years after tax due date.

506 6. Property records: Ten (10) years after the property is sold.

507

508 4. Job Recruitment and Hiring Documents:

509

510 a. Job announcements and internal job postings: Three (3) years.

511 b. Hiring criteria used to select among candidates: Three (3) year for
512 unsuccessful candidates; three (3) years after termination for successful
513 applicants.

514 c. Tests and similar selection criteria: Three (3) years (longer if adverse
515 impact identified).

516 d. Employment applications, resumes, reference letters, and other
517 documents received from job applicants: Three (3) years for unsuccessful
518 candidates; three (3) years after termination for successful applicants.

519 e. Background investigation reports: Three (3) years after applicant /
520 employee is given notice of the report.

521 f. Pre-hire medical examinations: Three (3) years.

522 g. Offer and hiring records, employment contracts: Six (6) years after
523 termination.

- 524 h. Immigration and tax forms upon hiring: Three (3) years.
525 **5. Employment Documents**
526 i. Affirmative action plans: Two (2) years; longer if adverse impact identified.
527 j. Wage and hour records: Three (3) years.
528 k. Family and Medical Leave Act records: Three (3) years.
529 l. Individual employment records: Three (3) years after termination.
530 m. General employment records: Three (3) years.
531 n. General employee benefit plans: Six (6) years after filing.
532 o. Retirement plans: permanently.
533 p. Group health plans: Two (2) years under HIPPA after loss of coverage; six
534 (6) years under COBRA after loss of coverage.
535 q. OSHA records: Five (5) years.
536

537 The Document Retention Officers will notify officers, employees and other
538 representatives of WU Council in writing of any special document retention
539 requirements that may apply to particular documents at any point in time because of
540 litigation and / or government investigations. These requirements shall take precedence
541 over any other document retention periods set forth in this policy.
542

543 **C. DOCUMENT RETENTION OFFICERS**

- 544
- 545 **1.** There shall be two (2) Document Retention Officers each having distinct and
546 exclusive responsibilities.
 - 547 **b.** The WU Council shall appoint a member of the Council to serve as a
548 Document Retention Officer who shall be responsible for assuring that this
549 Document Retention Policy is effectively implemented as it relates to
550 documents kept in the following categories: Conferences, Insurance,
551 Membership, Newsletters and UniServ Management.
 - 552 **c.** The employees of the WU Council shall appoint a staff member to serve as a
553 Document Retention Officer who shall be responsible for assuring that this
554 Document Retention Policy is effectively implemented as it relates to
555 documents kept in the following categories: Locals, NEA-Sourced & Related,
556 PAC, Studies, Reference Materials, Training, WEAC-Sources & Related,
557 UniServ-Sourced & Related and Wisconsin Dept. of Public Instruction.
558
 - 559 **2.** Any officer, employee, or other representative of The WU Council who has a
560 question about the implementation of this policy (including whether a particular
561 document should be classified as Non-Essential, Institutional, or Legal), or is
562 seeking an exception to an established document retention period, shall consult
563 with both Document Retention Officers.
564
 - 565 **3.** The Document Retention Officers shall have the authority to modify or suspend
566 any established document retention period for legal reasons or for other sufficient
567 cause.
568
 - 569 **4.** The determination of the Document Retention Officers with regard to any matter
570 involving implementation of this policy shall be final, unless overturned by a
571 majority vote of the WU Council.

File Categories for Winnebagoland UniServ Created and Received Documents

Document Retention Officers

DRO	Major Classification	Minor Classification	General Retention Guidelines
1	Conferences	By type	Three (3) years maximum; no minimum
2	Insurance	By type	Permanent or until no longer needed
3	Locals*	Bargaining Units*	Permanent or until no longer needed
4	Membership	By fiscal year	Permanent or file; current, not historical
5	NEA-Sourced & Related	By topic	Three (3) years maximum; no minimum
6	Newsletters - UniServ & WEAC	By publication date	Permanent for WU Council; else three (3) years
7	PAC	By topic; fiscal year	Five (5) years
8	Reference Material	By holder to suit	Permanent or until no longer needed
9	Studies	By topic	Three (3) years maximum; no minimum
10	Training (e.g. ESEA, organizing)	By type then date	Permanent or until no longer needed
11	WEAC-Sourced & Related	By topic	Three (3) years maximum; no minimum
12	WU Council-Sourced & Related	By topic	Three (3) years maximum; no minimum
13	WU Management		
	<i>Organized by topic</i>	Administrative	Three (3) years maximum, no minimum
		Budgets	Permanent file; current, not historical
		Commercial	(Not subject to any legal retention requirement so 6 years)
		Facilities	Permanent
		Financial Statements	Seven (7) years
		Governance	Permanent; elections for one year only
		History	Permanent
		Investments	Three (3) years maximum; no minimum
		Limited Legal	Subject to statutory or regulatory requirements, see DR Policy
			As a labor union (five years)
			As a politically active organization (six years if applicable)
			As an employer (one year for rejected applicants)
			As a taxpayer (seven years)
		Policies & Procedures	Permanent file; current, not historical
		Staff	"As an employer" per Document Retention Policy

*Subcategories of files under Locals/Bargaining Units

Bargaining: (1) Past; (2) Present; (3) Future

Financials

General Correspondence

Governance

Grievances & Arbitrations

Members & Issues (cross-referenced)

Newsletters

Organizing

PAC

Ratified Contracts & Memos of Understanding

572 **GRIEVANCE/ARBITRATION ASSISTANCE FUND**

573
574 **A. PURPOSE**

575
576 The Winnebagoland UniServ shall establish and maintain a fund for the purpose of
577 assisting Locals in paying the costs of grievance arbitrations so that every Local,
578 regardless of size, can process meritorious grievances to arbitration.
579

580 **B. LOCAL'S SHARE**

581
582 In order to be eligible for UniServ funding, a Local must have expended an amount
583 which is \$500 + \$5 per dues paying member, the threshold not to exceed \$1,000.
584 For purposes of this article each request from any Local will be treated as a new
585 request for funding.
586

587 **C. UNISERV'S SHARE**

588
589 The fund shall be established through the budget process by per member
590 assessment and use of carryover until a minimum base of \$5,000 is achieved.
591 Thereafter, the budget will reflect needs to replenish the base amount.
592

593 **D. UNISERV DEFENSE FUND COMMITTEE**

594
595 A Committee of five (5) persons comprised of: two (2) council members, three (3)
596 members-at-large and two (2) alternates shall be appointed annually by the UniServ
597 President with approval by the UniServ Council. Each committee member shall be
598 an active member of his/her affiliate Local and no Local shall have more than one (1)
599 person on the committee. In the event a member represents the affected Local, is
600 absent or excuses him/herself from any meeting or portion thereof, an alternate shall
601 be granted full rights of participation.
602

603 **E. PROCESS**

604
605 **1. Application**

- 606 **a.** A request for funding from a Local shall come in the form of a written
607 application which shall contain the following:
608 **i.** Issue(s) being arbitrated
609 **ii.** Remedy(ies) being sought
610 **iii.** Brief summary of results at each step
611 **iv.** Costs
612 **1.** Amount billed date
613 **2.** Amount requested from Winnebagoland UniServ
614 **3.** Validation of Local's share
615 **v.** Contract language in dispute
616 **vi.** Interpretation of issues
617 **1.** Local
618 **2.** District
619 **vii.** Special circumstances
620 **b.** The UniServ Director involved shall submit a brief evaluation of the grievance.

621 **2. Grant**
622 The Committee shall review each Local funding application and make written
623 recommendations to the Winnebagoland UniServ Council. Approval may be
624 denied because of any of the following:
625 a. Lack of UniServ funds
626 b. Noncompliance with the process
627 c. Lack of information
628 d. Written recommendation from a UniServ Director or WEAC Legal
629 Division

630
631 **3. Appeal**
632 In the event an affiliated Local Association does not agree with the decision of
633 the Council, the Local may request that the subject be placed on the agenda
634 for the next Council meeting for appeal. Further appeal shall be placed on the
635 agenda of the next Representative Assembly.
636

637 **F. FUNDING**

638
639 The amount of the grant shall be the eligible costs of arbitration minus WEAC's
640 share (50% of the eligible costs of the arbitration exceeding \$10 per member of the
641 local) and minus the Local's share described in Paragraph B.

642
643 Eligible costs include arbitrator's fees and expenses (included in arbitrator's bill to
644 union and employer) and the cost of a transcript, but exclude witness fees, legal
645 fees, outside attorneys and all other costs.

**REQUESTS BY STUDENT WEA CHAPTERS
FOR NON-BUDGETED FUNDING**

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662

- A.** Funding requests by WEA Chapters for non-budgeted items shall be considered by the Council on a case by case basis.
- B.** In order for a funding request to be considered at a Council meeting, an application must be submitted so Council representatives have a copy at the start of the meeting. (See Appendix D for a copy of the **Application by Student WEA Chapter for Non-Budgetary Funding.**)
- C.** A chapter representative may make a presentation to the council on behalf of the funding request during the report section of that meeting. All funding request decisions will be made by the Council.
- D.** The Chapter representative shall provide a report and a copy of expenditures to the Council.

663 **APPOINTEES TO STATE AND UNISERV COMMITTEES**

664
665 **A. WEAC COMMITTEES**

666
667 Members wishing to be appointed to WEAC Committees shall notify the WU
668 President or other appropriate person and comply with the WEAC procedure.
669 (See Appendix E for the **WEAC Committee Appointment Form**.)
670

671 **B. WU COMMITTEES**

- 672
673 **1.** Members wishing to be appointed to WU Committees shall notify the WU
674 President prior to September 30 of each year.
675
676 **2.** The WU Standing Committees are:
677 **a.** Executive
678 **b.** Constitution and Bylaws
679 **c.** Budget and Finance
680 **d.** Credentials and Elections
681 **e.** Legislative
682 **f.** Policies/Procedures/Personnel
683 **g.** Building Corporation
684 **h.** Strong Affiliates
685 **i.** Instructional Professional Development Committee

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STANDING COMMITTEES

A. EXECUTIVE (see Constitution and Bylaws)

B. CONSTITUTION AND BYLAWS

1. The Constitution and Bylaws Committee shall be comprised of at least three (3) Council Members. One (1) of whom shall serve as Chair person.
2. By February, the Constitution and Bylaws Committee shall review the Constitution and Bylaws and report to the Council in March.
3. Any proposed changes to the Constitution and By-Laws shall be presented to the March meeting of the WU Council.
4. The WU Council shall vote at the April meeting on recommendations to be sent to the RA for approval.
5. The Chair of the Committee shall submit a firm budget estimate to the Budget and Finance Committee by February 1 for the next year's budget.

C. BUDGET AND FINANCE

1. The Budget and Finance Committee shall consist of the Treasurer and at least three (3) Council members. The Treasurer shall be the Chairperson.
2. The Budget and Finance Committee shall meet on a monthly basis October through May.
3. All Winnebagoland UniServ Committee Chairs are to submit a firm budget estimate to the Budget and Finance Committee by February 1, for the next year's budget.
4. The proposed budget shall be presented to the March meeting of the WU Council.
5. The WU Council shall vote at the April meeting on the proposed budget to be sent to the RA for approval.

D. CREDENTIALS AND ELECTIONS

1. The Credentials and Elections Committee shall consist of at least three (3) Council members, one (1) of whom shall be the Chairperson.
2. If a member of the Credentials and Elections Committee is a candidate for the WEAC Board or if a member is not returning to the Council, the President shall appoint a member to replace that person on the Credentials & Elections Committee for that election.

- 734 3. The Credentials and Elections Committee shall:
735
736 a. Direct the Associate Staff to send out requests for nominations for the office
737 of President, WEAC Board Rep. and WEAC Board alternate.
738 b. Certify the nominations received are in good standing.
739 c. Count the ballots at the RA.
740
741 4. The Credentials and Elections Chair shall:
742
743 a. Ensure that training be provided to Local Presidents regarding election
744 procedures at the Fall Presidents meeting.
745 b. Chair the election process during the RA.
746 c. Conduct the nomination and election process for officers at the May Council
747 meeting.
748 d. Submit a firm budget estimate to the Budget and Finance Committee by
749 February 1, for the next year's budget.
750

751 E. LEGISLATIVE

- 752
753 1. The Legislative Committee shall consist of at least one (1) representative from
754 each Local. A member of the Council shall serve as the chair.
755
756 2. The Legislative Committee shall meet on a monthly basis October through May.
757
758 3. The Legislative Committee shall:
759
760 a. Keep locals informed of legislative issues.
761 b. Screen candidates for endorsement.
762 c. Work with staff on election activities.
763 d. Bring forth legislative actions and ideas for training to the Council meetings
764 (cyber lobby, writing postcards, etc.).
765
766 4. The Chair of the Committee shall submit a firm budget estimate to the Budget
767 and Finance Committee by February 1, for the next year's budget.
768

769 F. POLICIES/PROCEDURES/PERSONNEL

- 770
771 1. The Policies/Procedures/Personnel Committee shall consist of at least three (3)
772 members from the Council.
773
774 2. The Vice President of the Council shall be the Chairperson.
775
776 3. The Policies/Procedures/Personnel Committee shall meet at least monthly
777 October through May.
778
779 4. The Policies/Procedures/Personnel Committee shall review the WinnebagoLand
780 UniServ Policy Handbook annually and report any proposed changes or
781 additions to the UniServ Council.

- 782 5. The WU Council shall vote at the 2nd meeting following the 1st reading on the
783 proposed changes. I.e. proposal read at the September Council, voted on at the
784 November Council.
785
- 786 6. The Policies/Procedures/Personnel Committee shall create such policies and
787 procedures as directed by the UniServ Council. In the event that a
788 policy/procedure needs to be addressed while PPP is not meeting, the Executive
789 Committee has the authority to deal with additional policies/procedures.
790
- 791 7. The Policies/Procedures/Personnel Committee shall meet at least annually with
792 all staff.
793
- 794 8. The Policies/Procedures/Personnel Committee shall ensure that evaluation of all
795 staff is done in accordance with the appropriate Collective Bargaining
796 Agreement.
797
- 798 9. The Policies/Procedures/Personnel Committee shall investigate any issue(s)
799 that could result in disciplinary action. After investigation the Committee will
800 consider the matter and if possible resolve the matter. If disciplinary action is
801 necessary the Committee will recommend that to the Executive Committee. If
802 the matter cannot be resolved by the Committee it will be referred to the
803 Executive Committee. All actions taken by the Committee will be reported to the
804 Executive Committee.
805
- 806 10. The Policies/Procedures/Personnel Committee shall recommend to the
807 Executive Committee the hiring and termination of all staff.
808
- 809 11. The Policies/Procedures/Personnel Committee shall designate a Hiring
810 Committee.
811
- 812 12. The Policies/Procedures/Personnel Committee shall consider and attempt to
813 resolve any issues concerning member and/or local representation.
814
- 815 13. The Chair of the Committee shall submit a firm budget estimate to the Budget
816 and Finance Committee by February 1 for the next year's budget.

817
818 **G. BUILDING CORPORATION**
819

- 820 1. The Building Corporation Committee Shall consists of no more than five (5) WU
821 members. The Chairperson shall be the WU Treasurer.
822
- 823 2. The Building Corporation Committee shall meet on a monthly basis October
824 through May.
825
- 826 3. The Building Corporation Committee shall:
827
- 828 a. Deal with all building and grounds issues.
 - 829 b. Report to the Council monthly.
 - 830 c. Seek approval from the Council for all expenditures of funds.

831 4. The Chair of the Committee shall submit a firm budget estimate to the Budget
832 and Finance Committee by February 1, for the next year's budget.
833

834 **H. STRONG AFFILIATES**
835

836 1. The Strong Affiliates Committee shall consist of at least three (3) members from
837 the Council, members from locals and UniServ Director(s). A UniServ Director
838 shall serve as the coordinator.
839

840 2. The Chairperson shall be appointed by the Committee.
841

842 3. The Committee shall meet on a monthly basis October through May.
843

844 4. The Committee shall have responsibility for: Leadership Development and
845 Training; NEA initiatives; WEAC initiatives; acquainting members with the
846 organization; professional development; etc.
847

848 5. The Chair of the Committee shall submit a firm budget estimate to the Budget
849 and Finance Committee by February 1, for the next year's budget.
850

851 **I. INSTRUCTIONAL PROFESSIONAL DEVELOPMENT (IPD) COMMITTEE**
852

853 1. The Instructional Professional Development (IPD) Committee shall consist of
854 members from the board and interested local members selected by council
855 members.
856

857 2. A UniServ Director shall serve as the Liaison.
858

859 3. The Chairperson shall be selected from the committee members.
860

861 4. The committee shall have the responsibility for workshops and/or training
862 including, but not limited to:

863 a. How to develop a Quality Professional Development Plan

864 b. How to use the Quality Educator Interactive

865 c. DPI Educator Tool Kit, and other WEAC resources

866 d. PDP goal approval

867 e. PDP review team training session

868 f. Mentor training

869 g. Other professional development training including, but not limited to,
870 medical issues, violent students, technology for the 21st century.
871

872 5. Committee members are appointed for one (1) year terms. Members can serve
873 up to three (3) years. No one shall serve more than three (3) consecutive terms.
874

875 6. The Committee shall meet as needed to establish the infrastructure necessary to
876 implement the Department of Public Instruction requirements of initial educators
877 on an on-going basis.
878

879 7. The Chair of the Committee shall submit a firm budget estimate to the Budget
880 and Finance Committee by February 1, for the next year's budget.

881 WINNEBAGOLAND REPRESENTATIVE ASSEMBLY

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1. The Unit Director and associate staff person assigned as liaisons to the Budget and Finance Committee are responsible for distributing the proposed Winnebagoland UniServ budget to the Winnebagoland UniServ Representative Assembly delegates no less than ten (10) calendar days prior to the Winnebagoland UniServ Representative Assembly.
2. Unit Directors must submit their reports for the Winnebagoland UniServ Representative Assembly so that said reports are included with the budget for distribution to the Winnebagoland Representative Assembly delegates.
3. Unit Directors and associate staff are expected to attend the Winnebagoland UniServ Representative Assembly.
4. The contents of the delegate packet for the Winnebagoland UniServ Representative Assembly include the following items: the budget, Unit Director reports, and the WEAC Board report. This packet must be transmitted to the Winnebagoland UniServ Representative Assembly delegates no later than ten (10) calendar days prior to the Winnebagoland UniServ Representative Assembly.
5. The delegate roster must be provided to the President at the same time that Winnebagoland UniServ Representative Assembly materials are being transmitted to the delegates. No changes may be made to the delegate roster except as indicated in Bylaws, Article 2, Representative Assembly, Allocation and Election of Delegates, Subsection 2, Page 7.
6. The Winnebagoland UniServ Secretary along with an associate staff member will check-in delegates as they arrive for the Winnebagoland UniServ Representative Assembly. The delegate roster will be certified upon the conclusion of seating the delegates in accordance with Bylaws, Article 2, Representative Assembly, Allocation and Election of Delegates, Subsection 2, Page 7.
7. Prior to voting Delegates will check-in with the Secretary, who will mark their names off on the approved attendance roster and then give the delegates an official ballot. Upon voting, the delegates will hand their ballots to a member of the Credentials and Election committee who will be overseeing the voting process.

CONFLICT OF INTEREST (OFFICERS)

It is essential that the members of the Winnebagoland UniServ (WU) have complete confidence in the integrity of the officers of WU. In order to justify that confidence, officers shall not take any action which might result in, or create the appearance of, a conflict with the full performance of their official duties and responsibilities. The purpose of this policy is to insure a process that emphasizes openness and objectivity. Set forth below are the four Standards of Conduct that make up this policy:

A. ITEMS OF VALUE

No officer shall solicit or accept, directly or indirectly, for personal benefit, any compensation, gifts, loan, or other thing of value from any person, group, business, institution, or other organization which either has or is seeking to enter into a business relationship with WU, or has an interest which may be affected by the performance or non-performance of the officers' duties and responsibilities.

The WU President may provide for such exceptions to the above paragraph as are appropriate in view of the duties and responsibilities of particular officers or the nature of particular transactions.

For example, it may be appropriate to permit the acceptance of food, lodging, etc., in the ordinary course of a meeting or other business transaction; the acceptance of de minimus gifts such as calendars, appointment books, etc.

B. PARTICIPATION

No officer shall participate in any WU matter in which he or she has a direct or indirect private interest. For purposes of this paragraph, the term "participate" shall mean the authority, directly or indirectly, to approve, disapprove, recommend, or otherwise affect WU action; further, the interest of a spouse, minor child, or other member of the officer's immediate household shall be considered an interest of the officer.

The restraint set forth in the above paragraph shall not apply if, in the opinion of the WU President, the officer's private interest is not substantial enough to have an effect on the integrity of his or her services.

Where there is a question of conflict of interest regarding the WU President, the matter shall be brought to the immediate attention of the WU Board of Directors for determining if a conflict exists.

C. INFORMATION

Unless expressly authorized by the WU President, no officer shall, directly or indirectly, make use of or permit others to make use of any "inside" information (i.e., information obtained through the performance of the officer's duties that is not available to the general membership of the UniServ) for the purpose of furthering a private interest.

D. TRANSACTIONS

No officer shall engage in any transaction or activity which, by its very nature, is inconsistent with the officer's official duties and responsibilities or has the appearance of a conflict of interest.

EMPLOYMENT OF STAFF

A. PERMANENT STAFF

1. In the event of a staff vacancy (associate or professional), the Policies/Procedures/Personnel Committee shall recommend to the President of WU a Hiring Committee.
2. The Hiring Committee (consistent with WEAC Board Policy) shall be responsible for posting the vacancy, screening, interviewing, and making a recommendation for hiring to the Policies/Procedures/Personnel Committee. The Hiring Committee may, at its option, receive input from staff who shall not be members of the Committee.
3. The UniServ Council shall have final authority to hire.

B. TEMPORARY STAFF

The Policies/Procedures/Personnel Committee shall have authority to hire temporary staff with the final approval of the Council.

C. OUTSIDE EMPLOYMENT

The purpose of this procedure is to provide guidelines for Winnebagoland UniServ (WU) professional staff who seek to perform outside employment and to allow the UniServ to ensure that any outside employment does not interfere with the performance of the employee's regular assignments or create an actual or perceived conflict of interest.

Full time professional staff employed by WU must inform the UniServ President of any additional employment accepted if the work is scheduled to be performed on any regularly scheduled work day (not including approved vacation), regardless of the time the work is scheduled, or any work that is substantially similar to their professional duties as a UniServ Director.

The WU Executive Committee reserves the right to disapprove any additional work that directly interferes with the employee's regular duties or creates an actual or perceived conflict of interest.

Should the WU Executive Committee approve outside employment the WU office, staff and equipment shall not be used in any way to support that outside employment. **(4/21/08)**

OFFICE PROCEDURES (STAFF)

A. GENERAL

1. All major projects (briefs, arbitration preparation, newsletters, training/workshop materials, and other jobs requiring large amounts of Associate Staff production time) must meet the following timelines for submission of rough draft:

- Briefs - - one week prior to due date
- Reply Briefs - - two to three days prior to due date
- Final Offers - - one day prior to due date
- Copy work - - according to volume

Conflicts and/or emergency situations which interfere with the work schedule calendar will be resolved by the Professional Staff in consultation with one another and with the appropriate Associate Staff person(s).

2. Professional and Associate Staff shall work together on major projects to ensure that they make all time deadlines. Associate Staff will be given enough lead time to adequately prepare materials requested by the Professional Staff. Professional Staff will be given enough time to review materials prior to their distribution and/or use.
3. All periodicals, newsletters, and subscriptions purchased by Winnebagoland shall be routed to all Professional Staff and/or appropriate Associate Staff person(s), Council officers and members, etc. The receiving person(s) shall review the material and move on to the next person on the routing slip.
4. Periodicals, reports, etc. shall be filed in books and/or binders established by the professional staff.

B. OFFICE HOURS

1. School year:

8:00 a.m. – 5:00 p.m.

2. Summer:

M-Th – 7:30 a.m. – 4:30 p.m.; Fri – 7:30 a.m. – 1:30 p.m.

C. BREAKS FOR ASSOCIATE STAFF

1. Full-time staff shall receive two fifteen (15) minute breaks to be scheduled – one in the a.m. and one in the p.m.
2. Part-time staff shall receive two ten (10) minute breaks to be scheduled one in the a.m. and one in the p.m.

1069 **D. LUNCH TIME FOR ASSOCIATE STAFF**

- 1070
- 1071 1. Each Associate Staff shall have a one-half hour lunch period to be scheduled by
- 1072 Associate staff persons between 11:30 a.m. and 1:30 p.m. so that the office will
- 1073 be staffed during this period whenever possible.
- 1074
- 1075 2. Professional staff and others in the office shall make every effort to respect the
- 1076 lunch period and not ask for Associate Staff assistance while they are on their
- 1077 lunch period.
- 1078

1079 **E. SCHEDULED AND UNSCHEDULED SICK LEAVE**

- 1080
- 1081 1. When a staff person is out unexpectedly (without having the absence pre-
- 1082 approved), he/she shall call the office and the President at home to report the
- 1083 absence. Upon returning to work the staff person shall submit a request through
- 1084 the LTS.
- 1085
- 1086 2. Sick Leave requests for WU staff shall be submitted to the President for prior
- 1087 approval through the LTS. Official leave records are kept at the WEAC office in
- 1088 Madison. Leave is also tracked at the WU office as support for WEAC's records.
- 1089

1090 **F. OVERTIME FOR ASSOCIATE STAFF**

- 1091
- 1092 1. If there is an anticipated need for extra hours, a written request with rationale
- 1093 shall be submitted to the President.
- 1094
- 1095 2. When an urgent unanticipated need arises an oral request shall be made to the
- 1096 President.
- 1097
- 1098 3. Prior approval is necessary to work overtime.
- 1099

1100 **G. WEEKLY STAFF SCHEDULES**

- 1101
- 1102 1. Each staff member shall give her/his weekly work schedules to all other staff and
- 1103 the President.
- 1104
- 1105 2. Staff schedules for the following week shall be given to all other staff no later
- 1106 than the last day the office is open during the preceding week.
- 1107
- 1108 3. Each staff member shall place a copy of her/his weekly work schedule in an
- 1109 "Official Staff Work Schedule" binder to be kept at the Associate Staff's work
- 1110 station.
- 1111

1112 **H. APPROVAL OF VACATION, PERSONAL LEAVE, AND EARNED PERSONAL**

1113 **LEAVE (EPL)**

- 1114
- 1115 1. Vacation:
- 1116
- 1117 Requests for vacation shall be made within reasonable advance notice of the
- 1118 time requested off. While not required, it is suggested that vacation requests
- 1119 should be made as far in advance as possible to ensure that the UniServ office is
- 1120 appropriately staffed.

- 1121 a. Requests for vacations shall be submitted to the President using the Leave
1122 Tracking System.
1123 b. In the President's absence the request should be sent by e-mail to WEAC
1124 HR.

1125
1126 **2. Personal Leave**

- 1127
1128 a. Requests for personal leave shall be submitted to the President using the
1129 Leave Tracking System. In the President's absence the request should be
1130 sent by e-mail to WEAC HR.
1131 b. Reasonable advance notice shall be given for use of personal leave.

1132
1133 **3. Earned Personal Leave (EPL)**

1134
1135 Requests for Earned Personal Leave (EPL) must be approved in advance by the
1136 WU President. E-mail requests to the President should include pertinent
1137 information, such as nature of work, time needed, why the work cannot be
1138 performed at a time other than a Sunday or Holiday, etc.

1139
1140 **I. CALENDAR AND TIME USE REPORTS**

1141
1142 **1. Monthly Calendar**

1143
1144 A consolidated monthly calendar, including activities of all UniServ Staff should
1145 be kept in the office and available to the Personnel/Policies/Procedures
1146 Committee. The calendar should be updated frequently (as is reasonable) to
1147 allow the Committee and other leaders to locate staff when needed and to
1148 provide general insight into staff activities.

1149
1150 **2. Daily Log**

1151
1152 UniServ Professional Staff will maintain a daily log indicating duties performed.
1153 The method used should be detailed enough to produce reliable information for
1154 the purpose of determining fair share rebates.

1155
1156 **J. VOUCHERS, MILEAGE REPORT FORMS**

1157
1158 **1. Net Requisitions** should be completed using the WEAC approved software in a
1159 manner consistent with policy and the Collective Bargaining Agreement.

1160
1161 **2. Mileage reports** should be filed on the WEAC approved forms (BGTA for
1162 Professional Staff) indicating date, mileage, etc. with an indication of whether
1163 such mileage was business or personal.

1164
1165 Employees who want to use their personal vehicle for out of state travel to a
1166 training event may do so, however, the costs for the use of the vehicle will only
1167 be reimbursed equal to the amount of a 30 day advanced purchased airline ticket
1168 and the mileage for the trip will not be counted as business mileage for BGTA
1169 purposes. **(4/21/08)**

- 1170 3. Vouchers, mileage report forms, and daily time logs are to be filed within sixty
1171 (60) days of occurrence and on a monthly basis with the WEAC Accounting
1172 Office. The WEAC Accounting Office will retain all copies and will, upon request,
1173 forward copies to the Personnel Committee. When employees submit their
1174 monthly BGTA reports to WEAC they shall submit a copy of the report to the
1175 UniServ President. **(4/21/08)**
1176
- 1177 4. Monthly time logs will be filed in the WinnebagoLand UniServ office within thirty
1178 (30) days of the end of the month.
1179

1180 **K. TRAINING**

- 1181
- 1182 1. No more than one UD will attend any out of state training program. The UD who
1183 attends will share his/her materials and learnings from the training with the other
1184 UDs. Exceptions may be made with the approval of the Executive Committee.
1185

1186 UDs who are using WU funds to attend training will participate in the training.
1187 (Example: A UD will not go to training in another state and then not attend any of
1188 the training or not attend a majority of the training sessions and expect to be
1189 reimbursed for the training or travel.) **(4/21/08)**
1190

1191 **L. OVERNIGHT LODGING**

- 1192
- 1193 1. WU will not reimburse employees who stay overnight at a motel for a morning
1194 meeting if the meeting is within 50 miles of the WU office and the meeting starts
1195 after 8:45 a.m.
1196
- 1197 2. Staff attending the WEAC professional staff meetings in Madison may go down
1198 the night before if weather dictates, however, they will not be eligible for a dinner
1199 meal unless they have a business reason to be in Madison before 7 pm.
1200 **(4/21/08)**
1201

1202 **M. PERSONAL ITEMS IN THE WU OFFICE**

- 1203
- 1204 1. While employees are free to decorate their office or work area as they choose, as
1205 long as it is in keeping with a professional office, the decorations should not
1206 result in any costs to WU. Employees are not allowed to store anything on WU
1207 premises or have personal deliveries of items made to the WU office on a regular
1208 basis. **(4/21/08)**
1209

1210 **N. MEALS**

- 1211
- 1212 1. WU employees shall not purchase meals for members on a regular basis.
1213 Meetings should be scheduled at work sites or the WU office as much as
1214 possible.
1215
- 1216 2. WU will not reimburse staff for lunches when no members are involved and a
1217 meal is not necessary to conduct WU business. "Staff meetings" of the UniServ
1218 directors are not necessary meetings to justify a noon meal paid for by WU.
1219 **(4/21/08)**

1220 **O. WORKLOAD**

- 1221
- 1222 1. As much as possible work will be spread evenly amongst staff in the same job
- 1223 category. **(4/21/08)**
- 1224

1225 **P. FITNESS FOR DUTY**

- 1226
- 1227 1. It is the goal of WU to provide a safe workplace for all employees. We also want
- 1228 a workplace that is free of drug and alcohol abuse. To accomplish these goals,
- 1229 the WU has adopted the following fitness for duty policy:
- 1230
- 1231 a. All employees are to be mentally and physically fit at all times at work and
- 1232 thereby able to perform their duties as described in their job descriptions. WU
- 1233 reserves the right to screen its employees as an effective measure in
- 1234 providing a safe, healthy, and productive working environment.
- 1235
- 1236 b. Should an employee report to work unfit to perform his/her duties the WU
- 1237 President may ask the Employee to undergo a breath, blood, urine or hair test
- 1238 or to secure a statement from a medical provider that the employee is fit for
- 1239 work. **(4/21/08)**
- 1240

1241 **Q. E-MAIL POLICY**

- 1242
- 1243 1. The purpose of this Policy is to protect WU's IT system. WU's concerns in
- 1244 regard to the use of the system are as follows:
- 1245
- 1246 • Damage to our IT infrastructure and its performance arising from viruses or
 - 1247 problematic emails that consume an inordinate amount of computer hard
 - 1248 drive space.
 - 1249 • Inappropriate materials that could create a "hostile environment" or implicate
 - 1250 WU in unlawful activity. In addition, e-mails are a form of correspondence and
 - 1251 may be reviewed by unanticipated parties, potentially causing legal concerns.
 - 1252 • E-mails that cause unnecessary and undue distractions from work.
- 1253
- 1254 2. Employees should not send any electronic communication that could reasonably
- 1255 be interpreted to create a "hostile environment." If an employee has any question
- 1256 about the appropriateness of an electronic communication, the employee should
- 1257 consult with the WU Executive Committee.
- 1258
- 1259 3. WU reserves the right to take all appropriate actions to ensure that its computer
- 1260 system is not used in a manner that may create legal liability for WU or the user.
- 1261
- 1262 4. Workplace distraction is a more sensitive and complex problem. Many
- 1263 employees do not wish to receive e-mails that others want them to read. Even if
- 1264 employees do welcome e-mails, they can become unduly distracting. Basic e-
- 1265 mail etiquette can resolve many issues. This etiquette includes:
- 1266
- 1267 • Treat e-mails as correspondence. If you would not send your e-mail as a
 - 1268 signed letter, strongly consider not sending the e-mail or rewriting it.

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- Only send electronic materials to those individuals you are confident want to receive the information. E-mails to the entire “WEAC all employees” should be very carefully considered.
 - If an employee is uncertain of how to post a matter, he/she should contact the WU Executive Committee.
5. WU will not permit its IT system to be used to undermine its organizational objectives.
- Individuals may not use WU’s e-mail system to undermine WU’s mission, governance, management, or staff.
 - Individuals may not use WU’s e-mail system to endorse positions inconsistent with WU policies and/or rules; e.g., individuals may not use WU’s e-mail system to support candidates opposed by WU or vice-versa, individuals may not encourage members to attend non-public schools, etc.
 - As required by the collective bargaining agreement, e-mail may not be used to conduct union business on work time.
6. WU’s primary method of ensuring compliance with this rule will be through employee education; however, consistent with the collective bargaining agreement, WU reserves the right to discipline employees for violation of these rules. Such discipline will be consistent with the collective bargaining agreement. (4/21/08)

1293 **R. INTERNET POLICY**

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1. WU provides computers to all WU employees so that they can perform their duties. The PCs provided, whether desktop, laptop or hand-held, are WU property and have access to WU servers and the Internet, and via the Internet, are subject to attack, compromise, and destruction.
 2. The following computer uses may compromise WU’s systems or cause legal liability and are therefore prohibited:
 - a. Use of WEAC computers for Instant Messaging (IM) communications.
 - b. Transmitting copyrighted materials without permission from the copyright holder.
 - c. Knowingly uploading a virus, spyware, or other malicious computer code.
 - d. Knowingly or carelessly releasing confidential WU information, such as member Social Security numbers, to unauthorized people or destinations.
 - e. Engaging in sales or marketing activities for non-WU goods or services; e.g., no eBay or similar selling unless directed by the WU Executive Committee.
 - f. Intentionally visiting websites and viewing sexually explicit, pornographic or other inappropriate non-business related material, unless authorized by the WU Executive Committee for organizational purposes – such as defending a member.
 - g. Downloading large amounts of music and videos.

1316 3. WU Employees should have no expectation of privacy when it comes to business
1317 and personal use of WU's Internet access. WU reserves the right to disclose
1318 Internet transmitted information and images to regulators, the courts, law
1319 enforcement and other third parties without the employee's consent. Except in
1320 exigent circumstances, the employee will be notified prior to such release.
1321 **(4/21/08)**

1322
1323 **S. ALCOHOLIC BEVERAGES**

- 1324
- 1325 1. There shall be no alcohol consumption during office hours (defined as 8:00 a.m.
1326 to 5:00 p.m.).
 - 1327
 - 1328 2. Alcoholic beverages consumed outside of the UniServ office will not be paid for
1329 by Winnebagoland dues money.

1330
1331 **(Copied to Office Procedures and Reaffirmed by WU Council 5/19/2008)**

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POSITIONS DESCRIPTIONS

Positions descriptions will be developed and reviewed annually so that they are current.
See Appendix F for current **Position Descriptions**.

1336 **STAFF TRAINING**

1337
1338 **A. SCHEDULING AND APPROVAL OF STAFF REQUESTS**

- 1339
1340 1. Scheduling of the staff to attend individual staff requested time out of the unit for
1341 training, whether as a participant (trainee) or as a facilitator (trainer), will be
1342 approved in advance by the Executive Committee.
1343
1344 2. Staff shall submit the request to attend a conference or workshop form to the
1345 Executive Committee with enough lead time for the Committee to be able to
1346 consider it prior to the conference or workshop. (See Appendix G for the **Staff**
1347 **Request to Attend a Conference or Workshop Form.**)
1348

1349 **B. REQUESTS FOR STAFF ASSISTANCE IN TRAINING**

1350
1351 If, WEAC, NEA, or other organizations, such as the WEA Insurance Group, etc.
1352 request Winnebagoland staff assistance or participation, such request(s) should be
1353 submitted to the WU President who will forward them to the
1354 Policies/Procedures/Personnel Committee for prior approval.
1355

1356 **C. FUNDING**

1357
1358 Funding beyond the Collective Bargaining Agreement allotment for training, will be
1359 submitted to the Council for consideration.
1360

1361 **D. WEAC PROFESSIONAL STAFF MEETINGS**

1362
1363 UniServ staff are expected and encouraged to attend regularly scheduled WEAC
1364 staff meetings and to voucher to WEAC appropriate expenses
1365

1366 **E. REIMBURSEMENT**

1367
1368 Reimbursement of expenses shall be approved upon verification of completion of the
1369 training.
1370

1371 **F. EMPLOYER DIRECTED TRAINING**

1372
1373 The UniServ Policies/Procedures/Personnel Committee shall provide positive
1374 assistance in correcting weaknesses not limited to suggestions and including
1375 training time and funds as well as released time for observing other staff.

STAFF EVALUATIONS AND REPORTS

A. STAFF EVALUATIONS

1. The staff shall be evaluated on at least an annual basis.
2. The Policies/Procedures/Procedures Committee shall be responsible for conducting all staff evaluations.
3. Staff evaluations shall be for the purposes of providing feedback and if necessary assistance in improving job performance.
4. Evaluations shall be based on the staff person's performance in carrying out their job responsibilities (job description) and following known employer policies and procedures.
5. The Policies/Procedures/Personnel Committee shall provide positive assistance in correcting weaknesses, not limited to, suggestions, and including training time and funds as well as released time for observing other staff.
6. All evaluations of staff shall be conducted openly and with their full knowledge.
7. Evaluation forms shall be distributed directly to the following persons:
 - a. Local Association officers
 - b. Local Association Negotiations, Contract Maintenance, and Legislative Committee Chairpersons
 - c. UniServ Council representatives
 - d. WEAC Board Directors from Winnebagoland UniServ
 - e. Up to six (6) members selected by the staff member
8. See Appendix H for the **Staff Evaluation Form** and suggested timeline.
9. All evaluations shall include a conference between the staff person and the Policies/Procedures/Personnel Committee followed by a written report. A copy of said written report shall be provided to the staff person being evaluated.
10. Within ten (10) working days the staff person shall have the opportunity to attach comments to the written report provided by the Policies/Procedures/Personnel Committee.
11. The Policies/Procedures/Personnel Committee shall submit their summary evaluation report (the written report provided for above), staff comments related to the written report and any recommendations from the Policies/Procedures/Personnel Committee to the UniServ Council at their regular May meeting.
12. The evaluation summary and response documents (if any) shall be placed in the employee's personnel file.
13. Professional Staff will not evaluate Associate Staff.

1427 **B. STAFF REPORTS**

1428

1429 Each Staff person shall report their activities in writing to the Council each month at
1430 the regular Council meeting.

PERSONNEL FILES

A. STAFF PERSONNEL FILES

A personnel file for each Professional and Associate Staff member shall be maintained in the UniServ Office under separate lock and key. Keys will be held only by the Council President and Vice President.

B. CONTENTS OF THE FILE SHALL INCLUDE WITHOUT DUPLICATION:

1. Application for employment/resume
2. Original job posting
3. Original and updated job description
4. Letter of appointment
5. First date of employment
6. Initial agreement notes
7. Copies of evaluation summaries
8. Notices to employees
9. Copies of written correspondence related to employee's assignment and job performance
10. List of credit cards, keys, phones, computer equipment and such, held on behalf of the Unit
11. Other items deemed appropriate by the Personnel Committee
12. A table of contents of the file
13. A separate folder will be kept in the file to house letters of recommendation

C. MISCELLANEOUS

1. Any new materials incorporated in files shall include date of origination.
2. The employee shall have the right to review his/her personnel file upon request to the President or Vice President. If any employee wishes an item added or removed from his/her file, he/she shall communicate this request to the Policies/Procedures/Personnel Committee. If the employee feels the request has not been satisfactorily resolved by the Committee, he/she may take the request to the Council.
3. In general, all matters contained in the personnel file should be open to review by the Employee, with the exception of letters of recommendation. Access to the files by persons other than the employee, President or Vice President shall be denied unless granted by the Council.

An appeal of this denial shall be made to the Policies/Procedures/Personnel Committee. If not resolved by the Committee an appeal of the denial may be made to the Council.

4. The Policies/Procedures/Personnel Committee shall be charged with updating the file yearly. This shall include, but not be limited to the following:
 - a. Update of Winnebagoland UniServ properties assigned to staff
 - b. Current job description per contract and Policy Handbook
 - c. Current evaluation

STAFF CONDUCT

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The continued success and growth of WU is dependent upon the effectiveness of its employees. This effectiveness, in turn, is directly related to their ability to communicate with one another in such a manner as to ensure the professional cooperation and support of all employees, the free expression and exchange of individual ideas and concerns, and the fair and timely resolution of conflict as it arises.

WU believes that the continued growth of its employees and the UniServ can be best achieved through courteous communications and maintenance of a professional demeanor.

WU can not and will not condone or tolerate conditions of a discriminatory, hostile or harassing nature. Employees shall not engage in conduct towards any other employee that tends to degrade or harass them. Employees' good judgment in this regard is required at all times.

Failure to adhere to this policy may constitute grounds for disciplinary action up to, and including, dismissal.

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INTERNAL DISPUTE RESOLUTION PROCESS

A staff person who has a problem with any other staff person(s) and is unable to resolve it in an informal manner shall follow these steps:

Steps:

1. Document the problem on the proper form and address and attempt to resolve the issue with the other staff person(s) within twenty working days. (See Appendix I for the **Internal Dispute Resolution Process** form.)
2. If the staff person initiating step 1 believes resolution has not been achieved in step 1, within five working days that staff person shall contact the UniServ President and inform the other staff person(s) involved that the process has now moved to step 3.
3. The UniServ President shall refer the dispute to the Policies/Procedures/Personnel Committee to be addressed no later than their next scheduled meeting.

CONFLICT OF INTEREST (STAFF)

It is essential that the members of the WinnebagoLand UniServ (WU) have complete confidence in the integrity of the staff of WU. In order to justify that confidence, employees shall not take any action which might result in, or create the appearance of, a conflict with the full performance of their official duties and responsibilities. The purpose of this policy is to insure a process that emphasizes openness and objectivity. Set forth below are the four Standards of Conduct that make up this policy:

A. ITEMS OF VALUE

No employee shall solicit or accept, directly or indirectly, for personal benefit, any compensation, gifts, loan, or other thing of value from any person, group, business, institution, or other organization which either has or is seeking to enter into a business relationship with WU, or has an interest which may be affected by the performance or non-performance of the employees' duties and responsibilities.

The WU President may provide for such exceptions to the above paragraph as are appropriate in view of the duties and responsibilities of particular employees or the nature of particular transactions.

For example, it may be appropriate to permit the acceptance of food, lodging, etc., in the ordinary course of a meeting or other business transaction; the acceptance of de minimus gifts such as calendars, appointment books, etc.

B. PARTICIPATION

No employee shall participate in any WU matter in which he or she has a direct or indirect private interest. For purposes of this paragraph, the term "participate" shall mean the authority, directly or indirectly, to approve, disapprove, recommend, or otherwise affect WU action; further, the interest of a spouse, minor child, or other member of the employee's immediate household shall be considered an interest of the employee.

The restraint set forth in the above paragraph shall not apply if, in the opinion of the WU President, the employee's private interest is not substantial enough to have an effect on the integrity of his or her services.

Where there is a question of conflict of interest regarding the WU President, the matter shall be brought to the immediate attention of the WU Board of Directors for determining if a conflict exists.

C. INFORMATION

Unless expressly authorized by the WU President, no employee shall, directly or indirectly, make use of or permit others to make use of any "inside" information (i.e., information obtained through the employee's employment that is not available to the general membership of the UniServ) for the purpose of furthering a private interest.

1570 **D. TRANSACTIONS**

1571

1572 No employee shall engage in any transaction, activity, or outside employment which,
1573 by its very nature, is inconsistent with the employee's official duties and
1574 responsibilities or has the appearance of a conflict of interest.

1575 **FRAUDULENT OR DISHONEST CONDUCT AND WHISTLEBLOWER POLICY**

1576
1577 **A. Introduction**
1578

1579 The Winnebagoland UniServ (WU) Council is committed to maintaining the
1580 highest standards of conduct and ethics. This Fraudulent or Dishonest Conduct
1581 and Whistleblower Policy (the “Fraud Policy”) reflects the practices and principles
1582 of behavior that support this commitment. The WU Council expects every leader
1583 and employee to read and understand this policy and its application to the
1584 performance of his or her responsibilities.
1585

1586 The WU Council will investigate any possible fraudulent or dishonest use or
1587 misuse of resources or property by governance or staff. The WU Council will take
1588 appropriate action against anyone found to have engaged in fraudulent and/or
1589 dishonest conduct, including disciplinary action, and/or civil or criminal
1590 prosecution when warranted.
1591

1592 All members of the Winnebagoland UniServ are encouraged to report possible
1593 fraudulent or dishonest conduct (i.e., to act as a “whistleblower”), pursuant to the
1594 procedures set forth in the next section.
1595

1596 **B. How To Report**
1597

1598 A member or employee’s concern about possible fraudulent or dishonest use or
1599 misuse of resources or property should be reported to the President of WU. If, for
1600 any reason, the member or employee finds it difficult to report his or her concerns
1601 to the President, he or she may communicate the concern to the President or
1602 Executive Director of the Wisconsin Education Association Council.
1603

1604 **C. Definitions**
1605

- 1606 **1. Baseless Allegations:** Allegations made with reckless disregard for their truth
1607 or falsity.
1608

1609 Individuals making false allegations may be subject to disciplinary action
1610 and/or legal claims by individuals accused of such conduct.
1611

- 1612 **2. Fraudulent or Dishonest Conduct:** A deliberate act or failure to act with the
1613 intent of obtaining an unauthorized benefit.
1614

1615 Examples of such conduct include, but are not limited to:

- 1616 **a.** forgery or alteration of documents
1617 **b.** unauthorized alteration or manipulation of computer files
1618 **c.** fraudulent financial reporting
1619 **d.** pursuit of a benefit or advantage in violation of the WU conflict of interest
1620 policy
1621 **e.** misappropriation of misuse of WU resources, such as funds, supplies or
1622 other assets
1623 **f.** authorizing or receiving compensation for goods not received or services
1624 not performed
1625 **g.** authorizing or receiving compensation for hours not worked

1626 3. Whistleblower: A member or an employee who informs the President of WU
1627 about an activity that the member or Employee believes to be fraudulent or
1628 dishonest.
1629

1630 **D. Rights and Responsibilities**

1631 1. The WU President

1632 The WU President is duty bound to report suspected fraudulent or dishonest
1633 conduct to the WU Council. Failure to forcefully enforce this policy shall be
1634 reported to the WU membership.
1635

1636 2. Reasonable care should be exercised in dealing with suspected misconduct 1637 to avoid:

- 1638 a. baseless allegations
- 1639 b. premature notice to persons suspected of misconduct and/or disclosure
1640 of suspected misconduct to others not involved with the investigation
- 1641 c. violations of a person's rights under the law

1642 Accordingly, the President who becomes aware of misconduct:

- 1643 a. Should not contact the person suspected to further investigate the matter
1644 or demand restitution.
- 1645 b. Should contact the WEAC Human Resources Director and/or WEAC
1646 General Counsel to seek assistance in the investigation process.
- 1647 c. Should not discuss the case with anyone other than the WEAC Human
1648 Resources Director and/or the WEAC General Counsel.
- 1649 d. Should not report the case to an authorized law enforcement officer
1650 without first discussing the case with the WEAC General Counsel.
- 1651 e. Should direct all inquiries from an attorney to the WEAC General
1652 Counsel.
- 1653 f. Should direct all inquiries from the media to the WEAC Director of Public
1654 Relations if appropriate.

1655 **E. Whistleblower Protection**

1656 The WU Council shall make every effort to protect whistleblowers against
1657 retaliation. Whistleblower complaints will be handled with sensitivity, discretion,
1658 and confidentiality to the extent allowed by circumstances and the law. So that
1659 the WU Council can conduct an effective investigation, whistleblower complaints
1660 will only be shared with those who have a need to know and, in appropriate
1661 cases, with law enforcement personnel.

1662 Employees of the WU may not retaliate against a whistleblower for informing the
1663 President of WU about an activity that the person believes to be fraudulent or
1664 dishonest with the intent or effect of adversely affecting the terms or conditions of
1665 the Whistleblower's employment, including, but not limited to, threats of physical
1666 harm, loss of job, punitive work assignments or impact on salary or wages.
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1675 A Whistleblower who believes he/she has been retaliated against may file a written
1676 complaint with the President of WU. Any complaint of retaliation will be promptly
1677 investigated, reported to the WU Council, and appropriate corrective measures
1678 taken if allegations of retaliation are substantiated. This protection from retaliation
1679 is not intended to prohibit the President of WU from taking action, including
1680 disciplinary action, in the usual scope of his/her duties and based on valid
1681 performance-related factors.
1682 **(5/19/08)**

APPENDICES:

- A. Office Use Request form**
- B. Office Use Agreement**
- C. Project Request form**
- D. Application by Student WEAC Chapter for Non-Budgeted Funding**
- E. Appointees to WEAC State Committees**
- F. Current Position Descriptions**
- G. Staff Request to Attend a Conference or Workshop**
- H. Staff Evaluation form and timelines**
- I. WU Internal Dispute Resolution Process form**
- J. Net Requisition form**
- K. Staff Signature form**

WU OFFICE USE REQUEST FORM

Name of Group: _____

Contact Person: _____

Address: _____

Home phone: _____ Work phone: _____

Purpose of Request: _____

Date and times needed: _____

FOR OFFICE USE ONLY

Date received: _____

Date approved: _____ Approved by: _____

Date rejected: _____ Rejected by: _____

Reason(s) for rejection: _____

GROUP CHARGES:

Utilities @ \$ _____ per ½ day or evening \$ _____

@ \$ _____ per full day \$ _____

Phone connection charges \$ _____ Actual phone charges \$ _____

TOTAL GROUP CHARGES \$ _____

WU Office Use Agreement

I have read the attached Office Use Policy and agree on behalf of my group to abide by the conditions set forward.

I have provided Winnebagoland UniServ with a deposit of \$_____, which I understand will be returned should the group comply with the conditions set forward in this Agreement.

If applicable: I agree to pay for all Phone Bank connection charges and actual phone charges.

Name: _____ Date: _____
(please print)

Signature: _____

Group: _____

Date of use of the building: _____

Address: _____

Work Phone: _____ Home Phone: _____

WU PROJECT REQUEST FORM

Name of Group: _____

Contact Person: _____

Address: _____

Home phone: _____ Work phone: _____

Purpose of Request: _____

Special Instructions: _____

Date and times needed: _____

FOR OFFICE USE ONLY

Date received:

Date approved:

Approved by:

Date rejected:

Rejected by:

Reason(s) for rejection:

TOTAL CHARGES for this project \$ _____

**APPLICATION BY STUDENT WEA CHAPTER FOR
NON-BUDGETED FUNDING**

PART I

A.) Name of Chapter: _____

B.) Description of the item: _____

C.) Chapter President: _____

D.) Location of project (if applicable): _____

E.) Date(s) (if applicable): _____

PART II

A.) Itemized Estimate of Expenses

1) _____ \$ _____

2) _____ \$ _____

3) _____ \$ _____

4) _____ \$ _____

5) _____ \$ _____

6) _____ \$ _____

Total = \$ _____

This form must be completed and approved before time and funds are committed.

WEAC COMMITTEE APPOINTMENT RECOMMENDATIONS

Name of Nominee _____

Home Address _____
(Street) (City) (State) (Zip)

Telephone H - (____) _____ W - (____) _____ Fax _____

Local Association _____ UniServ Unit _____

School District Position _____ Grade Level _____

Subject Area, if appropriate _____

Years Employed in Education as a: Teacher _____, Education Support Staff _____, or

Other (Describe) _____

Current Committee Serving On: _____ Prev. Committee Served On: _____

Minority (Optional) **This information is helpful to the President in meeting various committee requirements.**

- Black
- American Indian, Eskimo or Aleut
- Hispanic
- Asian/Pacific Islander

Please check the committee(s) to which you wish to be considered for appointment in numerical preference order:

- Constitution, Bylaws & Standing Rules
- Credentials & Elections
- Education Support Professional
- Exceptional Education
- Human Relations
- Instruction & Professional Development
- Legislative
- Wisconsin Technical College System/Vocational Technical Adult Education
- Minority Affairs
- Political Action Committee*
- Public Relations
- Resolutions
- Review Board**
- Scholarship Review***

*If applying for the **Political Action Committee**, the **Green** form must also be submitted. Nominations for the PAC must be submitted by active local PAC units in each Congressional District. A stamped, preaddressed envelope is enclosed for your convenience in returning the forms to the WEAC office.

Persons appointed to the Review Board must have been active or educational support members for five consecutive years immediately prior to appointment, and currently hold no elective or appointive position in an affiliate, UniServ, or WEAC (except RA delegate). Further, no person can be appointed to the Review Board who has been an executive officer or board member of WEAC, a UniServ unit, or an affiliate within the past three years. **(The term for Review Board members is five years.)

***Appointees to the Scholarship Review Committee cannot hold an elected position at any level of the organization.

Local Offices & Committees: _____

State Offices & Committees: _____

Other Professional Affiliations: _____

Additional Qualifications: _____

(Please use separate sheet for additional comments.)

SIGNED
(Local President, UniServ President, Student WEA President, WEAC-Retired President or Minority Caucus Chair) (In the case of a WTCS local, signature of local president)

Name _____

Title _____

Address (include City, State and Zip) _____

RETURN THIS FORM **ASAP** TO:

Office of the President
Wisconsin Education Association Council
P.O. Box 8003
Madison, WI 53708-8003

COMMITTEE RECOMMENDATIONS MUST BE SUBMITTED ON THIS FORM!!

*****PLEASE NOTE: NO FORM CAN BE ACCEPTED WITHOUT AN OFFICIAL SIGNATURE*****

CURRENT POSITION DESCRIPTIONS

Winnebagoland Job Description – Professional Staff

Name of Employee: Armin Blaufuss		Position: Winnebagoland Professional Staff Position #1
Job Title: UniServ Director		Previous Incumbent:
Job Class: Category III		Employees Performing Similar Duties: Peter Gust, John Wedge
Supervisor: Council President		
Job Function Summary: Provide overall coordination and guidance in the development and execution of the goals and objectives of the UniServ Unit by: A. Assisting member locals in matters of negotiations, professional rights and responsibilities, including grievances; B. Assisting member locals in legislative matters, political action and membership development/promotions and communications; and C. Assisting member locals in developing and sustaining Great Schools. D. Assisting the governance functions of the UniServ Council; including the budget. Serve as liaison between the NEA, WEAC and the UniServ Unit in providing and implementing UEP programs in the UniServ unit.		
Time/Priority/Responsibilities: It is recognized that the % of time spent and the prioritization of major responsibilities is a best estimate and may vary depending upon the time of the year and unexpected issues. The incumbent of the position is expected to use his/her professional judgment and discretion in consultation with affected members and leaders to best utilize his/her time and skills.		
% of Time	Priority (A, a.1, B, b.1)	Description of Major Responsibilities
	A.	Assist member locals in matters or negotiation and professional rights and responsibilities, including grievances.
	a.1	Conduct coordinated bargaining sessions for all Winnebagoland UniServ Locals.
	a.2	Assist local associations in negotiations and the resolution of impasse (mediation/arbitration, etc.)
	a.3	Investigate and make recommendations to the Director of Legal Services regarding legal support for locals and individual members.
	a.4	Assist in the processing of grievances and the representation of local associations and teachers before various governmental bodies.
	B.	Assist member locals with public relations; membership and program development/promotion and communications.
	b.1	Implement the goals of the WU UniServ PR Committee.
	b.2	Write and/or edit UniServ Publications.
	b.3	Assist local associations in program development and internal membership promotion to increase member involvement.
	b.4	Coordinate the activities of the Legislative/PAC with the chairperson of the Committee.
	C.	Assist member locals in developing and sustaining Great Schools.
	c.1	Develop new leaders at the local and UniServ council level.
	c.2	Organize President's meetings/trainings as needed.
	c.3	Develop strong affiliates.

	c.4	Build sustainable relationships with school districts and the community.
	c.5	Organize non-members and develop viable local affiliates.
	c.6	Advocate for appropriate funding of public schools.
	D.	Assist the Governance functions of the Council and leadership.
	d.1	Be available, as calendar permits, for all WU Council functions (Council meetings, RA's, Executive Committee meetings, etc.).
	d.2	Give a monthly written report to the WU UniServ Council in regards to significant activities of the Director.
	d.3	Provides calendar of monthly activities to Council.
	d.4	Assist in developing the UniServ Council budget.
	d.5	Oversee membership processing and accounting.
	d.6	Advise the Building Corporation.
	d.7	Organize Council training.
	E	Perform other Duties as assigned/requested by the Council President/Member locals

Authority and Relationships:

The UniServ Director (UD) reports to the Policies/Procedures/Personnel Committee and is supervised by the President of the Council. The UD is expected to plan, organize, prioritize and carry out his/her work with limited or no direct supervision and/or operate within policy guidelines established by governance bodies. He/she can be assigned and/or is responsible to create work that requires a high degree of creativity and originality. The UD is expected to exercise individual judgment and make "on the spot" decisions in carrying out his/her responsibilities. UD's may provide work to the associate staff that supports the director's responsibilities as established in this job description and in accordance with relevant UniServ policies and labor agreements.

Knowledge, skills and abilities:

- BA, higher degree or course work preferred
- Teaching and/or public sector labor relations/labor law experience (preferred)
- Experience as an association leader in education (local, UniServ, state, or national) or other public or private sector unions (preferred)
- Association staff experience (preferred)
- Experience in negotiations, including arbitration
- Experience in consensus/collaborative bargaining and/or site-based decision making/self-managing teams
- Experience in grievance processing and rights arbitration, including case presentation and brief writing
- Experience in public relations and community organizing
- Experience in political action
- Knowledge of school law, school finance, and educational issues
- Knowledge of computers, skill in using spreadsheets, word processing, and other software programs
- Valid driver's license
- Ability to travel, work some weekends
- Willingness to commit the time and energy necessary to meet the extensive demands of the job
- Ability to promote and adhere to the policies and procedures adopted by the Winnebago Board of Directors and Representative Assembly
- Ability to maintain the confidentiality of individual member(s) concerns in a professional and confidential manner.
- Perform all duties in a professional and competent manner

Employee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____

Please forward hard copy and electronic copy of this form to WEAC HR as soon as it is signed.

Date received in WEAC HR: _____ **By:** _____

Winnebagoland Job Description – Professional Staff

Name of Employee: John Wedge	Position: Winnebagoland Professional Staff position #2
Job Title: UniServ Director	Previous Incumbent: Richard Kern
Job Class: Category III	Employees Performing Similar Duties: Armin Blaufuss, Peter Gust

Supervisor:
Council President

Job Function Summary:

Provide overall coordination and guidance in the development and execution of the goals and objectives of the UniServ Unit by:

- A. Assisting member locals in matters of negotiations, professional rights and responsibilities, including grievances;
- B. Assisting member locals in legislative matters, political action and membership development/promotions and communications; and,
- C. Assisting member locals in developing and sustaining Great Schools.
- D. Assisting the governance functions of the UniServ Council; including the building corporation.

Serve as liaison between the NEA, WEAC and the UniServ Unit in providing and implementing UEP programs in the UniServ unit.

Time/Priority/Responsibilities:

It is recognized that the % of time spent and the prioritization of major responsibilities is a best estimate and may vary depending upon the time of the year and unexpected issues. The incumbent of the position is expected to use his/her professional judgment and discretion in consultation with affected members and leaders to best utilize his/her time and skills.

<u>% of Time</u>	<u>Priority</u> (A, a.1, B, b.1)	Description of Major Responsibilities
	A.	Assist member locals in matters or negotiation and professional rights and responsibilities, including grievances.
	a.1	Conduct coordinated bargaining sessions for all Winnebagoland UniServ Locals.
	a.2	Assist local associations in negotiations and the resolution of impasse (mediation/arbitration, etc.)
	a.3	Investigate and make recommendations to the Director of Legal Services regarding legal support for locals and individual members.
	a.4	Assist in the processing of grievances and the representation of local associations and teachers before various governmental bodies.
	B.	Assist member locals with public relations; membership and program development/promotion and communications.
	b.1	Implement the goals of the WU UniServ PR Committee.
	b.2	Write and/or edit UniServ Publications.
	b.3	Assist local associations in program development and internal membership promotion to increase member involvement.
	b.4	Coordinate the activities of the Legislative/PAC with the chairperson of the Committee.
	C	Assist member locals in developing and sustaining Great Schools.
	c.1	Develop new leaders at the local and UniServ council level.
	c.2	Organize President's meetings/trainings as needed.
	c.3	Develop strong affiliates.
	c.4	Build sustainable relationships with school districts and the community.

	c.5	Organize non-members and develop viable local affiliates.
	c.6	Advocate for appropriate funding of public schools.
	D.	Assist the Governance functions of the Council and leadership.
	d.1	Be available, as calendar permits, for all WU UniServ Council functions (Council meetings, RA's, Executive Committee meetings, etc.).
	d.2	Give a monthly written report to the WU UniServ Council in regards to significant activities of the Director.
	d.3	Provides calendar of monthly activities to Council.
	d.4	Assist in developing the UniServ Council budget.
	d.5	Oversee membership processing and accounting.
	d.6	Advise the Building Corporation.
	d.7	Organize Council training.
	E.	Perform other Duties as assigned/requested by the Council President/Member locals

Authority and Relationships:

The UniServ Director (UD) reports to the Policies/Procedures/Personnel Committee and is supervised by the President of the Council. The UD is expected to plan, organize, prioritize and carry out his/her work with limited or no direct supervision and/or operate within policy guidelines established by governance bodies. He/she can be assigned and/or is responsible to create work that requires a high degree of creativity and originality. The UD is expected to exercise individual judgment and make "on the spot" decisions in carrying out his/her responsibilities. UDs may provide work to the associate staff that supports the director's responsibilities as established in this job description and in accordance with relevant UniServ policies and labor agreements.

Knowledge, skills and abilities:

- BA, higher degree or course work preferred
- Teaching and/or public sector labor relations/labor law experience (preferred)
- Experience as an association leader in education (local, UniServ, state, or national) or other public or private sector unions (preferred)
- Association staff experience (preferred)
- Experience in negotiations, including arbitration
- Experience in consensus/collaborative bargaining and/or site-based decision making/self-managing teams
- Experience in grievance processing and rights arbitration, including case presentation and brief writing
- Experience in public relations and community organizing
- Experience in political action
- Knowledge of school law, school finance, and educational issues
- Knowledge of computers, skill in using spreadsheets, word processing, and other software programs
- Valid driver's license
- Ability to travel, work some weekends
- Willingness to commit the time and energy necessary to meet the extensive demands of the job
- Ability to promote and adhere to the policies and procedures adopted by the Winnebago Board of Directors and Representative Assembly.
- Ability to maintain the confidentiality of individual member(s) concerns in a professional and confidential manner.
- Perform all duties in a professional and competent manner.

Employee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____

Please forward hard copy and electronic copy of this form to WEAC HR as soon as it is signed.

Date received in WEAC HR: _____ **By:** _____

Winnebagoland Job Description – Professional Staff

Name of Employee: Peter Gust	Position: Winnebagoland Professional Staff position #3
Job Title: UniServ Director	Previous Incumbent: Richard Kern
Job Class: Category III	Employees Performing Similar Duties: Armin Blaufuss, John Wedge
Supervisor: Council President	

Job Function Summary:

Provide overall coordination and guidance in the development and execution of the goals and objectives of the UniServ Unit by:

- A. Assisting member locals in matters of negotiations, professional rights and responsibilities, including grievances;
- B. Assisting member locals in legislative matters, political action and membership development/promotions and communications; and,
- C. Assisting member locals in developing and sustaining Great Schools.
- D. Assisting the governance functions of the UniServ Council; including the political action fund.

Serve as liaison between the NEA, WEAC and the UniServ Unit in providing and implementing UEP programs in the UniServ unit.

Time/Priority/Responsibilities:

It is recognized that the % of time spent and the prioritization of major responsibilities is a best estimate and may vary depending upon the time of the year and unexpected issues. The incumbent of the position is expected to use his/her professional judgment and discretion in consultation with affected members and leaders to best utilize his/her time and skills.

<u>% of Time</u>	<u>Priority</u> <small>(A, a.1, B, b.1)</small>	Description of Major Responsibilities
25%	A.	Assist member locals in matters or negotiation and professional rights and responsibilities, including grievances.
	a.1	Conduct coordinated bargaining sessions for all Winnebagoland UniServ Locals.
	a.2	Assist local associations in negotiations and the resolution of impasse (mediation/arbitration, etc.)
	a.3	Investigate and make recommendations to the Director of Legal Services regarding legal support for locals and individual members.
	a.4	Assist in the processing of grievances and the representation of local associations and teachers before various governmental bodies.
	B.	Assist member locals with public relations; membership and program development/promotion and communications.
	b.1	Implement the goals of the WU UniServ PR Committee.
	b.2	Write and/or edit UniServ Publications.
	b.3	Assist local associations in program development and internal membership promotion to increase member involvement.
	b.4	Coordinate the activities of the Legislative/PAC with the chairperson of the Committee.
	C.	Assist member locals in developing and sustaining Great Schools.
	c.1	Develop new leaders at the local and UniServ council level.
	c.2	Organize President's meetings/trainings as needed.
	c.3	Develop strong affiliates.
	c.4	Build sustainable relationships with school districts and the community.

	c.5	Organize non-members and develop viable local affiliates.
	c.6	Advocate for appropriate funding of public schools.
	D.	Assist the Governance functions of the Council and leadership.
	d.1	Be available, as calendar permits, for all WU UniServ Council functions (Council meetings, RA's, Executive Committee meetings, etc.).
	d.2	Give a monthly written report to the WU UniServ Council in regards to significant activities of the Director.
	d.3	Provides calendar of monthly activities to Council.
	d.4	Assist in developing the UniServ Council budget.
	d.5	Oversee membership processing and accounting.
	d.6	Advise the Building Corporation.
	d.7	Organize Council training.
	E.	Perform other Duties as assigned/requested by the Council President/Member locals

Authority and Relationships:

The UniServ Director (UD) reports to the Policies/Procedures/Personnel Committee and is supervised by the President of the Council. The UD is expected to plan, organize, prioritize and carry out his/her work with limited or no direct supervision and/or operate within policy guidelines established by governance bodies. He/she can be assigned and/or is responsible to create work that requires a high degree of creativity and originality. The UD is expected to exercise individual judgment and make "on the spot" decisions in carrying out his/her responsibilities. UDs may provide work to the associate staff that supports the director's responsibilities as established in this job description and in accordance with relevant UniServ policies and labor agreements.

Knowledge, skills and abilities:

- BA, higher degree or course work preferred
- Teaching and/or public sector labor relations/labor law experience (preferred)
- Experience as an association leader in education (local, UniServ, state, or national) or other public or private sector unions (preferred)
- Association staff experience (preferred)
- Experience in negotiations, including arbitration
- Experience in consensus/collaborative bargaining and/or site-based decision making/self-managing teams
- Experience in grievance processing and rights arbitration, including case presentation and brief writing
- Experience in public relations and community organizing
- Experience in political action
- Knowledge of school law, school finance, and educational issues
- Knowledge of computers, skill in using spreadsheets, word processing, and other software programs
- Valid driver's license
- Ability to travel, work some weekends
- Willingness to commit the time and energy necessary to meet the extensive demands of the job
- Ability to promote and adhere to the policies and procedures adopted by the Winnebago Board of Directors and Representative Assembly.
- Ability to maintain the confidentiality of individual member(s) concerns in a professional and confidential manner.
- Perform all duties in a professional and competent manner.

Employee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____

Please forward hard copy and electronic copy of this form to WEAC HR as soon as it is signed.

Date received in WEAC HR: _____ **By:** _____

Winnebagoland Job Description – Associate Staff

Name of Employee: Kristine Rabideaux		Position: Winnebagoland Associate Staff position #1
Job Title: Staff Assistant		Previous Incumbent:
Job Class: Category C		Employees Performing Similar Duties: Kathy Spannbauer
Supervisor: Council President		
Job Function Summary: Provide administrative support to the UniServ governance, professional staff and local leaders as directed by Winnebagoland UniServ Policy.		
Time/Priority/Responsibilities:		
<u>% of Time</u>	<u>Priority</u>	<u>Description of Major Responsibilities</u>
25%	A.	Support the Winnebagoland UniServ Budget Committee.
	a.1	Accounts Payable – receive and verify invoices, formulate Net Requisitions via WEAC’s Solomon program and submit same to Treasurer for approval.
	a.2	Accounts Receivable – code appropriate charges, formulate invoice and disburse, receive check and deposit same to WEAC.
	a.3	Assist in preparing annual budget documents to include Budget Worksheet, Salary & Fringe report and budget comparables.
	a.4	Receive, format and review monthly Financial Statements; formulate YTD monthly expenditure reports.
	a.5	Formulate WEAC mileage and expense vouchers and submit the same.
	a.6	Formulate WU member mileage and expense vouchers and submit the same.
	a.7	Accounts Payable – receive and verify invoices, formulate Net Requisitions via WEAC’s Solomon program and submit same to Treasurer for approval.
25%	B.	Maintain the Winnebagoland UniServ Membership
	b.1	Maintain and update membership information via iMIDAS.
	b.2	Process new member enrollment forms.
	b.3	Receive, record, and deposit membership dues payments.
	b.4	Formulate dues records and distribute to treasurers.
	b.5	Plan & prepare materials for Treasurer’s workshop in August.
	b.6	Balance and maintain Local Association membership lists.
	b.7	Assist Treasurers with dues questions, prorations, payments & statements
25%	C.	Provide administrative support to the UniServ Professional Staff
	c.1	Mail/email correspondences on a daily basis.
	c.2	Type and proofread from a rough draft final copy all office correspondence, including, legal, statistical and arbitration exhibits.
	c.3	Assist Professional Staff with Briefs and Arbitration exhibits.
	c.4	Research, create, and distribution of district comparables using UEP resources and various educational institutional and research sources.
	c.5	Maintain Grievance Files/Member Issues database.

	c.6	Type, format and organize Training materials.
	c.7	Meetings – Type and distribute notices, log registrations on calendar, prep conference/meeting materials and room, coordinate catering services.
	c.8	File & update office periodicals, correspondences, contracts, and all hardcopy/softcopy of all correspondences.
20%	D.	Provide administrative support to the Winnebagoland Executive Committee, Council & Bargaining Caucuses
	d.1	Act as receptionist for outside visitors and business people.
	d.2	Primary phone support personnel. Answer telephones, refer callers to appropriate staff person, record messages and route same.
	d.3	Primary support to Constitution & Bylaws, PPP, Strong Affiliates, IPD Committees
	d.4	Coordinate NEA/WEAC/WU Representative Assemblies, Conferences, Seminars and Leadership meetings.
	d.5	Plan & coordinate Member Dinner and other related UniServ events.
	d.6	Assist in coordinating WU/WEAC/NEA Public Relations events
	d.7	Order and maintain materials necessary to support equipment, office needs, amenities, subscriptions, and other council authorized purchases.
	d.8	Operate and conduct daily maintenance on office equipment.
	d.9	Provide service to locals as directed by Winnebagoland UniServ policy and as time permits.
5%	E.	Perform other duties as assigned/requested by the Council President and members and/or Professional Staff.

Authority and Relationships:

The position reports to Policies/Procedures/Personnel Committee and is supervised by the President of the Council. Work may be assigned in accordance with UniServ policy and procedure by the professional staff.

Knowledge, skills and abilities:

1. Communications and interpersonal relationships with co-workers and office personnel.
2. Mastery of telephone system, email, and wide area computer communications, and general office equipment.
3. Demonstrate a high degree of proficiency in the use of computers and computer software and be able to use (or demonstrate the ability and interest to learn) a variety of PC-based software programs including word processing (Microsoft Word), fax software, database systems (Access), spreadsheets (Excel) and use of the Internet and email.
4. Sound judgment in handling conflict, complex tasks, and work-related tension.
5. Valid driver's license preferred and ability to handle out of office tasks, participate in training and support meeting activities.
6. Understand and be able to use UEP resources (NEA, WEAC, and other UniSers).
7. Understand and be able to use various educational institutional and research sources (DPI, State of WI Departments, etc)
8. Ability to promote and adhere to the policies and procedures adopted by the Winnebagoland Executive Committee and Representative Assembly.
9. Ability to maintain the confidentiality of individual member(s) concerns in a professional and confidential manner.
10. Perform all duties in a professional and competent manner.

Employee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____

Please forward a copy of this position description to WEAC HR.

Date received in WEAC HR: _____ **By:** _____

Winnebagoland Job Description – Associate Staff

Name of Employee: Kathy Spannbauer		Position: Winnebagoland Associate Staff position #2
Job Title: Staff Assistant		Previous Incumbent: Joey Roth
Job Class: Category D		Employees Performing Similar Duties: Kris Rabideaux
Supervisor: Council President		
Job Function Summary: Provide administrative support to the UniServ governance, professional staff and local leaders as directed by Winnebagoland UniServ Policy. Recommends equipment changes or purchases, conducts training on equipment and software and provides technical advice, has specific knowledge in working with database, spreadsheet, word processing and statistical survey programs.		
<u>Time/Priority/Responsibilities:</u>		
<u>% of Time</u>	<u>Priority</u>	<u>Description of Major Responsibilities</u>
25%	A.	Administer the WU computer system
	a.1	New purchase research and recommendations for all computers, peripherals, and supplies
	a.2	Installation, support, training of computer hardware/software.
	a.3	Updates for all computer software.
	a.4	Maintenance and support for Fax press hardware/software.
	a.5	New purchase research and recommendations for printers/copiers/cell phones/postage meter and other office equipment.
	a.6	Support for printers/copiers/cell phones/postage meter and other office equipment.
	a.7	UniServ website developer/administrator.
	a.8	Survey software (SurveyMonkey) create, distribute, and support.
	a.9	Support of meeting presentation hardware/software (i.e., computer presentations, sound system).
	a.10	Network administrator of Local Area Network (LAN).
25%	B.	Do total package costing for Local associations (WERC Forms)
	b.1	Creation of salary schedules for local association bargains.
	b.2	Creation of salary schedules for local association re-openers.
	b.3	District/Association comparisons of costing applications.
	b.4	Maintain/distribution of electronic versions of association costing files.
20%	C.	Research, create, and distribute association/district comparables
	c.1	Communicating with districts to collect comparable information.
	c.2	Online research for collection of comparable information.
	c.3	Communicating with WEAC/UniServs for comparable information.
	c.4	Creation of layout for comparable information.

20%	D.	Provide administrative support to the UniServ Professional Staff.
	d.1	Answer telephones, direct calls to staff, record messages and route same.
	d.2	Mail/email correspondences on a daily basis.
	d.3	WU-PAC support.
	d.4	Type and proofread from a rough draft final copy all office correspondence, including, legal, statistical and arbitration exhibits.
	d.5	Assist Professional Staff with Arbitration exhibits.
	d.6	Type, format and organize Training materials.
	d.8	File & update office periodicals, correspondences, contracts, and all hardcopy/softcopy of correspondences.
	d.9	Order and maintain materials necessary to support office needs.
5%	E.	Prepare, edit, print and distribute the UniServ newsletter
	e.1	Creation of monthly/special edition UniServ Update newsletters.
	e.2	Contact local association leaders/members for newsletter article approvals.
	e.3	Printing/counting/collating of approximately 4,000 newsletters for distribution.
5%	F.	Perform other duties as assigned/requested by the Council President, and members and/or Professional Staff.

Authority and Relationships:

The position reports to Policies/Procedures/Personnel Committee and is supervised by the President of the Council. Work may be assigned in accordance with UniServ policy and procedure by the professional staff.

Knowledge, skills and abilities:

1. Communications and interpersonal relationships with co-workers and office personnel.
2. Mastery of telephone system, email, and wide area computer communications, and general office equipment.
3. Demonstrate a high degree of proficiency in the use of computers and computer software and be able to use (or demonstrate the ability and interest to learn) a variety of PC-based software programs including word processing (Microsoft Word), fax software, database systems (Access), spreadsheets (Excel) and use of the Internet and email.
4. Sound judgment in handling conflict, complex tasks, and work-related tension.
5. Valid driver's license preferred and ability to handle out of office tasks participate in training and support meeting activities.
6. Understand and be able to use UEP resources (NEA, WEAC, and other UniSers).
7. Understand and be able to use various educational institutional and research sources (DPI, State of WI Departments, etc)
8. Ability to promote and adhere to the policies and procedures adopted by the WinnebagoLand Executive Committee and Representative Assembly.
9. Ability to maintain the confidentiality of individual member(s) concerns in a professional and confidential manner.
10. Perform all duties in a professional and competent manner.

Employee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____

Please forward a copy of this position description to WEAC HR.

Date received in WEAC HR: _____ **By:** _____

APPENDIX G

WU STAFF REQUEST TO ATTEND A CONFERENCE OR WORKSHOP

PART I

- A.) Name of Staff Member: _____
- B.) Conference or Workshop: _____
- C.) Sponsored by: _____
- D.) Location: _____
- E.) Date(s): _____

PART II

A.) Itemized Estimate of Expenses:

- 1) Registration Fee \$ _____
- 2) Mileage \$ _____
- 3) Plane Ticket \$ _____
- 4) Parking \$ _____
- 5) Shuttle/Cab \$ _____
- 6) Meals \$ _____
- 7) Lodging \$ _____
- 8) Other \$ _____

TOTAL = \$ _____

B) Amount to come from Employee's training funds: \$ _____

C) Amount requested from Employer controlled training funds: \$ _____

This form must be completed and approved before time and funds are committed.

Approved by:

UniServ President

Date

WU STAFF EVALUATION FORM AND TIMELINE

(being developed)

(Note: whatever form is developed should have a signature blank for the employees' to sign and date indicating that they have received a copy of the form. The signed and dated copy should be placed in the employee's personnel file.)

WU INTERNAL DISPUTE RESOLUTION PROCESS FORM

To: _____
INSERT NAME(S) OF OTHER EMPLOYEE(S) INVOLVED

Date: _____

Event(s) giving rise to the problem:

Remedy sought:

Employee

NET REQUISITION FORM

To be used for the purchase or replacement of equipment.

Name of requestor: _____ Date: _____

For the purchase of: _____

Description: _____

Vendor: _____

Cost: _____

Approved by: _____

Date: _____

WINNEBAGOLAND UNISERV COUNCIL (WU)

I have received a copy of the WU Policy Manual and acknowledge that I have been directed to read it.

Date of Receipt

Print Name

Signature