AFSCME
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OFFICERS HANDBOOK



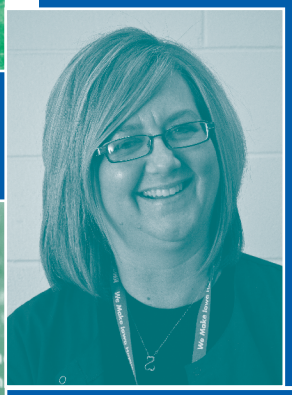














A Guide for Local Union Leaders

Updated May 2017

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Table of Contents

A Letter from the Officers 2

Preface: Our Union's Mission, Our Members' Rights 4

Section 1: The Power to Win Plan and the 21st Century Local Union 6

Section 2: Officer Duties and Ethics 10

Section 3: Strategic Planning for Strong, Effective Locals 17

Section 4: Motivating and Activating the Membership 24

Section 5: Local Union Structure and Committees 31

Section 6: Working as an Effective Leadership Team 40

Section 7: Making Union Meetings Work 44

Section 8: Structure of AFSCME 51

Section 9: International Union Resources 55

Section 10: An AFSCME History Timeline 63

Appendix A: Sample Local Monthly Financial Report 68

Appendix B: Sample Local Meeting Minutes 69

Appendix C: Glossary of Labor Terms 71

Appendix D: A Union Leader's Bookshelf (and Other Resources) 74

Appendix E: Sample Orientation Kit 77

Appendix F: How to Chair a Meeting 78

A Letter from the Officers

Congratulations on being elected as an officer or executive board member in your AFSCME local union!

This is an exciting – and challenging – time to be an AFSCME leader. In too many states, our members are still fighting layoffs and furloughs while vital services are cut. Working families continue to suffer massive job losses and home foreclosures. Corporate-backed politicians are cutting the hard-earned pensions and health care benefits of working women and men who keep our communities strong and safe.

Facing such coordinated and unprecedented attacks, AFSCME members must stand in solidarity and make our voices heard. We must pull together to build a union that's strong enough to protect our rights, and powerful enough to improve the lives and working conditions of members, potential members and all working families.

We must pull together at every level of our union — in the workplaces, the shop floors, the bus yards, the hospital wards, the cellblocks, the office buildings, the homes and all the places where members are represented by your locals.

The most important person in this quest to make the lives of workers better — both on and off the job — is you, the local union leader, together with your local union executive board. To effectively meet the enormous challenges that face you, you must work together as a team.

Being a local union leader is so much more than simply filing a grievance, and no matter what task you are undertaking, you should have these questions foremost in your mind: "How can we make our local stronger?" and "What can we do to build a more powerful local?" When you are conducting a local meeting, reaching out and communicating with members, finding ways for members to participate in their union, laying out a newsletter, putting together a communications strategy or conducting a membership drive or a voter registration campaign — always ask yourself, "How can we use this opportunity to make our local a louder voice, a stronger vehicle to improve the lives of members and workers?"

Strong unions come about when the membership is informed, educated and active. Therefore, the most effective local union leaders are those who constantly search for new ways to involve the rank and file as truly active participants in conducting the union's business.

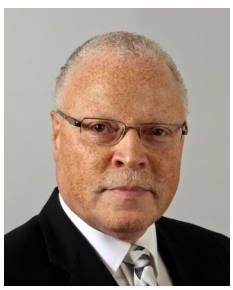
This AFSCME Officers Handbook will help you meet the challenges and make the most of the opportunities that lie before you. It is a practical guide that contains tips and "food for thought" on how to meet your important responsibilities. The handbook is a companion to the AFSCME Local Union Leadership Academy. For more information about the Academy, please contact your council or the national union.

We are AFSCME. We care for America's children, nurse the sick, plow the streets, collect the trash, walk the beat on the streets and in our prisons, and so much more. We make America happen and we take great pride in our work. We also take tremendous pride in our union.

Being a local union officer is a critically important job, and we know it is sometimes a difficult one. We thank you for your commitment, dedication and hard work. With our shared goals and hope for the future, we are confident that your service as an officer of AFSCME will be a rewarding and successful experience.

In solidarity,

Lee Saunders
President



Elissa McBride
Secretary-Treasurer



Preface: Our Union's Mission, Our Members' Rights

The work of AFSCME local union officers rests on two pillars: AFSCME's mission as a union and the rights enjoyed by all AFSCME members. Both of these pillars are found in the AFSCME International Constitution, and they are guiding lights in the day-to-day activities of local union officers. The union's mission is the destination. The rights of members represent the union's values, and they fuel the union's drive toward meeting its mission.

AFSCME's Mission

The mission of our union is spelled out in Article II of the International Constitution, and it includes:

- Organizing workers, in general and public service employees, specifically;
- Promoting the welfare of AFSCME members and providing a voice in determining the terms and conditions of employment by using the collective bargaining process, as well as legislative and political action;
- Promoting civil service legislation and career service in government;
- Assisting AFSCME members and affiliates through research and education;
- Fostering cooperation among affiliates;
- Cooperating with labor organizations and other groups toward the goals of a just distribution of America's material riches and a realization of the moral promise of American life;
- Working with union members in other countries toward improving the lives and workplaces of workers across the globe, reducing the use of armed force in resolving disputes and fostering solidarity among all workers.

The Rights of AFSCME Members

As guaranteed by the Bill of Rights for Union Members in the International Constitution, all AFSCME members have the right to:

- Join/become members regardless of race, creed, color, national origin, sex, age, sexual orientation, disability or political belief;
- Exercise freedom of speech in union affairs;
- Conduct the union's business free from employer domination;
- Expect fair and democratic elections;
- Run for and hold union office;
- Receive a full accounting of all union funds;
- Participate fully, through discussion and vote, in the union's decision-making processes;
- Receive due process and a fair trial (when charges are made against an officer or member based on grounds provided in the International Constitution).

"Where, after all, do universal human rights begin? In small places, close to home…the factory, farm or office…. Unless these rights have meaning there, they have little meaning anywhere."

— Eleanor Roosevelt, author,
"Universal Declaration of Human Rights"



Section 1: The Power to Win Plan and the 21st Century Local Union

"Leadership is about committing to that which has not yet happened."

— Roger Nierenberg, orchestra conductor

In 2006, delegates to the 37th International Convention adopted the 21st Century Power to Win plan. The plan is a road map for AFSCME leaders to build a strong union and win victories for public service workers at the local, state and national level.

The priorities of this plan include: increasing the union's membership; strengthening our political power; and building the strength needed by every council and local to be successful in organizing and politics and at the bargaining table; and, above all, getting more members involved in their union. Following are some of the plan's specific goals:



Strong, effective local unions are the foundation of the Power to Win plan. A model of a 21st Century Local Union is below. A checklist for 21st Century Locals is on the next page.



AFSCME 21st Century Local Union Checklist — from the Local Union Leadership Academy

Capacity Building

Does your local have at least one steward for every 20 workers?

Yes ❑ No ❑

Does your local have a one-to-one structure for communication and mobilization — to hear from and share information with members?

Yes ❑ No ❑

Does your local have a website and/or regularly publish a newsletter?

Yes ❑ No ❑

Can members contact you 24/7 through e-mails or voice mail?

Yes ❑ No ❑

Does your local conduct new member orientations?

Yes ❑ No ❑

Do you bargain jointly with other local unions with the same employer?

Yes ❑ No ❑

Is your local affiliated with your local AFL-CIO?

Yes ❑ No ❑

Is the local's leadership diverse and representative of the membership?

Yes ❑ No ❑

Organizing

Are at least 90 percent of employees in your bargaining unit signed up as members?

Yes ❑ No ❑

Does your local identify unrepresented titles with your employer that could be organized?

Yes ❑ No ❑

Does your local recruit volunteer member organizers?

Yes ❑ No ❑

Political Action

Are at least 90 percent of your members registered to vote?

Yes ❑ No ❑

Do at least 90 percent of registered members go to the polls on Election Day?

Yes ❑ No ❑

Are at least 25 percent of your members on MVP PEOPLE check-off?

Yes ❑ No ❑

Do you know your local/state elected officials on a first-name basis?

Yes ❑ No ❑

Does your local have the year-round capacity to mobilize members for office visits, letters, faxes and e-mails to elected officials?

Yes ❑ No ❑

Can your local turn out at least 2 percent of its members to work in elections and at least 3 percent of its members to work on Election Day?

Yes ❑ No ❑

Section 2: Officer Duties and Ethics

Oath of Office

I, _____, promise and pledge that I will perform faithfully and with honor the duties of the office which I now assume in the American Federation of State, County and Municipal Employees. I pledge to fight for a society where all workers can seek economic and social justice through participation in their union and our democracy. I will work for these goals by organizing unorganized workers, mobilizing workers to participate in the political process and fighting to gain and defend the best possible working standards through contracts and legislation. I acknowledge that it is a privilege to serve in this office, and I promise that I will deliver to my successor in office all books, papers and other property of this union which are in my possession at the close of my official term.

The above Oath of Office, found in the AFSCME Constitution, reflects the seriousness of the duties and responsibilities of the AFSCME local union officer. In this section you will find details regarding responsibilities for each officer of the local union, along with financial standards and ethical guidance.

Each local union officer has specific duties, which are described in the local's constitution. The standard constitution for local unions, which is found in Appendix C of the International Constitution, lists those duties for each officer. (A local union may adopt its own constitution, which must conform to the provisions of the International Constitution and which must be approved in writing by the International president.)

In addition, the AFSCME Financial Standards Code contains a list of financial duties for each officer. (See page 23-24 in the appendices to the Code.) You can find the International Constitution and the AFSCME Financial Standards Code online at **afscme.org/publications** in the Governance section.

Some guidelines covering responsibilities of each office are presented below.

The President's Constitutional Duties

- Preside over all membership and executive board meetings;
- Be a member of all local committees, except the election committee;
- Counter-sign checks drawn against the local's funds;

- Appoint all the local's committees (subject to the executive board's approval);
- Periodically report to the membership on the "state of the local."

In addition to his or her constitutional duties, the president, as the chief officer in the local, regularly takes on other roles and responsibilities. As the spokesperson of the union leadership to the rank-and-file membership, the president should regularly communicate the union's vision, direction and goals. The president must also be a good listener and should seek out the views and ideas of fellow officers as well as those of the membership. The president's role is like that of a team captain, one who can focus on issues and problems and motivate people to work together toward achieving common goals. The president is also the union's representative to the community. Finally, the president is the union's ceremonial officer on such occasions as initiation of new members or installation of newly elected officers.

The Vice President's Constitutional Duties

- Assist the president;
- Preside at meetings and perform other duties of the president when the president is unable to do so;
- May be authorized (by the executive board) to counter-sign checks.

In many locals the vice president is the chairperson of a prominent standing committee, such as the grievance committee. This provides a direct link from the executive board to the work of an important committee. The vice president can serve as a stand-in for the president in such roles as ceremonial officer or representative to the community.

The Secretary-Treasurer's Constitutional Duties

- Receive and deposit in a bank all of the local's money;
- Prepare and co-sign checks for the local's expenditures;
- Submit a monthly membership report to the International Union and see that the monthly per capita tax payment is made (Note: In most councils, these functions are performed for the locals by the council);
- Prepare a written monthly report of the local's financial transactions;
- Act as custodian of the local's property;
- Give a surety bond through the International Union;
- Submit any required financial reports to the International Union.

Note: If your local is large enough to have a bookkeeper, the function of the secretary-treasurer is to oversee the functions above.

The AFSCME Financial Standards Code establishes the minimum standards for keeping local union financial records. All expenditures must be for legitimate union purposes. The local's money can be spent only with proper authorization; that is by a vote of the membership or executive board. (Payments required by law or the union's constitution require no further authorization.)

The monthly financial report contains a statement of income for the month, expenses paid during the month, the local's cash assets and a list of any unpaid obligations as of the end of the month. Appendix A contains a Sample Local Monthly Financial Report. This is a minimal report that meets the requirements of the constitution. Locals that have the capacity are encouraged to prepare more detailed financial reports. See examples on pages 47-50 of the AFSCME Financial Standards Code. The local union's annual financial report allows a local officer to review and evaluate the local's financial practices.

The International Constitution requires that all local union officers and employees be bonded through the International Union for no less than 10 percent of the local's assets. A $2,500 bond is the minimum issued by the International Union. The local's secretary-treasurer must notify the International secretary-treasurer, on forms provided by the International, of the amount of the local's annual assets. The International Union then bills the local for the cost of the bond.



RESOURCE ALERT! AFSCME Secretary-Treasurer's Educational Workshop The AFSCME Secretary-Treasurer's Workshop is a day-long session covering the essentials for the secretary-treasurer and financial guidance for all local union officers. This program is recommended not only for secretary-treasurers, but for all officers, executive board members and trustees. To schedule a workshop, contact your council or parent local.

The Recording Secretary's Constitutional Duties

- Keep a record (minutes) of membership and executive board meetings;
- Handle the local's official correspondence.

Minutes are a brief record of what occurred at a meeting and should include officer and committee reports, as well as motions that were discussed and those that were passed (see Appendix B: Sample Local Meeting Minutes). These should be written up and distributed as soon as possible after a meeting. A copy of the monthly financial report should be attached to the minutes and kept on file. Correspondence the executive board considers important should be read at the membership meeting.

The Trustees' Constitutional Duties

- At least annually, audit the local's finances (or oversee an audit) and report the audit's results to the membership.

Trustees may arrange for the annual audit to be conducted by a certified public accountant (CPA). Trustees conducting their own audit should consult the Trustees Audit Guide on pages 51-59 of the AFSCME Financial Standards Code. Once completed, copies of the audit should be reviewed by the executive board and discussed at the membership meeting. A copy should be sent to the International secretary-treasurer. Because their sole function is to guarantee the members' "right to a full and clear accounting of all union funds," the trustees must be independent and are not voting members of the executive board.

On the following page is a reference sheet of Local Union Officer Duties.

Local Union Officer Duties Per AFSCME Constitution

Duties and Responsibilities	Officer Responsible
Chairs local union membership meetings	President
Presides at meetings of the Executive Board (E-Board)	President
Is a member of all committees (except the Elections Committee)	President
Counter-signs checks drawn on the local's funds	President
Appoints all standing and special committees	President
Reports to membership on official acts, standing of local, actions taken by the E-Board	President
Assists the president in the work of the president's office	Vice-President
If E-Board approves, co-signs checks in place of president or sec-treas.	Vice-President
When president is absent/unable to serve, carries out president's duties	Vice-President
Keeps minutes of membership meetings	Recording Secretary
Keeps minutes of E-Board meetings	Recording Secretary
Writes and answers local's correspondence, unless E-Board says otherwise	Recording Secretary
Performs other duties that E-Board may require	Recording Secretary
Receives money for the local	Secretary-Treasurer
Writes receipts for money received by the local	Secretary-Treasurer
Deposits in a bank any money received by the local	Secretary-Treasurer
Signs checks drawn on the local's funds	Secretary-Treasurer
Writes checks required by the constitution or authorized by membership or the E-Board	Secretary-Treasurer
Prepares and submits monthly membership reports to the International union	Secretary-Treasurer
Sends monthly per capita payment to the International secretary-treasurer	Secretary-Treasurer
Keeps the local's financial records	Secretary-Treasurer
Submits to the membership a monthly financial operating statement	Secretary-Treasurer
Acts as custodian of local union property	Secretary-Treasurer
Sees that financial reports required by the constitution are sent to the International	Secretary-Treasurer
Responsible for conducting audit of local's finances, at least semi-annually	Trustees
Reports to membership on results of each audit of local's finances	Trustees
Are not members of the E-Board	Trustees
Governs the local except when membership meetings are in session	Executive Board
Makes decisions on policies, aims and means of accomplishing the purposes of the local when not provided for in the constitution or by membership action	Executive Board
Meets as specified in the local's constitution and at call of president or a majority of the E-Board	Executive Board
Approves appointments to the local's standing and special committees	Executive Board
Selects the bank where local funds are deposited	Executive Board
Requires a majority of members for a quorum at meetings	Executive Board

Every local union officer is a steward of the union's resources. No matter what role you play and what your specific responsibilities are, you must also be an ethical leader of the union. Here are some tips to guide you.

Some Tips for the Ethical Union Leader

- **Have you reviewed the AFSCME Financial Standards Code and the local constitution?**
- **Are you aware of the AFSCME Local Union Election Manual?**
- **Are all expenditures made by your union for a legitimate union purpose and authorized by the membership body or executive board?**
- **Are minutes clearly showing these authorizations being kept up to date?**
- **Are full monthly financial reports being made?**
- **Are receipts or other documentation provided for any reimbursed expenses?**
- **Are the union's financial records audited in accordance with the constitution?**
- **Do <u>you</u> speak up when you spot a "questionable" practice or hear one being suggested by someone else?**



Leadership Responsibilities: Got-to-Do's vs. Ought-to-Do's

So far, this section has focused on the **administrative responsibilities** of local union officers and executive board members: the "got-to-do's." Many of these tasks are required by law or have fixed deadlines — they drive themselves.

Typical administrative tasks include:

- Negotiating collective bargaining agreements;
- Handling grievances and arbitrations;
- Conducting labor-management meetings;
- Chairing membership and executive board meetings;
- Coordinating the work of the standing and special committees;
- Maintaining reports and records of local's activities.

But local union leaders also have **leadership responsibilities:** the "ought-to-do's." These are the tasks that build the organization and lay the groundwork for future growth and success. Effective leaders include these kinds of tasks among their priorities, along with their administrative roles.

Typical leadership tasks include:

- Creating a one-on-one communication structure;
- Recruiting members to become involved in the union's activities;
- Educating members on issues/problems facing the union through meetings, newsletters and e-mails;
- Creating opportunities for membership activity (e.g. for job actions, legislative campaigns and/or PEOPLE drives);
- Organizing non-members and unrepresented workers;
- Self-assessments and planning.

The remainder of this handbook provides guidance on the leadership responsibilities of local union officers. The future of AFSCME, and the labor movement, depends on your leadership!

Section 3: Strategic Planning for Strong, Effective Locals

"Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat."

— Sun Tzu, "The Art of War"

Section 1 of this handbook described what a strong, effective local union looks like. Among other things, it has stewards for every work area and shift, strong communication with members and non-members, regular meetings, respect for the constitution and most importantly, an active and engaged membership. That is an awesome responsibility. Clearly, there's no way to accomplish all this without a plan.

That's where the local leadership team comes in — while every local union officer has his or her own specific constitutional responsibilities (covered in Section 2), the local union executive board has the collective responsibility to provide vision and direction for the local. It is up to the leadership team to look ahead, set goals to create a stronger, more effective local union and develop a plan to make it happen. This is sometimes referred to as strategic planning.

Strategic planning is the establishment of a proactive plan that takes these questions into account:

- Where are we now as a local?
- Where do we want to be?
- When do we want to get there?
- What changes will we have to make in order to succeed?
- How are we going to make it happen?
- Who is going to do the work?

Often local leaders get so caught up in the day-to-day, time-consuming administrative duties of their office (holding meetings, processing grievances, maintaining financial records, etc.) that they don't take the time to step back, take the long view and develop a plan. However, setting goals and developing a plan are critical if we want to build strong locals. And it doesn't have to be hard.

A Vision for the Future

The first step in strategic planning is to develop a vision of the strong, effective local you want to build. To begin this process, many locals first refer to the Power to Win plan, which lays out a vision for a strong, powerful union at all levels — local, state and national.

A vision statement is a compelling picture of your local's future — it describes where your local is going. Your vision should serve to motivate and excite your members, officers, staff and any other group you need to engage in the fulfillment of your vision. To develop a vision for your local union, the leadership team can begin by having a conversation about what kind of local union you want to build. Where do you want your local to be in five years? Ten years? What would be different? What would be the same? Can you paint a compelling picture of the future you want to achieve?

Some locals also have a mission statement, which describes who you are as a union, why you exist and what values you embrace. A well-crafted mission statement helps assure a greater unity of purpose throughout the local. The best mission statement is a short paragraph of three or four sentences, or a short list of bullet points.

A sample mission statement is as follows:

> Local 987654 exists to represent the interests at work of the employees of Happyville. The local accomplishes this through the collective bargaining process, in conjunction with the exercise of political action, growth and community involvement, all carried out transparently with the involvement of the members and leadership of the local to produce a just and rewarding workplace.

The vision and the mission serve as a foundation for the rest of the strategic plan. Once you have clarified where you are going (vision) and who you are (mission), you can move on to set shorter term goals and develop a plan of action to achieve them.

Strategic Planning — Five Steps for Success

1. SET GOALS. Develop some short-term goals that will move you toward your long-term vision. Start by completing the Local Union Checklist on page 8-9). Set SMART goals (see page 21).

2. ESTABLISH PRIORITIES. Decide which goal(s) you first want to tackle by asking, "What is most important to our local's success? What is most urgent? Where can we succeed?"

3. DEVELOP ACTION PLANS. For each goal, specify what steps must be taken, by when, by whom and how. Consider what resources you will need (people, expertise, funds). An action plan template is on page 23.

4. IMPLEMENT YOUR PLAN. Put it in motion!



5. ASSESS YOUR PROGRESS. At every meeting, discuss your goals, plans and progress. This will help you stay on track and make adjustments as needed. Then, go back to step one: set new goals or adjust the ones you have already set.

Here are some good questions to use to assess your progress towards goals:

- What did we get right?
- What helped us succeed?
- What did we fail to take into consideration?
- What should we do differently next time?

Below is a diagram that shows you how all the elements of strategic planning fit together:



S.M.A.R.T. Goals

To ensure success, make sure your goals and objectives are SMART:

Specific	Identify a specific result or outcome to be achieved
Measurable	Be able to quantify — and verify — the results
Assignable	Determine who will do it
Realistic	Offer a challenge that is within the power of the group to attain
Time-based	Specify when the result will be achieved

Examples of Vague and SMART Goals

Vague	SMART
Increase the number of stewards in the Maintenance Department	Have the chief steward recruit and train three new stewards in the Maintenance Department by May 1
Improve communication with members	Appoint a three-member newsletter committee by April 1 to produce and distribute a two-page monthly newsletter, beginning on June 1
Increase political involvement	Increase participation in the PEOPLE program to 25 percent by August 1
Improve attendance at membership meetings	Have each officer and each steward bring one new member to the August 15 membership meeting

From Goals to a Plan of Action

As described earlier, strategic planning is a five-step process:

- Set goals;
- Establish priorities;
- Develop action plans;
- Implement your plan;
- Assess your progress and set new goals.

The most important of these steps is the development of a clear and detailed action plan. The plan should contain specific details of the tasks to be completed, the deadline for their achievement and who is responsible for each task. (See below and opposite page for a sample action plan and a local union action plan template).

SAMPLE ACTION PLAN

Goal: A) To assemble and distribute an Employee Information Kit to all 180 members of the bargaining unit; and B) to create a system so all future new employees are given an orientation kit within five days of their date of hire. (See Appendix E for a sample orientation kit.)

Task	Deadline	Person Responsible
Obtain an up-to-date list of all members of the bargaining unit	April 14	Carol (secretary-treasurer)
Map and chart the location and shift of all bargaining unit members	April 30	15 MAT leaders and Willa (MAT captain)
Finalize make-up of MATs	May 15	MAT leaders and captain
Develop or obtain materials for the kit		
Letter from local president	May 15	Rachel (president)
Local constitution	May 15	Julio (secretary)
Contract	May 15	Dan (vice president)
Weingarten rights cards	May 15	Maria (chief steward)
PEOPLE check-off cards	May 15	Jeff (PEOPLE chair)
List of local officers and stewards	May 15	Mac (board member)
Local newsletters	May 15	Jane (newsletter editor)
Assemble kits	May 20	MAT leaders and captain
Distribute kits to MAT leaders	May 25	Willa (MAT captain)
Complete distribution to all members	May 31	15 MAT leaders

LOCAL UNION ACTION PLAN TEMPLATE

Objective: _____

What Action	By Whom	By When	Resources Needed	Desired Result
1				
2				
3				
4				
5				
6				
7				

Section 4: Motivating and Activating the Membership

"Let the workers organize. Let their crystallized voice proclaim their injustices and demand their privileges."

— John L. Lewis, founder, Congress of Industrial Organizations (CIO)

The primary responsibility of union leadership teams is to develop strong, effective local unions. A variety of factors play a role in this, and by far the most important is an active and engaged membership. Whether members are signing a petition, voting in an election, coming to meetings or writing letters to the editor — an active union is a strong union. And without a doubt, strong communication is critical to increasing member participation.



Communicate to Motivate

Local union leaders communicate with the membership for a number of reasons — to inform, to educate and to learn from the members what's on their minds. There is one reason to communicate that should always be paramount — and that is to encourage, to motivate and to inspire members **to act.**

There are a number of different ways that local leaders can communicate with the membership. These include:

- Talking with members one-on-one;
- Holding regular membership meetings;
- Setting up small-group worksite meetings;
- Distributing regular newsletters;
- Communicating through e-mails, texts and websites;
- Informing through other publications such as leaflets and letters;
- Posting updated information on bulletin boards.

All of these methods have a place in a local's communication system. However, one method far surpasses the others: one-on-one, face to face. One-on-ones are especially helpful when the goal is to motivate workers to take action, such as to join the union, sign a petition or letter to a legislator, participate in an action, attend an upcoming meeting or participate in a lobby day.

The benefits of one-on-one communication are plentiful:

- It puts a "face" on the union;
- It provides immediate opportunity for feedback and dialogue;
- It builds connection, relationships and solidarity among members;
- It educates officers and leaders about issues and problems affecting members.

Five Steps of One-on-One Communication

1. Introduce yourself to the worker and explain why you are talking with him/her.
2. Use active listening skills to find out about the worker and his/her issues and concerns.
    - Ask questions such as: How are things going on the job? What are things the worker is happy with and/or feels need to be improved? How does he/she feel about a particular issue that you are speaking about (i.e., a political issue, a problem at work)?
3. Educate about the union and what can be done to build power and solve problems.
    - "If we take up this issue as a group, management (or the legislature) will be more likely to listen."
    - "Standing together, we can take an active role in improving our jobs."
    - If you are speaking with the worker about a political issue, explain how it affects the workforce.
4. Ask the worker to participate. Examples include:
    - Who else is affected by this issue? Will you introduce me to them?
    - Will you come to a meeting next Tuesday? Will you ask _____ to join us?
    - Can I get your e-mail address and phone number so I can keep in touch with you?
    - Will you sign this postcard/petition?
    - (If possible, give the worker a choice of actions to take and connect the task to an issue or problem he/she cares about).



5. Get a specific commitment.

- Remember to follow up on the commitment!
- And later, recognize the worker's contribution and ask him/her to take action again.

NOTE! It's important that local leaders and stewards not only communicate with members, but also with non-members in their bargaining unit. By communicating with non-members, leaders learn more about what non-members care about, educate them about the union's efforts and successes, and ultimately, encourage them to join the union.

The challenges of reaching all workers one-on-one are noteworthy:

- It takes time.
- It is difficult in locals with multiple work locations and shifts.
- Often, locals simply don't have enough union activists to readily communicate with each worker one-on-one.

The solution to these challenges requires planning and commitment, but it is worth the effort. One-on-one communication and mobilization works best when you create a structure, sometimes called a Member Action Team (MAT).

What is a MAT?

Simply put, a Member Action Team is an activist network that communicates with the workforce and mobilizes it around issues people care about. In essence, a MAT is a means of taking the union to work: making the union visible and active in the workplace.

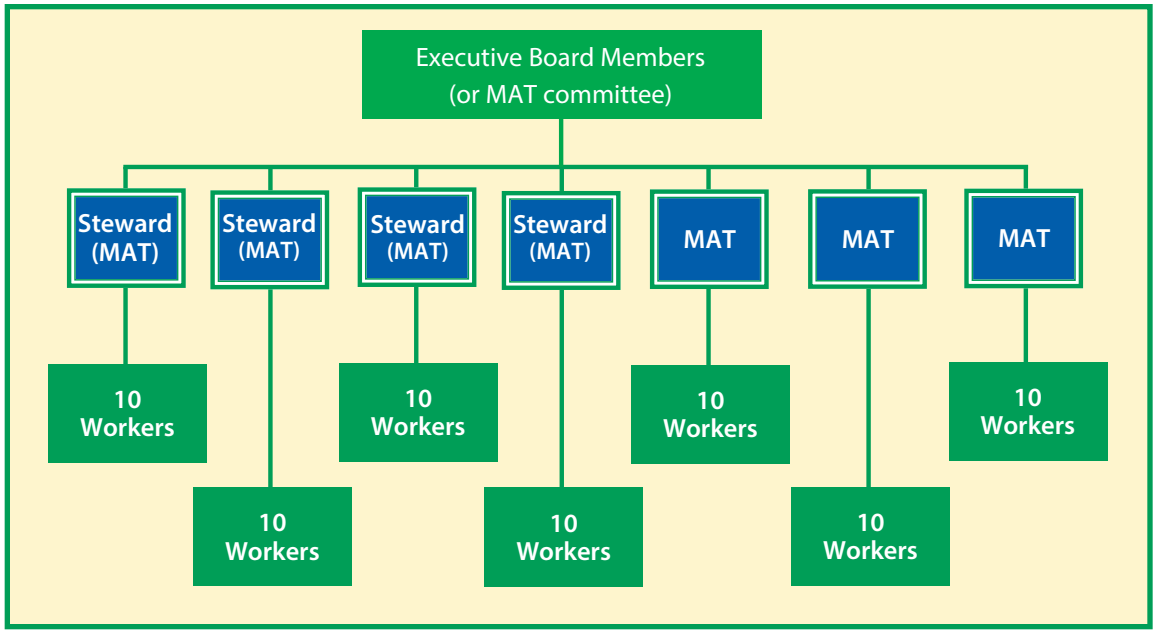
Each MAT consists of a MAT leader who is responsible for regularly communicating with approximately 10 workers. When putting a MAT structure in place, keep in mind that local leaders and stewards should have a place in the system. MAT leaders don't have to be stewards, but all stewards should be MAT leaders. MAT leaders should reflect the diversity of the local's membership — by gender, race, age, job classifications, shifts and so on.



MAT Leader Responsibilities

- Communicate regularly with approximately 10 specific co-workers (less or more depending on the size of the department or worksite).
- Distribute written communications such as union newsletters, flyers, etc.
- Listen to co-workers and learn their issues, problems and concerns.
- Educate and inform workers on issues that affect them.
- Ask workers for their ideas on how to solve a problem and help develop a plan.
- Motivate and mobilize members to participate in their action plan on an issue.
- Work together with local officers and other MAT leaders on issues that affect the local as a whole, such as increasing membership, political action or PEOPLE.
- Turn out members to union meetings or other union events, such as lobby days.
- Sign up new members and provide one-on-one orientation.
- Support union goals and values.

MAT Structure



How Does the MAT System Work?

To implement a MAT structure — and reap its rewards — local leaders must have a commitment and a plan. Here's how to build a MAT system in seven easy steps:

1. Map or chart all of the local's worksites — the map should be a physical layout and contain:
   - Who — names of workers;
   - Where — location of workers;
   - When — shifts of workers;
   - Whether or not workers are union members;
   - Where current union leaders and activists are located.
2. Each leader — officer, executive board member and steward — identifies 10 co-workers to be part of his or her Member Action Team.
3. Brainstorm to identify other possible MAT leaders, especially in work areas where there are "holes" in union leadership/activism. Consider going deeper into the membership than you have in the past and recruiting people who have played little role in the union. In particular, look for:
   - Good communicators;
   - Natural leaders in the workplace;
   - People who are respected by co-workers.
4. Approach and recruit new MAT leaders and help them establish their MAT teams.
5. Decide on a common communication task — distribute a questionnaire, hand out a leaflet, etc. — and ask each MAT leader to have a one-on-one conversation with each of his or her 10 co-workers.
6. Meet regularly to continue to build the MAT network, communicate with and mobilize members, and monitor and evaluate the network's effectiveness.
7. Hold MAT leader training using the Power@Work module, a simple training and DVD that can be obtained by contacting the AFSCME Education Department: **education@afscme.org**.

Once in place, a MAT system can be used for its main purpose: to communicate with members and motivate them to take action on issues they care about. But not all issues are ideal for member mobilization. Use the Campaign Planning Worksheet on the right to analyze and to help determine what course of action you should take on a given issue.

Campaign Planning Worksheet

1. Describe the workplace problem, or issue, where it exists and who (and how many) it affects.

2. Can you honestly answer "yes" to all of these questions?

   Can people be motivated to act on this issue (is it widely and deeply felt)?
   Yes ❑ No ❑

   Is the issue easily understood? Yes ❑ No ❑

   Is the issue non-divisive? Yes ❑ No ❑

   Can you win some improvement on the issue, ideally in a short amount of time? Yes ❑ No ❑

   Will acting on this issue increase the visibility of the union?
   Yes ❑ No ❑

   Will winning result in real improvement in members' lives?
   Yes ❑ No ❑

3. Clearly state the solution you desire for the problem.

4. Who, specifically, can solve the problem? (Who is the "target" of any actions?)

5. Develop a list of possible collective and unifying actions that you think workers will be willing to take to put pressure on the target (see below for some ideas).

6. Prioritize your actions so that if the target doesn't move to solve the problem, you can increase your pressure. Decide which action to take first, second, etc.

7. Determine how you will communicate with the membership about the problem and about the plan of action.

Communication Method	**By Whom**	**Date to Be Done**
One-on-one	_____	_____
Newsletter/flyer	_____	_____
E-mail/text	_____	_____
Meeting	_____	_____
Phone tree	_____	_____
Media contact	_____	_____
Other	_____	_____

Possible Actions:

- Group grievance
- Group meeting with decision-maker
- Button day, T-shirt day, etc.
- Newsletter article
- Distribute leaflets
- Rally/demonstration
- Informational picket
- Political action
- Contact community allies
- Petition
- Media event
- Other _____

Delegating — A Means of Building a Strong, Effective Union

One of the most important skills of an effective local leader is delegating. A union in which many people participate is far stronger than one in which a few people do all the work. Local leaders cannot accomplish everything on their own. And even if they could, they shouldn't. Doing all the work yourself instead of engaging many, is a surefire way of creating a weak union.

Many local union leaders wear two, three or even more different leadership "hats." Can you take off one hat and offer it to someone else, perhaps a new or young leader in the union? Effective local union leaders make it a practice to delegate responsibility and ask for help. A few tips:

- Match talent to task: choose a member who is capable of performing a given task, someone who has knowledge, experience and eagerness to handle the assignment;
- Reach out to members who are not currently active. Delegating a specific task is an opportunity to involve more members and make the union stronger;
- Think about delegation as a way to develop new leaders, especially women, people of color and/or younger members;
- Ask the member in person;
- Explain the objectives of the assignment, including the purpose of the job, the desired results, the role and authority being delegated and any timetables involved;
- Provide the member with the resources and the authority needed to carry out the assignment;
- Keep in contact with the member so you can mentor, monitor progress, establish accountability and enable the member to provide information and feedback;
- Give credit and praise for a job well done.

RESOURCE ALERT! AFSCME Next Wave Toolkit

The Next Wave is coming! AFSCME members in their 20s and 30s are stepping up to the plate and increasing their activism in the union. Locals and councils are organizing Next Wave caucuses, educational programs and social events. Find out more at **afscme.org/union/next-wave.**

Section 5: Local Union Structure and Committees

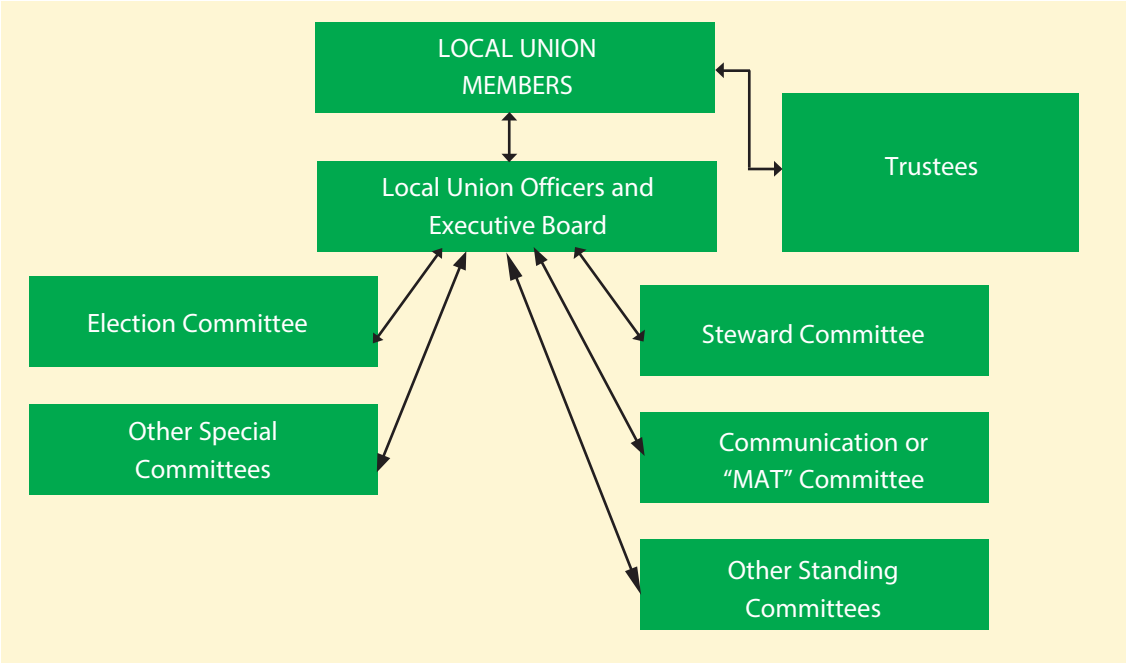
"I long to accomplish a great and noble task, but it is my chief duty to accomplish humble tasks as though they were great and noble. The world is moved along, not only by the mighty shoves of its heroes, but also by the aggregate of the tiny pushes of each honest worker."

— Helen Keller, educator

Having an effective local union committee structure provides three major benefits to the union:

- The work of the local is divided among many participants.
- The individual skills and talents of members are better utilized, and union activism grows.
- New leadership may emerge.

Local Union Structure



Some Basics About Committees

- A committee structure helps divide the work and provides a way for members to participate.
- The number and types of committees will depend on the size and needs of the local.
- The president appoints all committees, subject to the approval of the executive board.
- Committees should regularly report to the membership and to the executive board.
- The constitution prohibits candidates for local union office from being members of the elections committee.

There are two types of committees: standing and special. Standing committees address needs that are ongoing, such as communications, health and safety, and political action. Special committees are created for a specific, short-term purpose and are then dissolved. Examples would be planning an action campaign or a Labor Day picnic or conducting research on child care facilities in the area. The number and types of committees depend on the size and needs of the local.

The president, subject to the approval of the executive board, appoints all committees chairs. (One possible exception to this is the bargaining committee. In many locals, this committee is elected; see your local's constitution).

Active and Effective Committees

For each committee the local establishes:

- Identify a clear purpose for the committee;
- Appoint a chairperson (to facilitate meetings, delegate responsibilities, coordinate the work, etc.) and a recorder (to take notes and keep records);
- Recruit members for the committee that reflect the diversity of the union's membership (shift, work area, age, gender, race/ethnicity, sexual orientation);
- Involve all committee members in the committee's work. Each person should have responsibility for specific tasks with a specific time frame;
- Set a regular date, time and place for committee meetings;
- Hold short and well-organized meetings, preferably at work;
- Maintain regular communications with all committee chairs;

- Require each committee chair to give a report at local membership meetings. Reports can summarize the committee's activities and/or make recommendations on actions the local should take; and
- Give recognition for achievement.

Following are brief descriptions of several common committees that a local, depending on its size and needs, can put into place.

Bargaining

Purpose: Negotiate a collective bargaining agreement and develop and implement a contract campaign that actively involves members in the bargaining process to win the best possible contract for the membership.

One of the union's most important responsibilities is negotiating a contract with management to determine the pay and working conditions for all workers in the bargaining unit over the lifetime of the agreement. Because of the importance of this committee, members are often elected or appointed. The work of the negotiating committee can be divided into three stages.

- Pre-bargaining tasks include:
  - conducting research on bargaining topics (wages, health care, etc.);
  - determining the membership's needs and opinions through meetings, surveys conducted by the Member Action Team, etc.;
  - reviewing the current contract for areas to improve and reviewing the grievance files to determine areas where there have been challenges in enforcing the contract;
  - establishing priorities and preparing contract proposals.
- Bargaining tasks include:
  - exchanging proposals with management and bargaining over those proposals;
  - maintaining records (notes) of what was discussed and intended during contract talks;
  - making decisions on what to accept, and not to accept, in the proposed contract;
  - communicating with members about trends and progress in negotiations;
  - mobilizing members to participate in support actions;
  - reaching a tentative agreement on a new contract.

- Post-bargaining tasks include:
  - planning a meeting to vote on the tentative agreement;
  - making a recommendation to the membership on whether or not to ratify the tentative agreement;
  - signing up new members and PEOPLE contributors at the ratification meeting;
  - informing and educating the membership about the new contract.



RESOURCE ALERT! The Collective Bargaining Tool Kit contains resources such as Developing and Justifying Contract Proposals: A Guide for AFSCME Negotiations, Checklist of Contract Clauses, Sample Bargaining Survey, links to other contracts, statistics for bargaining and much, much more. The kit is available on AFSCME's website, **afscme.org.**

Communications

Purpose: Inform and educate members, potential members and the community about union issues, successes and the union's point of view.

Consistent, effective communication — to inform and educate the members as well as increase union visibility in the workplace and community — is key to building a strong local union. The communications committee can:

- Produce a traditional or electronic newsletter, ideally on a monthly basis. The publication may include:
  - information on topics of concern to members
  - grievance victories and other success stories
  - regular columns such as "know your rights"
  - notices of upcoming meetings and events
- Create and maintain a website and consider using social media such as Facebook;
- Produce leaflets, flyers and fact sheets on "hot" issues and problems affecting the members;
- Establish a connection with the local media to communicate to the public the union's point of view on issues impacting both the general public and union members, specifically;

- Issue news releases to communicate the union's position on relevant topics and publicize the local's major activities.



RESOURCE ALERT! Union Hall is a free tool for AFSCME affiliates and locals to easily create and maintain professional looking websites. It does not require any technical skills — and it's free! Go to **afscme.org/unionhall** for more information.

Community Action

Purpose: Establish a link between the local and the community, build respect for AFSCME members and the services they provide, and increase community understanding of AFSCME's issues.

Activities of a community action committee might include:

- Promoting quality public services, raising awareness of the services that union members provide and securing support for preserving and improving them;
- Involving the local in activities such as blood drives, literacy programs, food banks, drug/alcohol awareness campaigns and natural disaster relief efforts;
- Building coalitions with community groups to provide mutual support on common issues and developing support for the union in contract negotiations, organizing and politics.

Education

Purpose: Increase knowledge, improve skills and build confidence among union leaders, activists and rank-and-file members for the purpose of creating a stronger, more active and more effective union.

"Knowledge is power," and the education committee can help turn this phrase into reality for union activists. A sampling of tasks for this committee would include:

- Determining local members' education wants and needs by using surveys and other instruments;
- Researching, scheduling and arranging training programs on such subjects as stewards, officers, bargaining committees, health and safety, organizing and political action;
- Developing informational material on issues affecting union members;
- Creating an orientation packet for new members;
- Arranging for a video or speaker on a particular topic of interest at the local's membership meeting.

Elections

Purpose: Assume the "responsibility for the conduct of the election in accordance with [the] Constitution" (Appendix D, Section 2, of the International Constitution).

The duties of the election committee include:

- Conducting nominations for an election;
- Providing notice of the election to the membership;
- Preparing election ballots;
- Supervising voting;
- Counting the ballots and certifying results;
- Hearing and deciding any protests filed over the conduct of the election;
- Reporting election results to the membership.

The AFSCME Constitution specifically prohibits candidates for office from being members of the election committee; this restriction helps establish the election committee as an independent body, one that can protect the members' right to democratic elections.



RESOURCE ALERT! AFSCME Local Union Election Manual is available on AFSCME's website: **afscme.org/publications.**

Health and Safety

Purpose: Protect workers' health and safety at the worksite by identifying and recognizing hazards and devising strategies to address any health and safety problems.

Many contracts have language that establishes a joint labor-management health and safety committee. However, even in these instances, and clearly when there is no joint health and safety committee, local unions have found it valuable to have an internal health and safety committee whose responsibilities may include:

- Gathering information on workplace health and safety hazards;
- Educating members and helping stewards write effective grievances concerning health and safety issues;
- Mapping risks and investigating accidents;
- Recommending to management ways to prevent accidents and injuries;

- Maintaining records on hazards, accidents, illnesses and complaints;
- Being familiar with Occupational Safety and Health Administration (OSHA) regulations as well as state or local health and safety regulations;
- When appropriate and necessary, filing formal complaints with OSHA, the Environmental Protection Agency (EPA) or the proper state or local agency.



RESOURCE ALERT! Safe Jobs Now: An AFSCME Guide to Health and Safety in the Workplace. Several publications on specific health and safety topics and more than 40 fact sheets on particular health and safety issues are available on AFSCME's website: **afscme.org/publications.**

Member Action Team (MAT) or Organizing

Purpose: Communicate with and mobilize members about key issues. Recruit new members and build power in the workplace by motivating members to become active in the local.

Question: What is the source of the union's power?

Answer: The membership! And not just the number of members, but also the active involvement of the members.

See page 27 for details on the Member Action Team structure and responsibilities.

PEOPLE

Purpose: Advance the mission of the union through member engagement in political and legislative action.

On a daily basis, elected leaders make decisions that determine the workplace conditions of private sector and public sector workers. In fact, they can decide whether we even have jobs. That's why it is vital that AFSCME members be politically active. Political action allows us to directly elect our bosses and sets the table for the rest of the union's activities since the political climate can make or break our efforts to organize workers, negotiate contracts, settle grievances and communicate at the workplace with one another.

AFSCME supports or opposes candidates based on their positions on issues important to working families and their communities. Actions are decided and implemented by AFSCME union members through our Political

Action PEOPLE Committees. Here are some tasks for a year-round PEOPLE committee:

- Inform and educate members on issues of importance to working families;
- Enroll at least 25 percent of members in the PEOPLE PAC at the MVP level;
- Register at least 90 percent of members to vote;
- Identify, recruit and train 3 percent of members as grassroots political activists;
- Deploy 2 percent of members as Election Day volunteers;
- Identify worker-friendly candidates for public office, communicate with them and help elect them to office;
- Educate elected public officials on issues of importance to workers and their families;
- Hold politicians accountable for their actions through constant interaction, supporting those who support us and opposing those who oppose us.



RESOURCE ALERT! Local Union Lobbying: How to Support It with Coalition Building and Media Relations. Available on AFSCME's website, **afscme.org/publications.**

Steward/Grievance

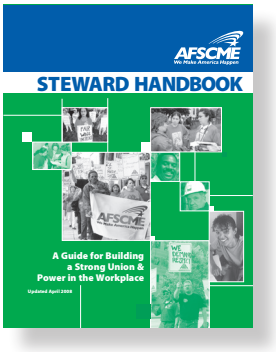
Purpose: Work together to identify opportunities to make improvements in the workplace, develop strategies to enforce workers' rights and build power in the workplace.

The chief steward usually chairs the steward or grievance committee. In some locals, the vice president chairs the committee. Ideally, this committee should meet once a month, and stewards can:

- Discuss current and potential grievances and share ideas on how those cases should be handled;
- Learn what's happening at different worksites in the local and develop strategies to address current challenges and opportunities;
- Increase understanding of the contract, work rules, policies and regulations;

- Celebrate victories and decide how to publicize those victories in the workplace;
- Sharpen skills and build the confidence of new stewards, and provide ongoing education for all stewards.

RESOURCE ALERT! AFSCME Steward Handbook is available online at **afscme.org/publications.**



Women's Committee

Purpose: Energize and develop women activists, champion issues of particular interest to women and support the local union's organizing, political and bargaining initiatives.

A women's committee is a valuable tool for building a strong local union. It encourages union activism among women members and seeks to boost women's leadership skills and confidence through training and participation in union events. The committee focuses on issues that are especially important to women, such as balancing work and family, child care and flexible work schedules. By taking up these issues, the committee educates women members as well as the entire workforce on how support for these issues is beneficial to all bargaining unit members. A women's committee often takes on such tasks as:

- Distributing surveys on women members' needs and interests;
- Researching issues of concern to women members and providing information;
- Engaging in organizing and grassroots legislative and political action;
- Running educational programs, such as AFSCME's Public Speaking training. Contact the AFSCME Education Department at 202-429-1250 for more information.

Section 6: Working as an Effective Leadership Team

"We must learn to live together as brothers or we are going to perish together as fools."

— Dr. Martin Luther King Jr., civil rights leader

What is a team?

A team is two or more people who must coordinate their activities to accomplish a common goal.

Is your local union executive board a team? If it's not, perhaps it should be!

To accomplish its central goal — building a strong, effective union — the executive board must be able to work together in harmony. The executive board oversees the work of the union's committees; plans the agenda for membership meetings; and, as the leadership body, determines the goals and objectives of the local and develops plans and strategies to achieve those goals.

Working as a team is not easy. Sometimes working as an individual is simpler and more productive. But there are significant advantages to working together as a local union leadership team:

Results: For a local to achieve great results — to engage members fully, impact elected officials and secure strong contracts — everyone must pull together. A local can survive with a few individuals carrying the load or working poorly together, but to thrive it must have a real and effective leadership team.

Participation: Member participation matters in everything we do — it increases the union's power and it increases the membership's investment in the union and its goals. The same is true of the local union's leadership: the more the whole leadership team is involved in planning and decision making, the more active and invested it will be in the work of the union.

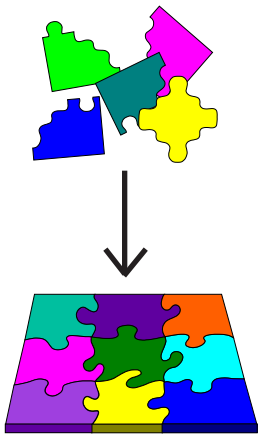
Mentoring: No one can — or should — stay in the same leadership role forever. Working as a team creates opportunities for new leaders to learn so that they can take on more challenging tasks and roles over time.

There are predictable challenges to working effectively as a team, and some good advice exists about how to overcome those challenges.

Team Development: Forming, Storming, Norming and Performing

One theory about teams is that they all go through four stages: forming, storming, norming and performing. Sometimes they go through them in order. Sometimes they bounce around. Teams will spend a different amount of time in each stage, and teams can get stuck in one of the stages. Some teams cycle through all of these stages several times.

Knowing what to expect at each stage of development may help you and your team handle the challenges of each stage.



Forming:

- Team members get to know each other.
- The team learns about opportunities and challenges, agrees on goals and begins to take action.
- Team members are usually on best behavior.
- Existing teams may return to the forming stage if new members join the group or the team tackles a new project.

If your team is forming:

- Help members get to know each other.
- Encourage the team to set clear goals.
- Be clear about roles: your own and others.

Storming:

- Different ideas compete for consideration.
- Team members become more anxious about their ability to succeed.
- Factions may form. Tensions rise.
- Sometimes people "act out" or "check out."
- Some teams resolve storming quickly. Others get stuck here.



To get out of it, the team has to learn to engage in healthy conflict and tolerate differences.

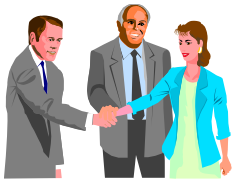
If your team is storming:

- Be open to exploring differences of viewpoint and opinion.
- State your own views without attacking others — critique ideas, not people.

Remember that this stage is necessary for the team to grow and perform!

Norming:

- Team members adjust their behavior to each other.
- Team members begin to believe in the team and trust each other.
- Motivation increases as the team gets more acquainted with what they're doing as a team.



If the team gets stuck in norming, they can begin to "group-think" — agreeing on everything instead of letting individuals disagree and suggest creative new ideas.

If your team is norming:

- Negotiate roles and processes that will help the team succeed in the long run.
- Create space for debate and dissent.
- Get ready to perform!

Performing:

- Team achieves high performance and results.
- Work gets done smoothly and effectively.
- Team members are knowledgeable and motivated.
- People disagree and debate, respectfully.
- The team's goal is to reach and stay at this stage.



If your team is performing:

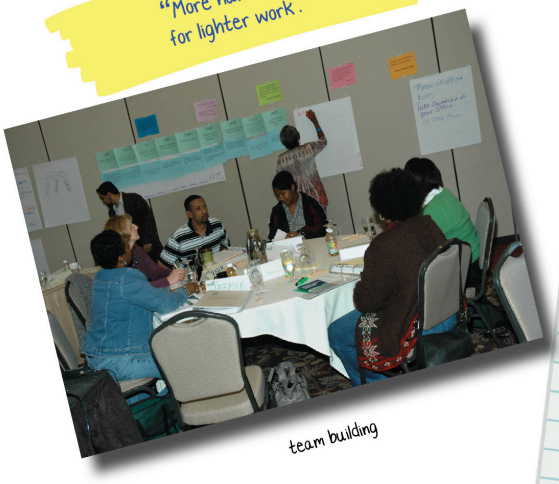
- Increase intensity and set more ambitious goals.
- Debrief activities and campaigns to learn from experience.
- Celebrate progress and victories!

RESOURCE ALERT

The AFSCME Education Department provides training for local union leadership teams through the AFSCME Local Union Leadership Academy. Contact your council or parent local for more information.

AFSCME Local Union Leadership Academy

"More hands make for lighter work."



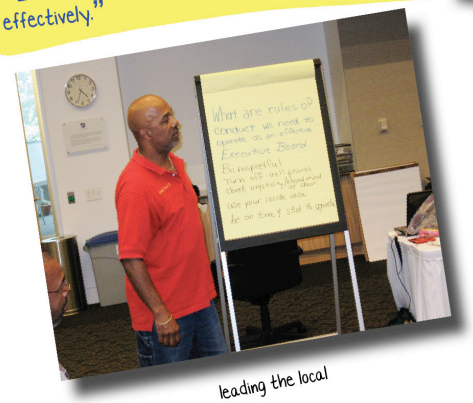
team building

What is the Local Union Leadership Academy (LULA)?

* LULA is a partnership between your affiliate and the International Union (IU) Education Department.
* A team-building experience for the local union leadership team, including new and young leaders.
* A chance to build skills and clarify roles and responsibilities of officers and activists.
* An opportunity for the local to set goals and plan a project to increase member involvement.
* A way to build solidarity between local unions and learn what unites us as union leaders.

"Every member of the Executive Board who attended the training has stepped up their participation in making goals become realities."

"It takes the board collectively to run effectively."



leading the local

"We set up concrete goals, action steps and time frames, so we left with a real plan, not just vague intentions."

"It was very good to work on a plan together in an unrushed setting."



planning a project

Section 7: Making Union Meetings Work

"The trust of the people in the leaders reflects the confidence of the leaders in the people."

— Paolo Freire, author, Pedagogy of the Oppressed

The local membership meeting is the heart of a democratic union. The meeting should be planned to capture the interest of members. The primary purpose of local membership meetings and executive board meetings is to conduct the business of the union. It is here that members determine the activities and programs of the local. A membership meeting should be a place where:

- Local officers inform the membership — and learn from the membership — about what is happening, what might be happening, why it is happening and the impact on members;
- Members discuss issues and problems, make decisions on how to address those issues and set the local's direction and goals;
- Unity and solidarity begin through members getting to know one another.

Think about the last time you attended a meeting. Was it a great one? Or a lousy one? Did it make you want to come back, or did you swear to never return? What *makes* a meeting good or bad? Now take a moment and think about your local's executive board and membership meetings. Are the meetings good ones or not so good? If it's the latter, never fear! Following are tips for planning and running local union meetings that are results-oriented, fun and motivational so that people will want to come back.

A final note on union meetings: No matter how great your meetings are, or how hard you work at turnout, some people will be unwilling or unable to come to union meetings. Don't despair! That's why we use a variety of methods to communicate with members and workers. As union leaders, you can work hard to make meetings great, and also share the content with those who couldn't make it. See Section 4 for more ideas about communication methods.

Ten Tips for Planning Successful Meetings

Carefully plan and organize the meeting ahead of time.

1. Set meeting goals and decide what results or actions you want members to take. Ask yourself: What will we ask members to do after leaving this meeting? How will we use this meeting to increase participation in the union?
2. Develop an agenda that focuses on issues of importance to members.
3. Plan an activity or invite a guest speaker that appeals to members' interests.
4. Line up committee reports, officer reports, staff reports, etc.
5. Select a day of the week, time and location that is most convenient for the majority of members to attend. Consider rotating the time and location to reach more members.
6. Be sure the meeting room is comfortable and accessible. Consider a room set-up that will encourage participation (u-shape or round table).
7. Distribute the meeting notice to all members well in advance. The meeting notice should include the date, time and location; the topics to be addressed; and perhaps a theme for the activity or guest speaker (for example, Pizza and Politics).
8. In addition to written notice — leaflets, newsletters, bulletin boards, e-mail, website, etc. — use a MAT system (see Section 4) to contact members one-on-one. This is the only way to truly boost turnout.
9. Be thoroughly prepared to conduct the meeting smoothly and efficiently so that it starts on time and ends on time. People will be more likely to come back if their time is respected.
10. Consider an opening activity to help build a sense of community before the formal agenda begins (paired conversations on a specific topic, a fun activity, a video clip, etc).



Tips for Running Results-Oriented, Motivational Meetings

1. Start on time.
2. Have an agenda and stick to it.
3. Call the meeting to order with a welcoming tone. Recognize first timers and new members.
4. Keep reports from officers and staff short or ask people to give written reports.
5. Address old business items, but focus the majority of the meeting on new business and action.
6. Encourage lively discussion and debate on action items.
7. Encourage broad participation. Don't let the same person(s) dominate discussions.
8. Insist that all be treated with respect: no personal attacks, interrupting or foul language.
9. Look for opportunities for members to volunteer.
10. Assign new projects to committees and make sure that next steps are clear.
11. Allow time for announcements and for members to bring up issues or ask questions.
12. Thank members for attending the meeting.
13. Adjourn the meeting and end on time.



RESOURCE ALERT! How to Take Part in Local Meetings This AFSCME publication will help new activists participate in local union meetings. It explains how to use Robert's Rules of Order from the perspective of a meeting participant. Consider making copies available at every local union meeting. To order copies, contact the AFSCME General Services Department at 202-429-1234 or email gshelpdesk@afscme.org.

Planning Guide for a Successful Meeting

Use this planning guide to assess the strengths and weaknesses of your current union meetings and to develop an agenda for your next meeting. Be sure to list specific details about your upcoming local union meeting. Be creative and try adding a new feature to your meeting's agenda.

Assess your current meetings, whether executive board or membership. As a leadership team, discuss the following questions:

What are the strengths of our meetings? What do we do well?

_____

_____

_____

What are some weaknesses of our meetings? What could we do better?

_____

_____

_____

As a group, brainstorm some solutions and reach an agreement on some improvements you want to make. Ideas and agreements for improving local meetings:

_____

_____

_____

What are the goals of the meeting? [Examples of meeting goals: plan a six-month contract campaign; identify potential MAT or an action to engage the MAT team in; develop a plan to increase membership or political action; evaluate contract language.]

_____

_____

_____

What are the post-meeting actions we want members to take? [For example: join a union committee; sign-up for a phone bank; circulate petitions.]

_____

_____

_____

What is our "turn-out" plan that will encourage members to attend? What are key points that should be included on the meeting notice?

_____

_____

_____

Now you're ready! Draft an agenda for this meeting.

TURNOUT IS KEY

The old organizing pearl that "turnout is 90 percent of the event" is true. Devote MUCH more time to turnout than any other aspect of meeting planning. All too often, a great deal of time is devoted to the program, and turnout is ignored. Strong turnout will make the meeting or event great by creating momentum and excitement. A poor turnout will have the opposite effect.

Locals can use a variety of ways to do turnout for meetings, such as leaflets, e-mails, and bulletin board notices. But remember: there is NO substitute for one-on-one conversations for moving people to action. The best way to turn out people for meetings is by word of mouth. Utilize your leadership team, stewards and MATs in spreading the word about the meeting and getting commitments from members to attend. Refer to pages 24-28 for more information on how to do this successfully.

A Procedure for Successful Meetings: Robert's Rules of Order

A key element of effective meetings is the orderly conduct of business. For the purpose of conducting business, maintaining order and ensuring fairness to all participants, AFSCME has determined that Robert's Rules of Order will be used to govern the local union meeting. (Please see Appendix C of the International Constitution.) The four cornerstones of Robert's Rules are:

- Only one subject comes before the meeting at a time;
- Each topic is freely debated with meaningful, informed discussion;
- Every member has the right to be heard; every member has rights and responsibilities equal to those of every other member;
- In making decisions, the majority rules — always.

Basic Elements of Robert's Rules

- A motion, calling for the local to take some course of action, is made; sometimes the chairperson may call for a motion ("Do I hear a motion to …?").
- The chairperson asks for a second. For a motion to be discussed, it must be seconded.
- The chairperson states the motion and calls for discussion ("It has been moved and seconded that …. Is there any discussion?").
- When recognized by the chairperson, meeting participants may speak to (discuss) the motion on the floor.
- On occasion, during discussion, an amendment to a motion may be offered from the floor; this, too, requires a second before the chairperson calls for discussion. ("An amendment has been made and seconded that …. Is there any discussion on the amendment?").
- When discussion has run its course or has been ended by vote of meeting participants, the chairperson conducts a vote ("All those in favor say 'aye.' All those opposed say 'no.'").
- If there is an amendment being discussed, the amendment is voted on first, then the motion as amended if the amendment carries.

- Sometimes a member may raise a procedural "point":
  - on a point of order (example: "The discussion has gotten off the topic of the motion on the floor"), the chairperson makes a ruling ("Your point is well taken, and I remind members to speak to the issue on the floor.")
  - on a point of information or point of clarification, the chairperson can offer clarifying information before discussion continues ("What this would mean is ….")

For more details on conducting meetings, refer to Appendix F: How to Chair a Meeting. Locals can order copies of How to Chair a Meeting and How to Participate in a Union Meeting by contacting AFSCME General Services Department, 202-429-1234.

Collaborative Decision Making Using Robert's Rules of Order

Some locals find Robert's Rules a bit unwieldy or difficult to use. Use of parliamentary procedure may shut down discussion or alienate participants who don't understand the format. At the same time, locals want to maintain the order and democratic decision-making, and that is what Robert's Rules are famous for. You may want to consider the model below, which includes informal discussion along with Robert's Rules to run a participatory and democratic meeting.



Idea

- Start with an idea, issue or question.
- What is the decision that needs to be made?
- Discuss the goal that you are seeking to achieve through your decision.



Discussion

- Generate and evaluate options. Focus on interests, not positions.
- Address people's concerns by looking at underlying needs.
- On important issues, invite everyone to speak.



Motion

- Once the question has been explored, the chairperson can call for a motion or it can come from the group.
- Someone seconds the motion.
- Chairperson asks for discussion on the motion, which could include amendments.



Vote

- Someone calls the question.
- The motion is restated as amended. The chairperson asks for all in favor, against and abstaining to vote and then announces if the motion has been adopted.

Section 8: Structure of AFSCME

"The most common way people give up their power is by thinking they don't have any."

— Alice Walker, author and activist

AFSCME by the Numbers

- **1.6 million active and retiree members**
- **More than 3,400 local unions and affiliates**
- **More than 100 independent employee associations have affiliated with AFSCME**
- **AFSCME members come from 46 states, the District of Columbia and Puerto Rico**

Questions and Answers About AFSCME

What is AFSCME?

The American Federation of State, County and Municipal Employees (AFSCME), AFL-CIO, is the nation's largest and fastest growing public service employees union, with 1.6 million members. By joining together, AFSCME members have clout in the workplace, at the ballot box, in the halls of government and at the bargaining table. AFSCME is a powerful advocate for fairness in the workplace, excellence in public service and prosperity and opportunity for all working families.

Who is in AFSCME?

AFSCME members provide the vital services that make America happen. We're the ones who maintain our roads and airports, care for the sick and elderly, make our schools and universities good places to learn, keep our communities safe and much more. AFSCME members make sure the water we drink is pure, the trash is taken away, the streets are clean, the environment is protected and our communities get vital public services. In so many ways, in so many places, each and every member does the important work of our cities and towns, counties and states, schools and libraries, corrections, health and public facilities. AFSCME members work in hundreds of different occupations — from nurses to corrections officers, child care providers to sanitation workers.

What is a "local"?

As an AFSCME member, you become part of a local union (also called a local) consisting of the co-workers in your office, institution, department or community. Each local writes its own constitution or bylaws, holds regular membership meetings and elects its own officers and stewards.

What is a "council"?

AFSCME local unions within one state, city or county often pool their resources to form a more powerful voice on issues affecting members, called a council. Councils negotiate contracts, handle grievances, arbitrate, educate, provide public relations and work on legislative and political action.

What are "affiliates"?

Independent employee unions or associations choose to affiliate with AFSCME to join their strength with that of AFSCME's locals and councils. The more than 100 affiliates include AFSCME Corrections United, United Nurses of America, AFSCME Retirees and Child Care Providers Together.

Affiliates and councils provide a number of services for members, including representation in grievances in the higher steps of the process and at arbitration hearings, staff assistance with contract negotiations, lobbying of state and local political officials, research, education for members and leaders, and organizing assistance for new members and new bargaining units.

What is the AFSCME International Union?

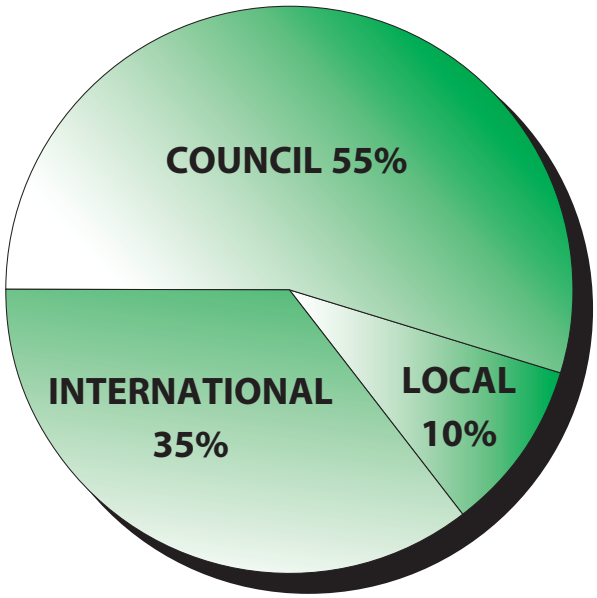
The AFSCME International Union, headquartered in Washington, DC, coordinates the union's actions on major national issues such as privatization, health care, Social Security, fair taxes and worker safety. The International carries out certain national functions such as representing us in the U.S. Congress, coordinating political activities for federal elections and communicating the union's message across the country. It also provides members-only benefits, valuable resources and expert help to councils and local unions to build power in the workplace, at the negotiating table and in our communities. Assistance to locals, councils and affiliates is offered in a number of areas, including:

- Collective bargaining and negotiations
- Communications
- Information systems

- Leadership education
- Legal counsel
- Legislative lobbying
- Organizing
- Political action
- Public relations
- Research
- Training
- Women's leadership development

Where does a union member's dues money go?

Union members' dues go to the local, to the council or affiliate and to the International Union. Locals retain a portion of the dues to cover operating needs as determined by the membership and the executive board. Operating needs, for example, may include newsletters, postage, posters for rallies and other costs related to representing members and enabling them to participate. Councils and affiliates receive the largest portion of the dues to provide assistance to locals and members in areas such as contract negotiations, arbitration, lobbying at the state and local levels, research and organizing. The International Union also receives a portion of the dues in order to coordinate actions and to provide expert assistance to locals, councils, affiliates and their members (and potential members) on a national level.



Who runs AFSCME?

AFSCME members run the union. Every member has a vote in the election of local union officers and board members responsible for conducting the union's business. Members decide on policies, activities and dues. Each local union has its own constitution and governing documents, as do councils, affiliates and the International Union.

Every two years, AFSCME holds its International Convention. AFSCME members are elected as delegates, and debate and vote on the union's basic policies. Every four years, delegates elect the International Union's president, secretary-treasurer and 33 International vice presidents.

Lee Saunders is the President of AFSCME. He was elected in 2012. Saunders joined the Ohio Civil Service Employees Association when he worked for the state and has worked for the union's members in a variety of leadership roles for over 25 years. He is now widely recognized as one of the most effective labor leaders in the country and chairs the AFL-CIO's Political Education Committee.

Laura Reyes was elected secretary-treasurer in 2012. A home care provider, Reyes was instrumental in tripling the size of her union in California to over 60,000 members and is a key advocate for non-traditional workers across the country.

In March 2017, Elissa McBride was elected secretary-treasurer of AFSCME by the International Executive Board. McBride joined the labor movement as a member of United Auto Workers District 65 in 1989. She later worked as an organizer, helping factory workers form unions and win first contracts. McBride joined AFSCME as the director of the Education and Leadership Training Department in 2001.

What is the AFSCME Leadership Academy?

The AFSCME Leadership Academy offers online and in-person training to activists, leaders and staff to develop the knowledge and skills needed to effectively organize workers, represent members and strengthen our political power.

What is the AFL-CIO?

The American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) is the voluntary federation of 57 national and international labor unions, representing more than 11.5 million working women and men of every race and ethnicity and from every walk of life. The mission of the AFL-CIO is to improve the lives of working families by bringing economic justice to the workplace and social justice to our nation. Local unions should affiliate and become active with the AFL-CIO Central Labor Council in their area. Learn more at **aflcio.org.**

What is the difference between AFSCME and the AFL-CIO?

AFSCME is one of the individual unions affiliated with the AFL-CIO.

Section 9: International Union Resources

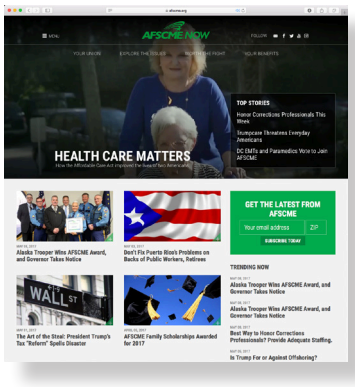
"For the union makes us strong!"

— from the chorus of Solidarity Forever

The AFSCME International Union, headquartered in Washington, DC, provides resources and expert help to AFSCME councils, locals and affiliates. Within the International, the work of departments is linked by one common purpose: to help AFSCME, at every level, become a stronger and more effective union. Below is an overview of the International Union's departments and a sampling of the resources provided by each. To contact any department or staff members of the International Union, please call 202-429-1000.

Communications

The Communications Department manages all external and internal communications for the International Union. Its goals are to help workers gain political power; grow the union through organizing; increase the communications capacity of affiliates and the International Union; promote the value of vital public services and the people who provide them; and project AFSCME's image as a leading advocate for a better America. Department activities include:



- Coordinating media, speechwriting and related communications for national legislative and political campaigns as well as major conferences and events;
- Providing comprehensive strategic communication services and campaign planning for organizing, first contract and other priority campaigns;
- Developing targeted messages; producing direct mail pieces, leaflets, media events and videos; training staff and member activists to be communicators; and managing phone, e-mail and other contact programs;
- Managing the International Union's website, blog and comprehensive e-mail and mobile communications and mobilization program, including our e-activist network and one of the largest social networking communities in the labor movement;
- Strengthening the online capacity of AFSCME's councils and locals by providing e-mail and web tools.



- Producing a wide variety of materials for the International Union, and affiliates, including printed materials and videos.
- Publishing *AFSCME WORKS* magazine for AFSCME's 1.6 million members and retirees, along with *AFSCME en Movimiento*, a Spanish-language companion and online reports offering up-to-the minute news coverage of AFSCME activities across the country. The department also produces several specialized publications such as the *ACU News* for corrections officers.

Data & Analytics

The Data & Analytics Department is a team of data, campaign, field, programming, and member services experts whose goal is to improve the reach and efficiency of communication with AFSCME members and the general public to advance our union's priorities. Its four pillars are improving data at the source; adding value to the data we currently have; developing and promoting best practices for campaigns; and giving anyone running a campaign in the union the tools to ensure accountability and effectiveness.

Education and Leadership Training

The Education and Leadership Training Department provides education in support of the union's mission for AFSCME members, activists, leaders and staff. Our programs are built on a simple premise: Member involvement in union activities builds power in the workplace. The AFSCME Leadership Academy was created in 2006 and is housed in the Education Department. The Leadership Academy provides skills and knowledge to union leaders of all levels and experience, and features free online classes for union activists, leaders and staff.

Some of the department's other major programs include:

- Stewards in Action — a two-day program for stewards that covers the technical skills of grievance handling as well as activating members to solve workplace issues;
- Local Union Leadership Academy — a training for the leadership teams of local unions, focusing on goal setting, team building and action planning;
- Faces and Voices — a two day media training to help members develop and deliver powerful messages that move others to support workers' rights and public services;
- Volunteer Member Organizing (VMO) — focuses on organizing skills for members who are willing to volunteer their time to organize workers outside their own workplace or bargaining unit;



- Member Action Team (MAT) — a program to help locals create a system for ongoing one-on-one communication with all members for the dual purposes of informing members and organizing around workplace issues;
- AFSCME Educator Program — a week-long, train-the-trainer program to equip staff and members with the skills to teach the Stewards in Action and other core programs;
- Women's Leadership Development — resources for AFSCME women leaders, including online modules, and public speaking training;
- Next Wave — the Next Wave creates pathways for new and young activists to become union leaders. Check out the Next Wave Toolkit at **afscme.org**;
- Strategic Planning — department staff provide assistance to councils and locals who want to create and implement long-term strategic plans.

The union also administers several scholarships for AFSCME members and their children. For more information go to **afscme.org/members/scholarships.**

Federal Government Affairs

The primary function of the Federal Government Affairs Department is to serve as AFSCME's lobbying arm to advocate at the federal level on those issues related to AFSCME members' jobs, their families and their communities. In order to carry out this mission, the Department staff routinely represents AFSCME's interests on Capitol Hill and at the White House by meeting with members of Congress, their staffs and committee representatives to advance AFSCME's legislative agenda. The AFSCME Federal Government Affairs staff is responsible for briefing members of Congress and their staffs on how federal legislation will affect AFSCME membership and their families; preparing and presenting testimony for congressional committees; and coordinating AFSCME's grassroots lobbying activities on federal issues across the country.

Virtually every domestic issue affects AFSCME's membership with the result being that the Union's legislative priorities cover more than a hundred issues, ranging from federal spending and tax matters, to health care, to occupational safety and health, and employee benefits. The Federal Government Affairs Department provides AFSCME leaders and members with up-to-date information on the status of federal legislative and executive actions and involves them in advocacy on AFSCME's issues. Through use of the weekly Federal Legislative Report, the Federal Government Affairs Department webpage, legislative alerts and fact sheets, toll-free legislative hotlines, annual voter guides, e-mail activist alerts, and digital media tactics, the Department maintains regular communication with our leaders and activists on critical federal issues.

Financial Services

The auditing section of the Financial Services Department:

- Conducts secretary-treasurer training for affiliates;
- Reviews the financial condition and internal controls of AFSCME's councils and large locals as mandated by AFSCME's Affiliate Audit and Review Program;
- Advises affiliates on compliance with the Internal Revenue Service and the Department of Labor, as well other filing requirements unique to labor unions;
- Provides guidance to affiliates on financial procedures and compliance with AFSCME's Financial Standards Code;
- Administers AFSCME affiliates Surety Bonding program, and;
- Compiles documentation on bonding claims for submission to insurer.

General Counsel's Office

The General Counsel's office provides legal advice to the International Officers, the International Executive Board, the Judicial Panel and Headquarters Departments on a wide variety of legal issues ranging from traditional labor and employment law questions to constitutional issues affecting AFSCME. The General Counsel initiates and defends litigation before federal and state courts and administrative agencies to safeguard the interests of the Union. The General Counsel manages all aspects of offensive and defensive litigation and, when outside attorneys are retained, the General Counsel acts as a liaison between outside counsel and the International Union.

The General Counsel also represents AFSCME in resolving jurisdictional and organizing conflicts that arise under inter-union dispute resolution procedures established in the AFL-CIO Constitution and in "no-raid" agreements with the Change to Win (CTW) unions.

The General Counsel communicates with, and serves as a resource for, several hundred attorneys who represent AFSCME councils and local unions, nationwide.

General Services

General Services provides AFSCME affiliates with various supplies, including forms, publications, membership jewelry and T-shirts. There is no charge for materials that are essential to the performance of the affiliate. Other supplies, such as some publications, stationery, buttons, etc., are offered at minimal cost.

To order supplies, locals must send a completed Requisition Form F-2 and a check for the total amount to AFSCME, 1625 L Street, NW, Washington, DC 20036-5687. Call 202-429-1234 for more information about the F-2 program.

Information Technology Department

The Information Technology Department is responsible for all the computer, technological, network, and software requirements for the union at headquarters and in the field. This includes all computer support, related hardware and peripherals, network equipment, Internet access, routers, and more, as well as any assistance with any other vendor-developed products.



Judicial Panel

The Judicial Panel is an 11-member body appointed by the International President, with the consent of the International Executive Board. The panel is responsible for handling disputes between members involving AFSCME's constitution in a manner consistent with trade union principles and without resort to courts.

The panel's general duties fall into these primary categories:

- Hear charges and appeals filed by union members;
- Determine candidate eligibility challenges;

- Rule on election protests;
- Conduct administratorship hearings and investigations;
- Review rebate appeals and surety bond proceedings.

The majority of cases involve charges by union members and election protests. The Judicial Panel hears cases as original cases or on appeal. Decisions by a Judicial Panel member can be appealed to the Full Judicial Panel and finally, to the International convention.

Organizing and Field Services

Organizing public service workers into AFSCME is a lifeblood priority for our union. To the extent we're able to bring more workers under the AFSCME banner, the better we're able to uphold the wage and benefit standards we've achieved over the years. The main objectives of the Organizing and Field Services Department include:

- Organizing new groups of workers where the union is not yet established. Our Power to Win plan set an annual goal for the International Union to organize new units that total 2 percent of our national membership. International Union organizers are primarily responsible for very large campaigns and for campaigns made possible by the achievement of new collective bargaining rights;



- Assisting AFSCME councils in building their own organizing capacity. The Power to Win plan calls on each council and directly-affiliated local to annually organize new units that total 3 percent of their membership. This means forming an Organizing Department, hiring full-time organizers and devoting the resources to win. Councils and locals run small- to medium-sized campaigns in their jurisdiction, adding bargaining clout for their existing members. The International Union assists in targeting research and organizer recruitment;
- Acting as the liaison in the field for problem-solving efforts of all kinds. International Union staff around the country work directly with councils to assist and augment their efforts.

Political Action

The Political Action Department educates and mobilizes grassroots activists across the country, increases member participation in the PEOPLE (Public Employees Organized to Promote Legislative Equality) program, motivates members to become active on political issues on behalf of political candidates who support AFSCME members and working family issues, and assists our affiliates in efforts to sustain and improve their capacity to engage in coordinated legislative and political activities. Specifically, the Department:

- Coordinates get-out-the-vote (GOTV) campaigns;
- Works with affiliates to research and endorse candidates for public office;
- Builds coalitions and alliances with political and grassroots organizations to further our electoral and legislative goals;
- Directs independent expenditure campaigns in support of endorsed candidates and campaigns;
- Develops and implements grassroots legislative campaigns to combat anti-worker legislation and initiatives at the state and local level;
- Assists in voter registration drives;
- Where permitted by law, works with affiliates to provide support to individual candidates and raise awareness about ballot initiatives and referenda;
- Provides training on political campaigns;
- Utilizes AFSCME's coast-to-coast Polling Center network to conduct voter mobilization projects, polling and survey research.



At an affiliate level, the council and local union-based PEOPLE PAC committee is the union's vehicle for our direct and powerful impact on legislative and political processes. Since, by law, union dues cannot be used to fund political campaigns for federal and many state offices, voluntary member contributions to the PEOPLE fund are used to help elect pro-worker candidates.

The Political Action Department is home to AFSCME PEOPLE, our political action committee (PAC). PEOPLE solicits voluntary contributions to the (PAC) with a goal of recruiting at least 10 percent of AFSCME members to contribute at the MVP level, which amounts to an annual donation of $100—just $2 a week! MVP participants earn incentive points for each dollar they contribute, which can be redeemed for merchandise through the online Rewards program. AFSCME members can contribute to PEOPLE by signing a payroll deduction card where there is PEOPLE check-off; signing up through electronic funds transfers (EFT) or credit card payments where there is no check-off; organizing PEOPLE fundraising events and becoming active in a council or local union's PEOPLE/political action committee.

Research and Collective Bargaining

The Department of Research and Collective Bargaining Services provides assistance to AFSCME locals and their members in many different areas, including:

- Contract negotiations — by assisting local negotiating committees, analyzing budgets and benefit plans, making wage comparisons

and providing sample contract language (using more than 10,000 AFSCME contracts that are kept on file);

- Safety and health — by providing information on health and safety hazards, and offering workshops and technical assistance on a wide range of subjects;
- Contracting out/privatization — by providing information on the pitfalls of contracting out/privatization and on the companies involved and by providing on-site assistance to affiliates;
- Health and pension benefits — by providing technical help in efforts to preserve benefits or contain costs and by helping elect member trustees to pension boards and supporting their work;
- State legislation and policy — by working with affiliates in shaping state budgets and reform efforts in health care and pensions, social services, education, corrections and other areas relevant to AFSCME members; and in shaping or protecting collective bargaining and civil service laws; and understanding the implications of various labor and employment laws;
- Administering AFSCME Advantage, a members-only benefits program that helps members and their families save money with a low-interest credit card, life insurance, legal services, home mortgages, vacation packages and other benefits.

Retirees

The AFSCME Retirees is an expanding national network of retired public-sector workers with members in 260 state and local groups. AFSCME retiree chapters serve to:

- Unite and mobilize retirees around common goals, particularly the protection and improvement of their public-sector pensions and health benefits;
- Monitor federal legislation and national issues of concern to retirees such as Social Security and Medicare;
- Develop political activities for retired members.



Section 10: An AFSCME History Timeline

"Those who profess to favor freedom and yet depreciate agitation, are people who want crops without ploughing the ground; they want rain without thunder and lightning; they want the ocean without the roar of its many waters. The struggle may be a moral one, or it may be a physical one, or it may be both. But it must be a struggle. Power concedes nothing without a demand; it never has and it never will."

— Frederick Douglass, American abolitionist

AFSCME is Created in Madison, Wis.

1932 A small group of white-collar, professional employees in Madison, Wis., fearing they would lose their civil service jobs to political patronage, form the Wisconsin State Employees Association (WSEA), which would later become Council 24 (Wisconsin State Employees Union)

1933 WSEA members hold meetings, march, demonstrate and lobby hard in the state Legislature to defeat a bill that would have dismantled the state civil service system

1935 Other employee associations and unions emerge in 19 states; at the American Federation of Labor (AFL) convention, the group, now known as the American Federation of State, County and Municipal Employees (AFSCME), is made a "department" of the American Federation of Government Employees (AFGE)

1936 AFSCME is granted a charter by the AFL; Arnold Zander is elected as AFSCME's first International president

1938 2,000 sanitation workers in Philadelphia go on strike to protest layoffs and pay cuts and win AFSCME's first bargaining agreement with a major city

1936-1945 AFSCME focuses on lobbying in state legislatures to pass or strengthen civil service laws; membership increases from 10,000 to 73,000



1945-1946 World War II ends; the postwar period is marked by a wave of strikes as workers — 3.5 million in 1945 and 4.6 million in 1946 — strike for higher wages in the postwar economy; there is also unrest in the public sector as city employees strike in several cities

1947 Eight states pass laws that would penalize striking public workers; Congress passes the Taft-Hartley Act, which restricts private-sector unions and makes it easier for employers to break strikes and harder for workers to win union recognition

Growth and Expansion



1955 AFL and CIO (Congress of Industrial Organizations) merge to form the AFL-CIO; AFSCME absorbs the Government and Civic Employees Organizing Committee; AFSCME membership passes 100,000

1958 A series of strikes and demonstrations in New York City pressures Mayor Robert Wagner to sign an executive order granting collective bargaining rights to unions representing city employees; under leadership of District Council 37 Pres. Jerry Wurf, AFSCME begins winning elections that make it the strongest public worker union in the city

1961 Pres. John Kennedy issues Executive Order 10988, legitimizing collective bargaining for federal employees and creating a favorable atmosphere for all public employees

1964 Jerry Wurf — running on a platform of aggressive organizing, fighting for collective bargaining rights for public workers, and union reform/union democracy — is elected the second International president at the biennial AFSCME Convention in Denver, Colo.

1965 A special AFSCME Convention rewrites AFSCME's Constitution and includes a Bill of Rights for union members, a first in the American labor movement

By year's end, Wisconsin and Connecticut enact collective bargaining laws for public employees; AFSCME membership reaches 250,000



AFSCME and the Civil Rights Movement

Mid-1960s AFSCME's demands for respect for public workers become linked with the civil rights movement and progressive groups that protest economic, racial and social injustice

1967 Missouri and New York enact collective bargaining laws for public employees

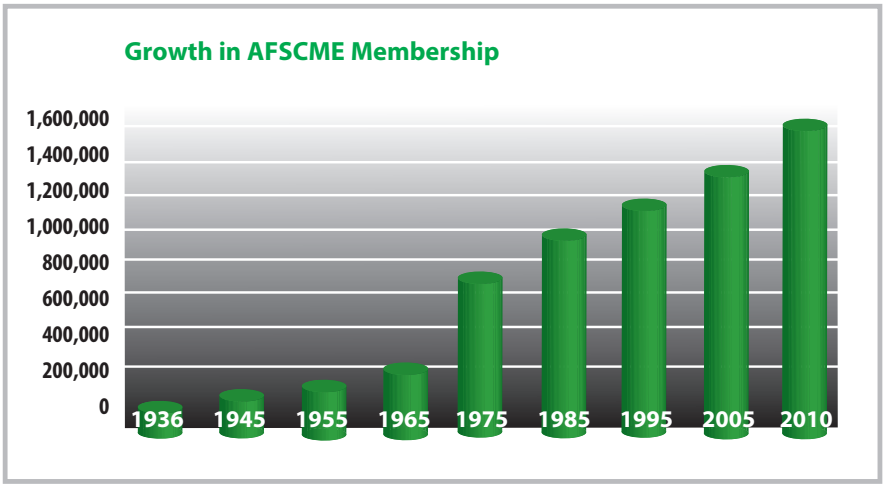
1968 Sanitation workers in Memphis, Tenn., strike for union recognition and against the city's discriminatory practices; Dr. Martin Luther King Jr. marches with the striking workers and is assassinated; the city agrees to recognize the workers' union, AFSCME Local 1733

1969 Maine, Nevada and Vermont enact collective bargaining laws for public employees

1970 Delaware, Hawaii and Pennsylvania enact collective bargaining laws for public employees

1971 Minnesota and Kansas enact collective bargaining laws for public employees

1972 William Lucy is elected secretary-treasurer of the International union; a lifelong civil rights activist, Lucy worked closely with Dr. Martin Luther King, Jr. in Memphis, Tenn., co-founded the Free South Africa Movement



Power Through Organizing

1975 In Pennsylvania, some 46,000 AFSCME-represented state workers strike for fair wages — the first legal, large-scale strike by public employees

Young organizer Gerald W. McEntee leads drive to unionize more than 75,000 public service workers in Pennsylvania – the largest organizing campaign in the United States at that time

Mid-1970s More than 60 independent employee associations affiliate with AFSCME

1978 The New York Civil Service Employees Association (CSEA), with 250,000 members, affiliates with AFSCME and pushes membership over the 1 million mark

1980s In an era of anti-public worker sentiment, AFSCME greatly increases its political activism and visibility and helps elect AFSCME-endorsed candidates at all government levels; collective bargaining rights are won in three new states: Illinois, Ohio and Nebraska

1981 Pres. Ronald Reagan breaks a strike by PATCO (Professional Air Traffic Controllers Organization), beginning an era of attacks on workers in both the public and private sectors

AFSCME's 60,000-member delegation, the largest from any single union, leads the AFL-CIO Solidarity Day — a massive demonstration in Washington, DC, demanding fair treatment for American workers

City workers in San Jose, Calif., members of AFSCME Local 101, wage the first strike in the nation's history over the issue of pay equity for women workers

AFSCME Pres. Jerry Wurf dies

Gerald McEntee is elected as the union's third International president. He began his AFSCME career in 1956 as a member and continued as an organizer and leader in Pennsylvania.

1989 The National Union of Hospital and Health Care Employees (NUHHCE) affiliates with AFSCME

1990 AFSCME membership surpasses 1.2 million

AFSCME-United Nurses of America is founded to bring together nurses within AFSCME

1993 AFSCME Corrections United (ACU) is founded to unite corrections officers within AFSCME

1998 Delegates at AFSCME's Convention commit to a bold program of aggressive organizing, building upon AFSCME's renowned organizing model

AFSCME in the 21st Century

2001 60,000 public service workers in a dozen states and Puerto Rico organize with AFSCME — the largest single year of organizing in three decades

2002 Another 55,000 workers join AFSCME; membership reaches 1.3 million

2004 AFSCME Convention delegates pass the 21st Century Resolution, creating a committee to examine every aspect of the union and to make recommendations to the 2006 AFSCME Convention



2006 AFSCME increases its ranks to 1.6 million members

The 21st Century Power to Win plan is adopted at 37th AFSCME International Convention, and delegates participate in a town hall meeting to discuss implementation of the plan

Leading grassroots efforts across the country, AFSCME helps stop the Bush administration from privatizing Social Security

Through concerted efforts, the union helps win six governors' houses and take back legislative chambers in 10 states, as well as take back the U.S. House of Representatives and the U.S. Congress

2008 40,000 volunteers mobilize to elect Pres. Barack Obama and Vice Pres. Joe Biden

2009 AFSCME is the top organizing union in the AFL-CIO

AFSCME plays a major role in getting fiscal relief for states through the American Reinvestment and Recovery Act (ARRA)

AFSCME convenes the first ever national Next Wave Conference, for new and young leaders of local unions and councils. Nearly 600 Next Wavers converge on Chicago, Ill.

A Main Street Movement

2010 AFSCME mounts the largest issue mobilization campaign in union history to win passage of Pres. Barack Obama's health care reform legislation

Lee Saunders is elected secretary-treasurer of the International union, upon the retirement of William Lucy. Saunders joined the Ohio Civil Service Employees Association (OCSEA) when he worked for the state of Ohio in his 20s. Saunders worked for AFSCME in many capacities beginning in 1978

2011 In February, nearly 200,000 Wisconsin public service employees, including more than 60,000 AFSCME members, lose the right to bargain collectively over health care, retirement and working conditions. In response, tens of thousands of protestors demonstrate at the Capitol in Madison for months. A recall campaign is mounted that ultimately resulted in two Republican state senators being unseated from office

In Ohio, Senate Bill 5 (SB 5) targets collective bargaining for public workers. AFSCME members, working with other unions and coalition partners, gather enough signatures to place a repeal referendum on Ohio's November 2011 ballot. Ohioans overwhelmingly vote to repeal SB 5 and to protect collective bargaining for public employees

2012 Lee Saunders is elected president of the International union, upon the retirement of Gerald McEntee

Laura Reyes is elected secretary-treasurer of the International union; a home care provider, Reyes was president of United Domestic Workers, AFSCME Local 3930, which represented 62,000 home care providers in her home state of California

2014 AFSCME launched the 50,000 Stronger organizing campaign. The union nearly doubled that goal, signing up 92,155 new members

2015 The union launched AFSCME Strong in March 2015, a campaign focused on communicating and organizing, member to member. AFSCME Strong leverages the strength of member activists, training them to connect with their co-workers through one-on-one conversations on issues critical to working families — wages, job security, safe staffing levels, retirement security, and asking them to recommit to our union. Through AFSCME Strong, we increase our power in the workplace, and at the bargaining table. Through AFSCME Strong, activists have signed up 287,000 new members.

2016 We developed a powerful new story of AFSCME and launched a communications campaign that echoed the final sentence of that story: "We never quit." The campaign promotes AFSCME members' remarkable dedication to public service and pride in their work. The campaign supports union-building efforts by demonstrating how AFSCME strengthens members' individual and collective power, workplace opportunity, family well-being, and community support.

Also in 2016, more than 6,600 public service workers in Northern California voted to affiliate with AFSCME. They are members of Public Employees Union (PEU), Local 1.

2017 In March 2017, Elissa McBride was elected secretary-treasurer of AFSCME by the International Executive Board

Appendix A

Sample Local Monthly Financial Report

Note: This is a minimal report that meets the requirements of the Constitution. Locals that have the capacity are encouraged to prepare more detailed financial reports. See examples on pages 48-50 of the AFSCME Financial Standards Code.

AFSCME LOCAL _____
MONTHLY FINANCIAL REPORT

Statement of Receipts and Disbursements
For the Month Ending December 31, YYYY

Receipts		
Dues Rebate	$ 1,500	
Interest Income	50	
Other Income - Fundraiser	550	
Total Receipts		$ 2,100
Disbursements		
Rent	$ 400	
Utilities	150	
Mileage	200	
Postage/Newsletter	350	
Total Disbursements		1,100
Excess (Deficit) Receipts Over (Under) Disbursements		1,000
Add: Checking Account Balance at December 1, YYYY		15,000
Checking Account Balance at December 31, YYYY		$ 16,000

Statement of Cash Assets
As of December 31, YYYY

Unionville National Bank Account No. _____	$ 16,000
Money Market Fund	10,000
Total Cash Assets	$ 26,000

Schedule of Unpaid Obligations
As of December 31, YYYY

Name/Vendor	Date of Invoice	Amount
Lawyers, Inc.	December 28, YYYY	$ 3,000
Accountants, Inc.	December 29, YYYY	1,000
Total Unpaid Obligations		$ 4,000

Appendix B

Sample Local Meeting Minutes

Minutes of the meeting of April 12, YYYY.

President Linda Jansen called the meeting of Local 1234 to order at 6 p.m.

1. Roll call of officers was taken by Recording Secretary Lou Westover. All officers were present.

2. The minutes of the previous meeting were distributed, read, amended as necessary and approved.

3. The president asked the recording secretary to read the local's correspondence. Letters were read from the committee on political education asking for participation in the voter registration drive and from the council president concerning the upcoming Education Conference.

4. Reports of the Officers:

    A. The president reported on the executive board meeting held on April 5, YYYY. It was moved by Jack Ely, seconded and carried that the report be accepted.

    B. Secretary-Treasurer Rudy Martinez distributed and reviewed the monthly financial report for March (a copy is attached). After questions and discussion, it was moved by Arlene Smith, seconded and carried that the report be accepted.

5. Committee Reports:

    A. Organizing Committee. Chairperson Leroy Gordon reported that 22 new members had been signed up in March.

    B. Steward Committee. Vice President Mary Weiss reported that a group grievance was being filed over the recent change in the dress code.

C. Women's Rights Committee. Chairperson Veronica Bennett reported that the committee was conducting a survey to gather information on the concerns of women members.

D. Education Committee. Chairperson Richard Marsh recommended that the local send two members to the public speaking training offered by the council. The matter was referred to new business.

6. Unfinished Business:

The issue of free parking spaces for county employees was discussed. Tony Valentino moved that stewards and the MAT circulate a petition to members that would be presented to the county executive. The motion was seconded and carried.

7. New Business:

Brenda Reid moved that the recommendation of the education committee be accepted, that the local send the committee's chairperson and the vice-president to attend the program, and that the local pay the participants' mileage and per diem at federal government approved rates. The motion was seconded and carried.

8. Good and Welfare:

Education Committee member Mary Williams recapped the key points made by guest speaker Rev. James Robinson of the Community Coalition regarding the upcoming demonstration against privatization. Leonard Lee informed those present that Shirley Goodman was still confined to County General Hospital after her surgery, but could now receive visitors.

9. It was moved, seconded and carried that the meeting be adjourned.

The meeting was adjourned at 7:20 p.m.; minutes were submitted by Lou Westover, recording secretary.

Appendix C

A Glossary of Labor Terms

Agency Shop: A union security contract clause requiring employees covered by the contract, but who decline to join the union, to pay a service fee to the union equal to, or a percentage of, the union dues. The intent of this fee (sometimes called "fair share") is to compensate the union, which, by law, must give full and equal representation to all bargaining unit members, regardless of membership status (see "Duty of Fair Representation" below).

AFL-CIO: The American Federation of Labor-Congress of Industrial Organizations (AFL-CIO), a federation of more than 50 labor unions in the United States, representing more than 9 million American workers.

Arbitration: See "Grievance Arbitration" and "Interest Arbitration."

Bargaining Unit: A group of employees in a given workplace that has sufficient commonality of interest to constitute a unit for purposes of collective bargaining. The National Labor Relations Board (NLRB) or similar federal, state or local agency usually defines a bargaining unit.

Card Check: Process through which workers demonstrate their desire to form a union, usually by signing an authorization card; the employer must remain neutral.

Certification: Official recognition by a labor relations board that an employee organization is the exclusive representative for all the employees in an appropriate bargaining unit for the purpose of collective bargaining.

Collective Bargaining: A method of determining terms and conditions of employment through negotiation between representatives of the employer and the union representing employees.

Collective Bargaining Agreement, or Contract: A formal written agreement over wages, hours and conditions of employment entered into by an employer and the union representing the employees in the bargaining unit.

Duty of Fair Representation: The union's obligation, as the exclusive bargaining representative of a group of employees, to represent fairly all employees in the bargaining unit in grievance handling as well as contract negotiations.

Employee Free Choice Act: Legislation introduced in 2009 to enable workers to form unions when a majority sign union authorization cards; establish mediation and binding arbitration when the employer and the workers cannot agree on a first contract; and strengthen penalties for companies that violate workers' rights.

Exclusive Representative: The employee organization that, as a result of certification by a labor board, has the right to be the sole collective bargaining agent of all employees in an appropriate bargaining unit.

Fair Share: A provision bargained in many contracts that requires all employees covered by the collective bargaining agreement to pay their "fair share" of dues even if they choose not to become union members.

Free Rider: An employee who fails to join the union that has negotiated the contract over his or her wages and working conditions, all the while benefiting from that contract.

Fringe Benefits: Vacations, holidays, insurance, medical benefits, pensions and other economic benefits that are provided to employees under the union contract; these are in addition to direct wages.

Grievance: A procedure described in the contract to remedy work-related problems such as abuse of employee rights or contract violations.

Grievance Arbitration: A dispute resolution process whereby a neutral third party — the arbitrator — hears a grievance and makes a decision that is usually both final and binding on both parties.

Interest Arbitration: A procedure used to settle matters in contract disputes between the union and management in some bargaining units covering specific occupation groups that, by statute, are prohibited from striking. These occupations are usually related to public safety (e.g., hospital workers, police, firefighters, etc.).

Labor Board: Quasi-judicial agency set up under national or state labor relations acts. Its duties include defining appropriate bargaining units, conducting elections to determine if workers want union representation, certifying unions to represent employees, and hearing and adjudicating complaints by either the union or the employer charging unfair labor practices.

Pay Equity: A term addressing the idea that female-dominated jobs or professions that have been traditionally undervalued, based on levels of responsibility and required education, should be raised to pay levels of comparable jobs traditionally held by men.

Picketing: Workers carrying signs and/or distributing literature protesting working conditions or actions taken by the employer. Picketing occurs during a strike or as an "informational" picket. The purpose of the tactic is to put pressure on the employer by informing the public and other workers about unfair working conditions.

Representation Election: A vote conducted by an appropriate labor board or agency to determine whether a majority of the workers in a previously established bargaining unit want to be represented by a given union.

Seniority: Preference accorded employees, based on length of service with an employer, in such areas as layoff, recall, promotion, transfer, vacation accrual, scheduling, shift assignment, etc.

Service Fee: A monetary assessment of non-members in a bargaining unit to help defray the union's costs in negotiating and administering the contract (see Agency Shop).

Strike: A concerted act by a group of employees who withhold their labor for the purpose of affecting a change in wages, hours or working conditions.

Unfair Labor Practice: An employer or union practice forbidden by the National Labor Relations Board, the Civil Service Reform Act (for federal workers) or state and local laws, subject to court appeal. It often involves the employer's efforts to avoid bargaining in good faith. Other examples may include management's failure to provide relevant information the union has requested for either bargaining or grievance handling purposes or management's repeated failure to implement grievance settlements or arbitration awards. Some state laws may use the term "prohibited practices."

Appendix D

A Union Leader's Bookshelf (and Other Resources)

Publications

AFSCME officers and executive board members will find the publications listed below helpful in their work. Items are available on the AFSCME website **afscme.org/publications** unless otherwise noted.

- AFSCME International Constitution
- Your local's (or chapter) constitution (available from your council or affiliate)
- AFSCME Financial Standards Code
- AFSCME Local Union Election Manual
- AFSCME Steward Handbook
- *The Family and Medical Leave Act: AFSCME's Comprehensive Guide for You, Your Family and Your Union*
- *Stopping Sexual Harassment: An AFSCME Guide*
- *Safe Jobs Now: An AFSCME Guide to Health and Safety in the Workplace*



From sources other than AFSCME, there are many other helpful publications for AFSCME officers and activists. These include:

- Four books by Robert Schwartz: *The Legal Rights of Union Stewards, How to Win Past Practice Grievances, The FMLA Handbook and Strikes, Picketing and Inside Campaigns*. All are written in an easy-to-read, question-and-answer format and cover all the bases on their respective topics. Available at **workrightspress.com** or by calling 800-576-4552.

- *The Union Steward's Complete Guide*, 2nd edition, edited by David Prosten. Topics range from the basics of grievance handling to dealing with difficult supervisors to increasing member involvement in the union in a changing workplace. Available from **unionist.com** or by calling 800-321-2545.

- *The Union Member's Complete Guide*, by Michael Mauer. Guide offers an easy-to-read, thorough explanation of what unions are, how they work and the rights and responsibilities of union members. Available at, **unionist.com** or by calling 800-321-2545.
- *A Troublemaker's Handbook 2*, edited by Jane Slaughter. Workplace strategies manual covers all the how-tos: agitating for better conditions, workplace actions, winning good contracts, organizing new members and much more. Available at **troublemakershandbook.org.** Also available from **unionist.com** or by calling 800-321-2545.
- *Organizing for Social Change*, 4th edition, by Kim Bobo, Jackie Kendall and Steve Max. Comprehensive tool for organizers and leaders determined to create change covers everything from coalition building to using the media. Published by the Midwest Academy and available for purchase from **unionist.com** or by calling 800-321-2545.
- *Parliamentary Procedure and Effective Meetings*, by Gene Daniels and Larry Casey. Designed as a workbook, this realistic guide on how to run and participate in union meetings offers real-world advice on setting agendas, dealing with difficult people and boosting attendance. Available from **unionist.com** or by calling 800-321-2545.
- *Robert's Rules of Order*, Newly Revised, 10th edition. Book covers parliamentary procedure from A to Z. Available at all major bookstores.

Websites

The most up-to-date source of information is **afscme.org**. AFSCME leaders should periodically check AFSCME's website for updated information, resources and helpful links. Contents of the site include:

- Up-to-date information on political, legislative, and policy issues that affect AFSCME members
- News about AFSCME organizing victories around the country
- Bargaining topics and data
- Hundreds of manuals, brochures, handbooks, fact sheets, etc., that can be downloaded and printed, on the publications page
- Links to other websites useful to AFSCME activists, including:
  - AFSCME affiliates
  - other labor unions and organizations

- government agencies
- resources organized by topics that include member benefits, bargaining, privatization, retirees, health and safety, etc.

There are a growing number of union-related websites on the Internet. In addition to the AFSCME home page **afscme.org**, other useful sites include:

- **aflcio.org:** Up-to-date news, information, publications and more from the AFL-CIO
- **unionstats.com:** Private and public sector labor union membership, coverage and density estimates (1973- present) compiled by the Census for the Bureau of Labor Statistics
- **labourstart.org:** A daily update of labor-related news
- **unionist.com:** Graphics, news and information for union leaders, stewards and activists; excellent source for union-related publications
- **faireconomy.org:** Site of United for a Fair Economy, a network of progressive economists that strives for greater economic equity
- **laborheritage.org:** Site of the Labor Heritage Foundation, which works to strengthen the labor movement through music and the arts

Appendix E

Sample Orientation Kit

The local should develop and distribute an orientation packet that informs new workers about the union. Your council or parent local may have an orientation packet that you can use and expand upon as you desire.

The best chance to sign up new members is when they first arrive on the job. Some contracts allow the union to make a presentation to new employees. A local can present the orientation packet to potential members at that time. Or, a steward or MAT leader can personally contact each potential member to deliver the packet and talk about joining and being active in the union.

Here's a checklist of suggested items to include in a new employee or orientation kit:

- ❑ Welcome letter from the local union president
- ❑ Local contract
- ❑ Local union constitution or bylaws
- ❑ Local/council newsletter
- ❑ List of local officers, stewards and MAT leaders with names and contact information (e-mail and phone numbers)
- ❑ Membership authorization card
- ❑ PEOPLE brochure and MVP sign-up card
- ❑ Information about your council or parent local
- ❑ "Members only" benefits literature or AFSCME Advantage brochure
- ❑ Copies of brochures describing the structure and services of the International Union: We Make America Happen and Questions and Answers About AFSCME (available through the AFSCME General Services Department: 202-429-1234)
- ❑ Card describing a member's Weingarten rights
- ❑ Membership meeting notice

You can supplement these items with other materials that your local may have available, such as bumper stickers, contract surveys, flyers regarding upcoming events, etc.

Appendix F

How to Chair a Meeting

1 Call to Order

Start Your Meeting on Time.

Rap your gavel and say: **"I call this meeting to order."** Wait for quiet, and then begin the meeting.

2 Roll Call of Officers

The Chair says: **"The Recording Secretary will call the Roll of Officers."** The Recording Secretary then calls the roll in a loud, clear voice, with pauses for response.

- Sometimes an amendment to the motion on the floor may be offered. An amendment must be seconded and then discussed. The Chair should say: **"An amendment has been made and seconded that ... Is there any discussion on the amendment?"** A vote is first taken on the amendment. After the amendment is decided on, the discussion returns to the main motion (as amended if the amendment was passed). A vote is then taken on the main motion.

- During a discussion of a motion or amendment, make sure that each member speaks only once until all other members have had an opportunity to speak. It is a good idea to alternate speakers for and against the motion. If members begin responding to and addressing remarks to each other, remind the group that all comments should be addressed to the Chair. The discussion and debate is for the group as a whole to participate in. It is not an argument between a couple of members.

- A member may raise a **"Point of Information."** For instance, he or she might state: **"Point of Information. I don't understand the intent of this motion."** The Chair should then clarify the intent of the motion or provide the information being requested. You may have to remind the member that a point of information is a question, not a statement.

- Sometimes a member may rise on a **"Point of Order,"** saying something like: **"Point of Order. This discussion does not pertain to the motion on the floor."** The Chair should make a ruling and say something like: **"Your point is well taken and I direct the member speaking to address the motion on the floor."**

- There are times when discussion on a topic begins but no motion has been made. In this instance, the Chair may call for a motion by saying, **"Does the Chair hear a motion to ...?"** Of course, this motion must be seconded and the Chair should restate the motion before asking if there is discussion.

For a chart on Key Parliamentary Rules, see Appendix E of the AFSCME *International Constitution.* For a detailed description of "Robert's Rules of Order," see *Parliamentary Procedure at a Glance* by O. Garfield Jones. This can be ordered from: AFSCME F-2 Orders, 1625 L Street, N.W., Washington, D.C. 20036-5687, 202-429-1234.

3 Reading of Minutes

The Chair says: **"The Secretary will read minutes of the last meeting."** Alternatively, copies of the minutes can be distributed at the meeting and the Chair says: **"Instead of having the Secretary read the minutes, copies have been distributed for your review."**

After the minutes are read or reviewed, the Chair asks: **"Are there any additions or corrections to the minutes? [Pause.] If not, the minutes will stand approved as read."** If corrections to the minutes are made, ask for unanimous consent to additions or corrections at this time. If there is an objection to any addition or correction, it will be necessary to adopt a motion to make that change.

4 Reading of Correspondence

The Chair says: **"The Recording Secretary will now read the correspondence."**

The Recording Secretary should then read any important correspondence, summarizing the content when appropriate.

Any letter requiring action by the membership should be discussed by the Executive Board prior to the membership meeting. At the membership meeting, the letter should be read along with the recommendations of the board. A motion should be made to adopt the board's recommended action. That motion should then be discussed and voted on by the members.

Routine letters should not be taken up at the membership meeting.

5 Reports of Officers

The **President's Report** might include such topics as:

- Problems facing the local
- Summary of topics discussed at the latest Executive Board meeting
- Updates on issues affecting the members
- Actions the Executive Board recommends that the local take

If the President's Report contains any actions recommended by the Executive Board, a motion should be made to adopt the board's recommended action. That motion is then discussed and voted on by the members. To initiate discussion, the Chair may say something like: **"Does the Chair hear a motion to accept the Executive Board's recommendation?"**

Secretary-Treasurer's Report: This report should be copied and passed out at the meeting. See a sample report in the *AFSCME Officers Handbook*, Appendix A, or in material following Appendix E of the AFSCME *International Constitution*.

The Chair asks: **"Does everyone have a copy of the Secretary-Treasurer's Report? [Pause.] Are there any questions? [Pause.] If there are no objections, the Secretary-Treasurer's Report will stand approved."**

If someone raises an objection, a motion of approval is required.

6 Reports of Staff and Committees

Staff Report:
This may include the latest information on political and legislative issues, organizing campaigns, important grievances, council activities, an update on contract negotiations, or any other information of current interest to the membership.

Committee Reports:
Before the membership meeting, the President should talk with each committee chairperson and go over his/her Committee Report. Reports from any given committee should be made only when there is something worthwhile to report.



To introduce these reports, the Chair would say:
"We will now hear a report from the _____ Committee."



If a committee report contains specific recommendations, which call for membership action, then after the report is given the Chair would say:
"You have heard the report of the _____ Committee, with the recommendation that the membership authorize _____. Does the Chair hear a motion to adopt the _____ Committee's recommendation?"

7 Unfinished Business

Unfinished Business: Includes any items that require membership action that are left over, or postponed, from a previous meeting.



The Chair would say something like:
"We have some old, unfinished business to take care of."

The Chair can then review the topic. This may be followed by a motion dealing with the specific item of unfinished business.

8 New Business

New Business: Includes items raised at this meeting, which were not necessarily included on the agenda, and which require membership action. This is the membership's chance to raise issues that are not included on the agenda.



To open this part of the meeting, the Chair would say:
"Is there any new business?"

For the group to make a decision on any new business brought up at a meeting, remember what is required: a motion, a second, a chance for discussion and a vote.

9 Good and Welfare

Good and Welfare: A local may have a Good and Welfare Committee. If it does not, this part of the meeting can be used to discuss such things as sending cards or flowers to hospitalized members, soliciting donations for community food banks, announcing happy events like marriages and births, etc. It may also be used for some planned activity, such as a visiting speaker or training. Consider moving this item earlier in the agenda if such an activity is planned.

The Chair asks: **"Is there any Good and Welfare?"**

10 Adjournment

Adjourning the Meeting: When the business of the meeting is finished, and if no one has made a motion to adjourn, the Chair should ask for one by saying: **"Do I hear a motion to adjourn?"**

A motion to adjourn must be seconded, and is then voted on without debate.

Some Additional Notes for the Chairperson

- The Chair should make sure that all reports given at the meeting are brief and to the point. This will help keep the whole meeting short. People are more likely to attend meetings that are run efficiently and end on time!

- When a motion is made it must be seconded. The Chair should then state the motion and call for discussion: **"It has been moved and seconded that ... Is there any discussion?"**

- Sometimes an amendment to the motion on the floor may be offered. An amendment must be seconded and then discussed. The Chair should say: **"An amendment has been made and seconded that ... Is there any discussion on the amendment?"** A vote is first taken on the amendment. After the amendment is decided on, the discussion returns to the main motion (as amended if the amendment was passed). A vote is then taken on the main motion.

- During a discussion of a motion or amendment, make sure that each member speaks only once until all other members have had an opportunity to speak. It is a good idea to alternate speakers for and against the motion. If members begin responding to and addressing remarks to each other, remind the group that all comments should be addressed to the Chair. The discussion and debate is for the group as a whole to participate in. It is not an argument between a couple of members.

- A member may raise a **"Point of Information."** For instance, he or she might state: **"Point of Information. I don't understand the intent of this motion."** The Chair should then clarify the intent of the motion or provide the information being requested. You may have to remind the member that a point of information is a question, not a statement.

- Sometimes a member may rise on a **"Point of Order,"** saying something like: **"Point of Order. This discussion does not pertain to the motion on the floor."** The Chair should make a ruling and say something like: **"Your point is well taken and I direct the member speaking to address the motion on the floor."**

- There are times when discussion on a topic begins but no motion has been made. In this instance, the Chair may call for a motion by saying, **"Does the Chair hear a motion to ...?"** Of course, this motion must be seconded and the Chair should re-state the motion before asking if there is discussion.

For a chart on Key Parliamentary Rules, see Appendix E of the AFSCME *International Constitution*.

For a detailed description of "Robert's Rules of Order," see *Parliamentary Procedure at a Glance* by O. Garfield Jones. This can be ordered from: AFSCME F-2 Orders, 1625 L Street, N.W., Washington, D.C. 20036-5687, 202-429-1234.

Robert's Rules of Order
Chart of Motions & Procedures

These motions are listed in order of precedence. A motion can be introduced if it is higher on the chart than the pending motion.

Purpose	You Say	Can Interrupt	Requires a Second	Debatable	Can be Amended	Vote Required
Close the meeting	I move to adjourn	No	Yes	No	No	Majority
Register a complaint	I rise to a question of privilege	Yes	No	No	No	None
Lay the motion aside temporarily	I move to table the motion	No	Yes	No	No	Majority
End debate	I call the question; OR I move to end debate	No	Yes	No	No	2/3
Limit or extend debate	I move that debate be limited to...	No	Yes	No	Yes	2/3
Postpone to a certain time	I move to postpone the motion to...	No	Yes	Yes	Yes	Majority
Refer to a committee	I move to refer the motion to...	No	Yes	Yes	Yes	Majority
Modify the wording of the motion	I move to amend the motion by...	No	Yes	Yes	Yes	Majority
Postpone the decision indefinitely	I move that the motion be postponed indefinitely	No	Yes	Yes	No	Majority

No order of precedence. These motions arise incidentally and are decided immediately.

Purpose	You Say	Can Interrupt	Requires a Second	Debatable	Can be Amended	Vote Required
Enforce the rules	Point of order	Yes	No	No	No	None
Submit the matter to the group	I appeal the decision of the Chair	Yes	Yes	Varies	No	Majority
Suspend the rules	I move to suspend the rules	No	Yes	No	No	2/3
Divide the motion	I move to divide the question	No	Yes	No	Yes	Majority
Demand rising vote	I call for a division	Yes	No	No	No	None
Ask a question about parliamentary procedure	Parliamentary inquiry	Yes	No	No	No	None
Request for information	Point of information	Yes	No	No	No	None

No order of precedence. Introduce only when nothing else is pending before the group.

Purpose	You Say	Can Interrupt	Requires a Second	Debatable	Can be Amended	Vote Required
Take the matter from the table	I move to take from the table	No	Yes	No	No	Majority
Cancel a previous action	I move to rescind	No	Yes	Yes	Yes	2/3; or Majority with notice
Reconsider a motion*	I move to reconsider the vote	No	Yes	Yes, if motion it applies to is debatable	No	Majority

* can be made only by someone who voted for the prevailing side in the previous vote on the motion

AFSCME's Online LEADERSHIP Academy



AFSCME's Online Leadership Academy

- **offers FREE online classes 24/7 for officers, activists, members and staff**
- **features topics such as parliamentary procedure, AFSCME's financial standards, and more…**
- **provides downloadable fact sheets, publications and educational materials**

- **Register for classes at academy.afscme.org**
- **Contact Education@afscme.org for details**

AFSCME Leadership Academy



American Federation of State, County and Municipal Employees, AFL-CIO

1625 L Street, NW
Washington, DC 20036
AFSCME.org

Lee Saunders
President

Elissa McBride
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