



**GUIDING PRINCIPLES AND EXPECTATIONS
FOR OCEA STEWARDS**

Drafted by
OCEA STEWARD ADVISORY COMMITTEE
On September 18, 2009

Revised and Approved by
OCEA BOARD OF DIRECTORS
On February 2, 2010

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INTRODUCTION

The Orange County Employees Association (OCEA) is an independent labor union founded in 1937 to advance the welfare of County employees and their families. Although initially a small local organization, OCEA has grown over the years to become one of the leading voices for working men and women throughout California and the nation. OCEA is an independent direct local affiliate of the AFL-CIO; a member of the California and Orange County Labor Federations; and a founding member of the United Employee Organizations of Orange County (UEOOC). OCEA represents approximately 18,000 members employed by the County of Orange, and by cities and special districts throughout the County.

The foundation of OCEA's success is its membership, and at the forefront of OCEA's membership are its volunteer Stewards. OCEA's Stewards are guided by OCEA's "Four Keys to Success:" Service, Member Involvement, Communication, and Visibility.

Like most important endeavors, the work of a Steward can be personally rewarding and at the same time exceptionally challenging. For example, OCEA Stewards monitor employer adherence to collective bargaining agreements, advise employees on contract provisions, confront employers over safety and other workplace issues, and represent employees in workplace grievances. Being a Steward requires an array of advanced talents including strong interpersonal skills, familiarity with our MOUs, diplomacy, sound judgment, and a high degree of personal integrity. Stewards are the front-line advisors and representatives of OCEA and should at all times uphold the values and perception of such a role.

To continue increasing the strength of the Steward leadership and OCEA, in May 2008 OCEA leadership developed the Steward Advisory Committee. OCEA Labor Relations representatives circulated applications to all OCEA Stewards, and Steward Advisory Committee members were selected from the pool of applicants. The Steward Advisory Committee is comprised of Stewards from various County and District agencies. The Committee was initially tasked with creating and developing Guiding Principles and Expectations for OCEA Stewards.

At first, the Committee developed a list of topics to address, including the selection and removal processes, recruitment, expectations, mentoring, attendance, and accountability. The Committee then continued to meet bi-weekly, volunteering many hours of their own time to consider which principles should be applicable to all Stewards. After months of hard work and commitment, the Committee completed a final set of Guiding Principles and Expectations to which all OCEA Stewards will be required to adhere. In the future the Committee will continue to address ongoing Steward issues and periodically review and propose revisions to the OCEA Steward Guiding Principles and Expectations. Like this initial effort, all revisions will be subject to the approval of the OCEA Board of Directors.

1. OCEA Steward Guiding Principles

The OCEA Steward Guiding Principles reflect OCEA's Vision – *“To be a recognized leader among labor organizations, playing a vital role in the lives of local government employees and their families, and providing a valuable resource, relevant to their contemporary needs and interests.”*

2. OCEA Steward Expectations

- ✓ Reflect and communicate OCEA's mission and vision.
- ✓ Be the front-line advocates for OCEA members and represent OCEA in the workplace.
- ✓ Maintain the confidentiality of all personnel issues and any other information conveyed to you as confidential.
- ✓ Provide fair and unbiased representation.
- ✓ Be available to co-workers.
- ✓ Be committed to your role as an OCEA Steward.
- ✓ Be a model to others by being an exemplary employee.
- ✓ Be respectful of co-workers and management.
- ✓ Communicate with and educate co-workers regarding OCEA's position on issues.
- ✓ Verify information if you are uncertain of its credibility and strive to prevent workplace rumors.
- ✓ Be a positive leader.
- ✓ Consistently support OCEA, its members, and its staff.
- ✓ Maintain current knowledge and understanding of issues that affect OCEA and its members.
- ✓ Avoid preoccupation with issues that only impact you or a small segment of co-workers.
- ✓ Be aware of the possible “big picture” implications of your approach to issues.

- ✓ Be truthful, upfront, and honest.
- ✓ Be professional.
- ✓ Abide by attendance, training, and participation standards.

A. *Attendance at Monthly Steward Meetings*

- a. Each month Stewards are required to attend one of the two monthly Steward meetings, which normally occur on the second Tuesday of each month at noon and at 5:30 p.m., as well as any scheduled bargaining-unit Steward meetings.
- b. A Steward who fails to attend shall be charged with an unexcused absence.
- c. Four (4) absences from Steward meetings during the calendar year shall automatically trigger the process described in Section 4.
- d. Leaves of absence may be granted to Stewards for sufficient cause. To request a leave of absence, a Steward must submit a completed *Steward Leave of Absence Form* to an OCEA Labor Relations Representative.
- e. In the event a Leave of Absence is granted, during the period of such leave the Steward shall be excused from compliance with the attendance requirements set forth above.

B. *Steward Training*

- a. Steward training is comprised of two sessions and is normally conducted monthly, with session one (1) and session two (2) provided on alternating months.
- b. Stewards are required to attend both sessions of Steward training within twelve (12) months of submitting a petition to become a Steward or becoming a Steward, whichever occurs last. At least one of the two training sessions must be completed within the first six (6) months of becoming a Steward.
- c. All Stewards are encouraged to attend any advanced Steward training(s) provided by OCEA staff.

- d. Stewards are required to repeat both sessions of Steward training within three (3) years from the date of completion of Steward training.
- e. Staff will maintain training attendance data to facilitate the ongoing continuing education and training of OCEA Stewards
- f. Steward training will normally include at least one (1) training session per quarter on an as-needed basis on a Saturday.

C. *Required Activities*

- a. A Steward is expected to participate in a wide range of additional labor-related activities to support OCEA and its members and to gain valuable knowledge and experience about the work of OCEA and the role of a Steward. These activities include various politically-related activities.
- b. Stewards must participate in at least one (1) of the following political activities during an election cycle:
 - 1. Phone Banking
 - 2. Precinct Walking
 - 3. OCEA Rallies
- c. Stewards must participate in at least five (5) of the following OCEA activities per year:
 - 1. Attending OCEA Site Visits
 - 2. OCEA Health Fair
 - 3. OCEA Food Drive
 - 4. OCEA Hot Doggers
 - 5. OCEA Committees (not including LMCs)
 - 6. OCEA Elections/Ratification Votes
- d. Stewards are expected to log blog entries when notified. Staff will maintain data relating to blogging.
- e. Stewards are expected to attend a portion of one OCEA Board of Directors meeting per year. The Steward must remain in attendance at least until the first recorded recess in the meeting but may remain longer or for the entirety of the meeting if they so choose.

3. Steward Selection Process

- A.** The recruitment and selection of an individual to become a Steward is coordinated through the OCEA Labor Relations staff. The process will include a preliminary interview to determine interest and qualifications prior to providing a candidate with a petition, application, and the Guiding Principles and Expectations.
- B.** In order to become a Steward, the candidate must engage coworkers and have an OCEA Steward Petition signed by either 10 members OR 10% of the eligible represented members in the candidate's *workplace* and/or current Stewards in good standing.
- C.** The Steward Advisory Committee is authorized to make the determination and identify successful candidates for Steward.

4. Steward Removal Process

- A.** A Steward may be removed for any of the following reasons:
 - a.** Violation of the Steward Commitment Form, or
 - b.** Any other conduct detrimental to OCEA.
- B.** In the event it is determined that a Steward may be subject to removal for any of the reasons set forth in Section 4.A. above, an OCEA Labor Relations Representative and the Steward will engage in the following:
 - a.** Step 1. Informal counseling to determine whether the Steward should (a) resign; (b) be removed as a Steward; or (c) remain a Steward subject to successfully completing an agreed set of conditions by a certain date.
 - b.** Step 2. If the OCEA Labor Relations Representative and Steward are unable to agree to a resolution, the matter shall be submitted to the Steward Advisory Committee for a recommendation to the OCEA Board of Directors.
 - c.** Step 3. If there is no resolution at Step 2, the matter can be appealed to the OCEA Board of Directors for final resolution.
- C.** The Steward Advisory Committee will report any removal issues to the OCEA Board of Directors through the Assistant General Manager.

5. Workplace Leaders – OCEA recognizes that there are members who for a variety of reasons cannot satisfy the requirements of the OCEA Steward despite the fact that they remain wholly supportive and committed to the OCEA Mission, Vision, and Guiding Principles. These members play an important role in the workplace as leaders, organizers, and key contacts for OCEA. Therefore, OCEA formally recognizes these workplace leaders as integral components of OCEA and as significant contributors. As such, OCEA will continue to offer training and support to these workplace leaders as well as recognition and gratitude for their efforts.

6. Steward Advisory Committee

A. *Composition of the Steward Advisory Committee*

- a. The Steward Advisory Committee will be composed of the following:
 1. One (1) Steward from the Orange County Sanitation District
 2. One (1) Steward from the Orange County Fire Authority
 3. One (1) Steward from the Orange County Superior Court
 4. Six (6) Stewards from the County of Orange
- b. The Steward Advisory Committee will have no more than two (2) Stewards from any one (1) agency/department.

B. *Selection Process*

- a. Candidates for the Steward Advisory Committee shall be nominated by:
 1. Self nomination
 2. Current OCEA Stewards
- b. Current members of the OCEA Board of Directors shall not be members of the OCEA Steward Advisory Committee.
- c. The Steward Advisory Committee shall be elected by Stewards in attendance at the Steward meetings for the month designated as the election month. Notice of the election and a list of candidates shall be communicated to all Stewards at least two (2) weeks prior to the election.

- d. Steward Advisory Committee members shall serve two-year terms and shall be elected in alternating years.
 - 1. Five (5) positions shall be elected during odd-numbered years.
 - 2. Four (4) positions shall be elected during even-numbered years.
- e. The Steward Advisory Committee will meet quarterly or as its members shall otherwise determine at the direction of the Board of Directors.

Respectfully submitted,

OCEA STEWARD ADVISORY COMMITTEE

Coach Bennett, Sheriff's Department

Eva Burdett, OCCR - HCS

Carolyn Gregor, Superior Court

Jeff Robbins, Fire Authority

Linda Romo, District Attorney's Office

Maira Sullivan, Orange County Sanitation District

Mike Torley, Sheriff's Department

Ray Yarbrough, Probation Department



STEWARD NOMINATION PETITION

Dear OCEA Member,

In order to become an OCEA Steward, you must receive support from ten (10) co-workers who are members of OCEA or percent (10%) of the OCEA members within your department or agency.

If you have any additional questions on the process, please contact your OCEA Labor Relations Representatives.

Once you have the petition completed, please return to OCEA:

**OCEA
830 N. Ross Street
Santa Ana, CA 92701
Fax: (714) 835-7654**

Sincerely,

ORANGE COUNTY EMPLOYEES ASSOCIATION



ORANGE COUNTY EMPLOYEES ASSOCIATION

830 N. ROSS ST., SANTA ANA, CA 92701; (714) 835-3355; FAX (714) 835-7654

Steward Leave of Absence Form

Name: _____

Phone Number: _____ Department: _____

Type of Absence:

- Sick Vacation Other
 Military Jury Duty

Anticipated Time of Absence: _____

Additional information in support of my request for a leave of absence:

Approved by Steward Advisory Committee

Date