



# Local Officers Resource Guide

Summer 2022





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# AFGE Strategy

## Vision

To ensure justice, equality, fairness and dignity for workers and their families through a proactive labor movement as the premier union for workers in government service.

## Mission

To build a large, inclusive, powerful, effective union for workers in government service.  
Core Values

- AFGE is a Community of workers dedicated to improving the quality of life for all.
- It is our right to Justice, Equality, Fairness and Dignity.
- We are Accountable to our members and the public we serve.
- We Adapt to succeed in our changing environment.
- We determine our future through Collective Action and coalition building.
- Democracy is the cornerstone of AFGE.
- Diversity and Inclusion are reflected throughout AFGE.
- Integrity, Honesty and Service guide our path.
- To Join a Union and Bargain Collectively are basic human rights.
- Solidarity with organizations that share our values.

## Guiding Principles

- Build on the power of the union
- Engage new leaders
- Energize and activate current members
- Energize and activate potential members

## Strategic Objectives

- Organizing
- Legislative Mobilization
- Political Influence
- Strong Local Unions
- Education / Communication



# Chapter 1: AFGE Mission, Governance, and Structure



# AFGE Mission, Governance, and Structure

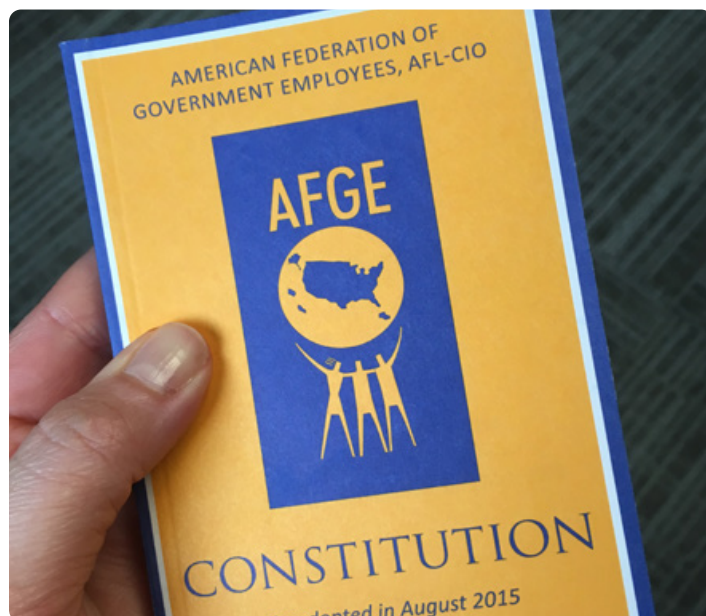
## Learning Objectives:

- Identify basic elements of the history and structure of AFGE
- Explain the purpose and authority of AFGE's National Convention
- Describe the geographical division and leadership of AFGE's Districts
- Identify where Union dues go

## AFGE Overview and Structure

The American Federation of Government Employees was formed in 1932. AFGE is the largest federal employee union, representing about 670,000 federal and D.C. government employees, over 300,000 of whom are dues paying members. AFGE represents employees in nearly every federal department and agency, in addition to government employees in the District of Columbia. Our highest membership concentrations are in the Department of Veterans Affairs, the Social Security Administration, the Department of Defense, and the Department of Justice.

AFGE itself is comprised of the National Executive Council, the National office headquarters, and 12 geographic districts consisting of some 1,100 locals.



## AFGE Governance

### AFGE Constitution

The AFGE Constitution sets forth the rules by which the union conducts its business. Just like the Constitution of the United States, it is a living, changing document. It has the legal force of a contract. The democratically elected delegates to the AFGE convention have the power to change or amend the Constitution. You can find the full current Constitution online at [www.afge.org/Constitution](http://www.afge.org/Constitution)

### National Convention

The National Convention, held every three years, is the highest governing authority of AFGE. The Convention has the authority and power to:

- Interpret and amend the AFGE Constitution
- The Constitution sets forth the rules by which the union conducts its business, and can only be changed or amended during the Convention
- Adopt laws and policies
- Elect the National President, the Secretary-Treasurer, and the National Vice-President for Women's and Fair Practices
- Establish per capita dues to the National
- Act as a final court of review for members

Once the Convention makes a decision, that decision stands, and must be carried out by all officers and employees of the Union. Convention action can only be changed by a later Convention or by a referendum of the membership.



**Locals**

AFGE has more than 1100 chartered local unions in the United States and its territories. Members elect the officers and delegates of their local and send them as representatives to the AFGE National Convention. All AFGE members including National Officers, National Vice Presidents, District Coordinators, and Local Officers, must be members in good standing in their home local.

**National Bargaining Councils**

AFGE has more than 121 chartered Councils. Locals must be in good standing to be affiliated with AFGE Councils. Approximately 30 of these are Bargaining Councils.

Bargaining Councils typically:

- Represent member locals at the agency level of the labor and management relationship
- Elect its own officers at its own convention attended by locals in the council
- Negotiate agency-wide contracts covering council locals
- Lobby for its locals’ issues

**National Executive Council**

Between AFGE National Conventions, the NEC is the policy making and governing body of the Union. The NEC monitors legislative matters directly affecting federal and D.C. government employees and initiates legislative

action as directed by the National Convention.

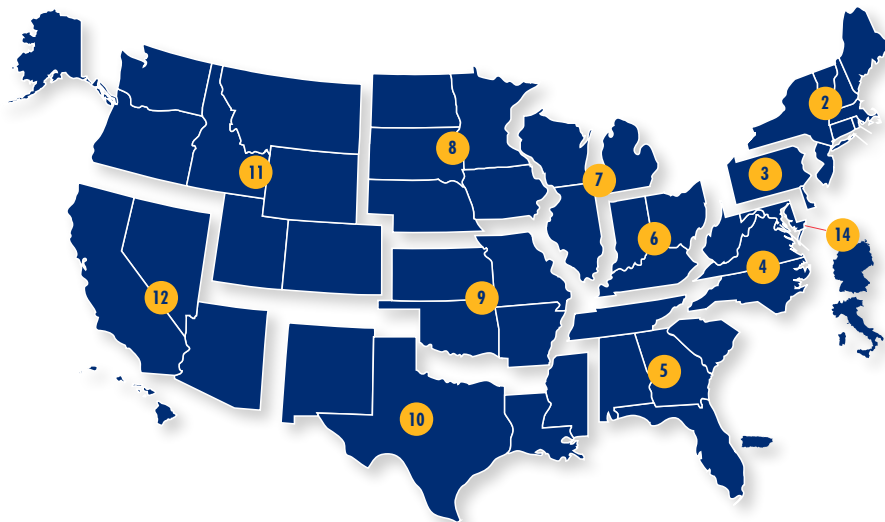
The Executive Board consists of the:

- National President
- National Secretary-Treasurer
- National Vice President for Women’s and Fair Practices
- Twelve National Vice Presidents

The NEC has the responsibility for instructing locals to affiliate and actively cooperate with central, state, district, or regional labor bodies in their respective localities. The NEC is empowered by the National Constitution to use every legitimate means to consolidate or merge locals, irrespective of district boundaries, with the purpose of creating stronger union entities and eliminating fragmented organizations.

**Districts**

AFGE is structured into 12 geographic districts. Each District has a National Vice President (NVP) and staff. The Districts are responsible for carrying out the goals and programs of AFGE. Delegates representing the locals within each District elect a National Vice President every three years at a District caucus. In addition to electing a NVP, at each District



AFGE DISTRICT BREAKDOWN	
2	CT, MA, ME, NH, NJ, NY, RI, VT
3	DE, PA
4	MD, NC, VA, WV
5	AL, FL, GA, SC, TN Puerto Rico, Virgin Islands
6	IN, KY, OH
7	IL, MI, WI
8	IA, MN, ND, NE, SD
9	AR, KS, MO, OK
10	LA, MS, NM, TX, Panama
11	AK, CO, ID, MT, OR, UT, WA, WY Okinawa, Guam
12	AZ, CA, HI, NV
14	DC, EUROPE: Italy

triennial caucus a District elects a Fair Practices Affirmative Action Coordinator and a National Woman's Advisory Committee member.

## Duties of National Officers and Staff

**National President (NP)** - the principal officer and official speaker for the Union. His/her duties include:

- Administering and implementing policies between National Executive Council (NEC) meetings and the AFGE conventions
- Presiding over the convention and meetings of the National Executive Council, including planning Convention and NEC meeting logistics
- Serving as an AFL-CIO Vice President and member of the AFL-CIO executive board

**National Secretary-Treasurer (NST)** - charged with maintaining the Federation's documents, fiduciary records, and property, including:

- Receiving all monies and disbursing monies of AFGE in payment of obligations
- Investing surplus funds, directing audits of affiliates, and maintaining Union membership records
- Submitting financial reports to the National Executive Council and at the National Convention, as well as submitting required financial reports to the Department of Labor and the IRS
- Ensuring that District, Council, and locals receive the information and forms they need to conduct elections and to elect delegates to the National Convention

**National Vice President for Women's and Fair Practices** - since 1985, the Women's Director, now NVP, has supervised both the Women's Department and the Fair Practices Department (formalized in the Constitution by the 1997 Convention). Together, these departments are responsible for:

- Advocacy and training on family and medical leave, child care, sexual harassment, and the impact of domestic violence on the workplace
- Enforcing AFGE's internal sexual harassment

policy

- Providing civil rights expertise to the Federation and concentrating on significant EEO representation matters of AFGE locals and members
- Overseeing the Human Rights Committee's (HRC) budget and facilitating the communication and activity of the HRC

## National Vice Presidents

Each of the 12 **AFGE National Presidents (NVPs)** is responsible for supervising all policies and programs of the Union within a District. The NVP is elected every three years at a District caucus. Within their District, NVPs are charged with:

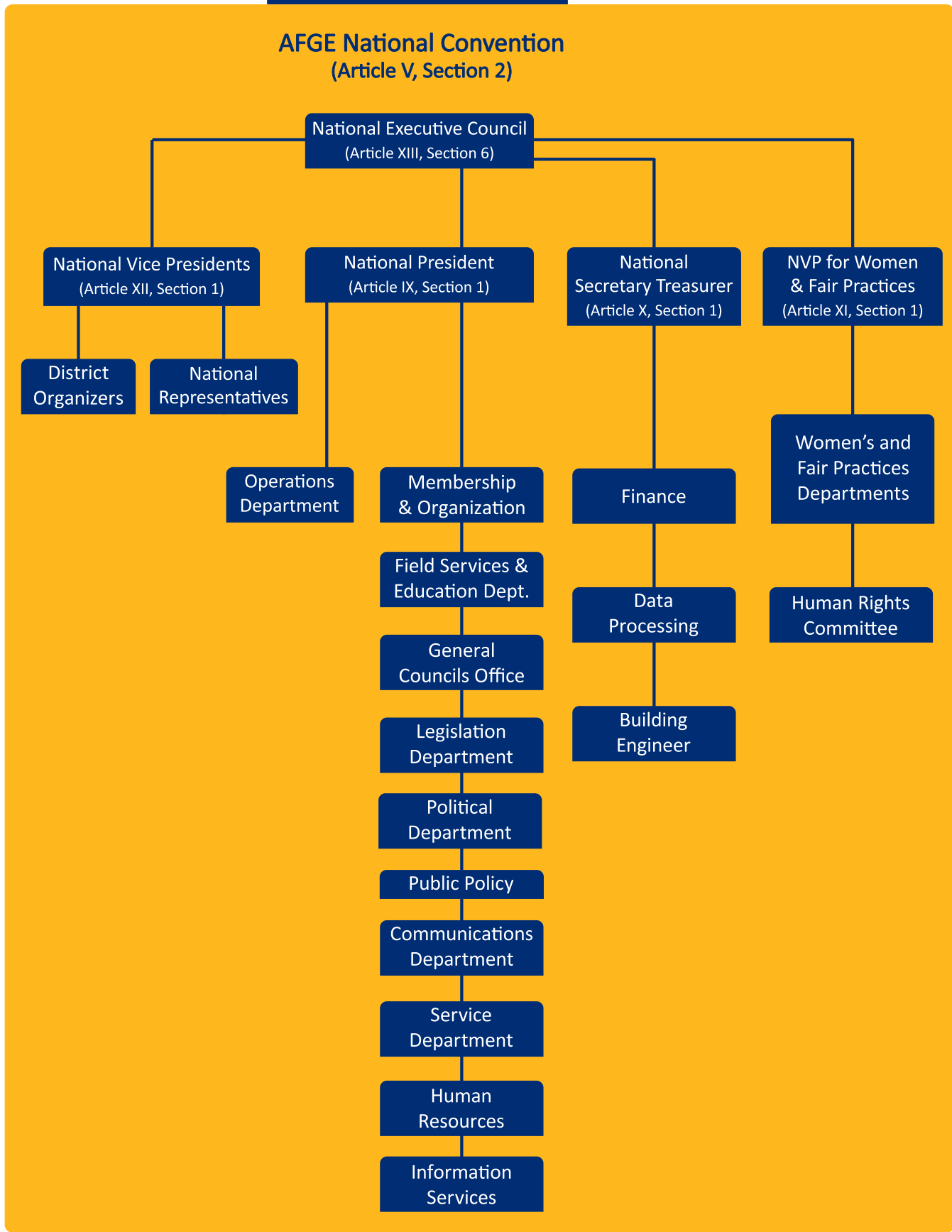
- Supervising and directing National Representatives assigned to their District
- Assisting locals in negotiating and implementing contracts
- Handling grievances and appeals at the district level up to and including the regional level

## Other District officers

Each district has two additional officers, also elected every three years: a **Fair Practices Coordinator** and a **Women's Coordinator**, whose duties include:

- Assisting local Women's and Fair Practices Coordinators in implementing District and National Human, Women, and Civil Rights programs at the local or Council levels
- Working with AFL-CIO constituency groups and other organizations to improve the coalition base
- Working with locals to ensure local Women's and Fair Practices Coordinators are appointed or elected
- Lobbying and engaging local legislators on issues and mobilizing AFGE members around civil, women's and workers' rights in the District.

**AFGE Organizational Chart**



## Non-Elected Staff

AFGE staff, both at the National Headquarters and in the field, support departmental functions.

**National Organizers (NOs)** work at headquarters and are dispersed throughout the field. NOs direct and support organizing campaigns throughout the Union under the supervision of the Director of Membership and Organizing.

**National Representatives (NRs)** are dispersed throughout the Districts and are under the supervision of the NVPs. Most NR's are assigned to assist specific locals by the NVP. They are responsible for assisting these locals in meeting all of the goals of the Union.

**Legislative Political Organizers (LPOs)** direct and support grassroots lobbying and political action efforts.

## AFGE Departments

**General Counsel:** responsible for providing legal counsel, analysis, and assistance to the National President and other general officers, the NEC, Council Presidents, Local Presidents, National Representatives, and National Office departments. GCO litigates before federal, state, and local courts and administrative agencies.

**Field Services and Education Department:** provides staff expertise in collective bargaining, legal representation, personnel system changes and other areas of direct relationship between AFGE affiliates and agency management. Education staff develop and deliver training and resources to AFGE activists, leaders, officers and staff through both in-person and online courses.

**Membership & Organization Department:** assists in increasing and maintaining the membership by assisting AFGE Districts, Councils, Caucuses, and locals with a mobilization structure. Provides training in organizing, mapping and developing organizing committees

**Legislative Department:** lobbies Congress and the Administration, educates grassroots activists to lobby Congress, and makes recommendations on campaign contributions that will enhance our legislative program.

**Political Action Department:** works with field staff at the local and state level to train LPCs, mobilize locals, and work with local legislatures. to lobby around legislative issues.

**AFGE-PAC (Political Action Committee):** allows members to pool our money to support candidates who stand up for federal workers. In concert with the



Legislative Department, our non-partisan PAC works to elect pro-worker candidates at the local, state, and national level and to involve AFGE members in the political process.

**Public Policy Department:** researches and advocates for AFGE members on federal employee issues including pay, benefits, job security, and workplace health and safety.

**Communications Department:** works to promote respect and appreciation for federal workers both locally and nationally via websites, social media, videos, media relations, and publications. Communications also ensures that members are kept informed of issues and policies that affect their jobs and families. Ensures that AFGE's message is widely dispersed at the national and local levels.

**Service Department:** prepares mass mailings, designs and prints AFGE publications and training materials, receives and distributes mail, and processes requests from locals for AFGE graphics and materials.

**Human Resources Department:** provides professional and administrative support for the personnel needs of AFGE employees.

**Information Services Department:** facilitates growth, engagement, and education throughout the Federation by providing secure, user-friendly, and reliable information solutions. The Department operates IT Help Desk, Information Security, and Application Development services.

**The Finance Department:** performs a wide range of services, including financial reporting, membership tracking, billing, and payroll and expense processing. By providing information and financial trends to the NEC, Districts are able to better track their membership and monitor their expenses.

**Building Operations:** performs routine preventive maintenance and repair of the national headquarters building including mechanical engineering, electrical, plumbing, and heating and cooling.

## Union Dues

Effective January 1, 2016, the per capita tax is \$21.96 per member per month for insured locals (\$2.55 per retired member per month) and for uninsured locals, \$20.91 per member per month (\$1.50 per retired member per month). The AFGE Constitution requires that each local's due structure be sufficient to fund the operating costs of the local.

### Who Decides How Much Dues We Pay?

AFGE members decide the dues structure of their local. The recommended dues amount, per member per year, is twice the national per capita tax. The convention delegates who are elected by the rank and

## Where do Union Dues Go?

### The Local Union Share (35%)

- Representation on day-to-day problems
- Grievance and arbitration
- New member orientation
- Participation in union training and events
- Local union communications
- Special benefits plans for members

### The District Share (27%)

- Data processing and administration
- Representation
- Education and training
- Legislative and political action
- Membership and organizing

### The National Share (38%)

- Data processing, governance, administration
- Membership and organizing
- Legal defense
- Legal advocacy
- Representation
- Communications
- Public policy research
- Legislation and political action
- Education and leadership development
- Women's and Fair Practices work

file members establish the minimum dues structure for the national per capita tax.

### What Are Dues Used For?

At all levels of the union — Local, District and the National — our dues are used for:

- Negotiating collective bargaining agreements using negotiators, public policy researchers, union reps, and field staffers to organize rallies, worksite actions, and press events.
- Defending members and enforcing contracts requires money for legal help as well as grievance and arbitration expenses and a national grievance tracking system, CaseTrack.
- Winning improved legislation for government employees in pay, benefits, and job protections by lobbying, research, and testifying in Congress, and holding town halls and other regional meetings.
- Recruiting new members and organizing current members in Lunch and Learns, Metros, and Union Fairs.
- Occupational safety and health programs to protect government employees from asbestos, repetitive stress injury, blood borne diseases, and other workplace hazards.
- Education and training including leadership classes, occupational safety and health

programs, national and district training conferences, videos and DVDs, online learning, and guides like this one.

- Communications including media campaigns, public relations, opinion surveys, web site development, and AFGE Publications including the Government Standard, Capitol Report, the Equalizer, and Rep Wing.
- Legal defense, and other worker funds.
- Office rents, travel, supplies, and administration.
- Support for programs on civil and human rights, equal opportunity, senior members, and organizing.
- Membership in the AFL-CIO and the Canadian Labor Congress as well as state and local labor federations and councils.

### AFL-CIO

When AFGE was chartered in 1932, it joined the American Federation of Labor (AFL), one of the largest coalitions of Unions within the U.S., founded in 1886. The AFL merged with the Congress of Industrial Organizations (CIO) in 1955, and AFGE has been affiliated with the AFL-CIO ever since.

Today the AFL-CIO acts as an umbrella federation for 56 unions, including AFGE. The AFL-CIO represents over 12.5 million workers in a wide variety of fields, including government workers, teachers, actors, and electricians. The AFL-CIO's mission is to advance social and economic justice in our nation by enabling working people to have a voice on the job, in government, and in their communities. By affiliating with the AFL-CIO on the local level, we guarantee that issues affecting government employees will be heard. The AFL-CIO functions on three levels:

### The Central Labor Councils and Area Labor Federations

The nearly 570 central labor councils (CLCs) chartered by the AFL-CIO give working families a voice in cities, towns, and counties. The CLCs and Area Labor Federations (ALFs) focus on county or city lobbying,



city or county elections, county or city zoning and other economic issues, and more local needs.

AFL-CIO Field Representatives provide assistance and training to the State Federations and the CLCs. The AFL-CIO field staff relate to the CLCs in the same way that NRs relate to AFGE local unions. Affiliation with the CLC is separate from the automatic affiliation all AFGE locals have with their State Federations of Labor, and requires the payment of a per capita tax to the CLC. Each AFGE local participates in their CLC through election of local delegates.

### The State AFL-CIO

More commonly known as “State Federations,” the 52 State Federations (including Puerto Rico) coordinate political and legislative activity with local unions to give working families a voice in every State Capital and to gain the ear of each U.S. Congress and Senate member in their home districts. The State Federations are led by officers and boards elected by delegates from local unions and are chartered by the national AFL-CIO.

AFGE Locals are automatically affiliated with all state federations. There are many benefits to working with the State Federations, Central Labor Councils, and Area Labor Federations in your state.

The State AFL-CIO or State Federations focus on state legislative lobbying, statewide economic policy, state elections, and other similar issues. The State Federation sends delegates to the National AFL-CIO quadrennial convention.

Both state federations and local bodies work to mobilize members around organizing campaigns, collective bargaining campaigns, electoral politics, lobbying, strikes, picketing, boycotts, and similar needs.

### The National AFL-CIO

The National AFL-CIO is governed by quadrennial convention. Elected delegates of all AFL-CIO union affiliates set broad policies and goals for the union movement and every four years elect the AFL-CIO officers—the President, Secretary-Treasurer, Executive Vice President and 51 Vice Presidents. These officers make up the AFL-CIO Executive Council, which guides the daily work of the federation. AFGE’s National President and the National Vice President for Women’s and Fair Practices hold seats on the AFL-CIO Executive Council.

The AFL-CIO also has various constituency groups chartered and funded by the AFL-CIO, including the Phillip Randolph Institute, Alliance for Retired Americans, Coalition of Black Trade Unionists, Coalition of Labor Union Women, Asian Pacific American Labor Alliance, Pride at Work, and Labor Council for Latin American Advancement. There are also Allied Groups – independent organizations that work closely with the AFL-CIO to promote common causes such as social and worker justice. These groups include JWJ (Jobs with Justice), and IWJ (Interfaith Worker Justice).

To learn more about the AFL-CIO, please visit their website at [www.aflcio.org](http://www.aflcio.org).

## Chapter Review Questions:

1. Who or what has the ultimate authority over AFGE?
2. How do individual AFGE members influence decisions made at the National Convention?
3. Name three actions carried out at the National Convention.
4. What three offices are elected at the District level?
5. Your Union dues are divided into Local, District, and National shares. Name one function in each that your dues helps to support.
6. What is the purpose of affiliating with the AFL-CIO?





# Chapter 2: Big Enough to Win & Strategic Planning



# Big Enough to Win & Strategic Planning

## Learning Objectives:

- Understand the goals and purpose of AFGE's Big Enough to Win plan
- Describe what a strong and effective local looks like
- Articulate the importance of strategic planning and best practices at the local level

## AFGE National Leadership Meeting

In 2013 more than 700 AFGE leaders came together in Orlando. Attendees at the National Leadership Meeting spent four days intensely discussing where we've been and where we must go in order to build this union. Together we created a shared vision for the future of our union and we called it Big Enough to Win.

The Big Enough to Win plan united AFGE leaders at all levels to:

- Organize more members to become stronger.
- Build our legislative and political power.
- Strengthen every local.
- Increase quality and quantity of training and communication.

## When AFGE leaders and activists come together, there's nothing we can't accomplish.

Thirty years ago, AFGE faced declining membership and a diminished voice on the Hill. But we confronted the crisis, invested in our union, and built a new solid foundation.

Today we are stronger than ever.

We have grown our strength to 300,000 members and beyond. We have increased our power on Capitol Hill. And, we have deepened our solidarity with one another.

In addition to the National Leadership Meeting, the Committee for the Future also works together to move AFGE forward. The Committee for the Future represents a broad cross-section of AFGE leaders at all levels: small locals, large locals, Human Rights Committee, Y.O.U.N.G., Councils, and Districts. The primary purpose of the Committee is to execute the goals in the BEW strategic plan and evaluate the progress made toward the common goals set forth in the plan: membership growth, enhanced political power, a more educated and informed membership and leadership; and the effort to build stronger locals.



### GROW THE MEMBERSHIP

Strength in numbers means strength in bargaining and lobbying.



### BUILD OUR POWER

Legislative and political influence leads to better pay, benefits, and jobs.



### STRENGTHEN EVERY LOCAL

Big, informed, networked Locals can better organize, represent, and educate members.



### TRAIN & ENGAGE

Educated and networked membership boosts organizing and lobbying effectiveness.

## Key Functions of AFGE

**Organizing, representation, and legislative and political action** make up the key functions of AFGE. Although they are separate functions, they are interdependent in that success in one area often determines the success or failure of another. For example, organizing and recruiting new members is dependent upon our perceived strength in bargaining and legislative action. Likewise, our success in lobbying for higher pay for government employees or for demanding fair practices at the bargaining table is dependent upon our organizing strength and our ability to mobilize our members to support these activities.

Commitment to the major programs of the union only comes from an understanding of what the union is trying to achieve, what strategies we use, and how our success or failure will impact each and every worker and their family. It is important that members are aware of all ways that the union is fighting for them, both on a local level and together with the rest of AFGE.

We can only continue to accomplish AFGE's core functions if we have strong locals led by strong leaders. Local leaders and their members must understand why organizing, representation, and legislative action are important to AFGE as a whole, their local union, and to the lives of our members. Locals must commit to consistently working to recruit and retain members, represent members well, educate members on the issues we face, and fight for the rights of federal workers in local and national political arenas.

## Building Strong Locals

While Big Enough to Win is AFGE's national overall strategic plan, each local should be developing their own yearly strategic plan as well. Strategic planning is the process of defining goals and coming up with strategies to achieve those goals, including the allocation of resources. Strategic planning gives your work a sense of direction and a united, driving vision for officers and members.

Every local officer has his or her own specific Constitutional duties. But the Executive Board has the collective responsibility to provide guidance and direction for the local. To effectively carry out this task, the Executive Board must make strategic planning an essential part of its leadership role. The benefits of strategic planning are numerous: a local can improve the way its resources (time, money, etc.) are used; issues can be addressed in a timely, consistent, and systematic fashion; and local leaders can educate and involve the membership in the achievement of the local's goals.

Involving local members in discussions around strategic planning and budgeting increases buy-in and understanding of the local's actions. Allowing for member input also creates a common vision and united sense of purpose, as well as increased transparency. Strategic planning should also incorporate a communications strategy to keep members, councils and districts, and the National Office informed of the local's goals and planned actions to accomplish those goals.



## Building Strong Effective Locals

A strong local union is one that has the majority of the bargaining unit as active members, and a majority of the members engaged in workplace actions. Through strong locals, we can continue to grow our membership, building our legislative and political power to promote the best interests of federal workers nationwide. AFGE defines a strong as effective local as a local that:

### 1. Has Strong Leaders

Leaders who are well-trained, who are Political Action Committee (PAC) contributors, and who are inclusive and representative of the bargaining units in all its diversity. Union leaders include:

- Elected Officers
- Stewards
- Women's and Fair Practices Coordinators
- YOUNG Coordinators
- Activists and volunteers

### 2. Has Active Membership

The local has a minimum of 50% of the bargaining unit employees as members, has organizing and retention plans in place and has a significant number of members who are active and involved in union activities. The local also has:

- A minimum of 2% of members contributing to PAC
- An annual increase of 0.5%
- A goal of at least 10% PAC contributors by 2018

### 3. Represents its Members Well

The local represents its members well through a collective bargaining agreement and third parties such as the Federal Labor Relations Authority and the Merit Systems Protection Board. The bargaining agreement is:

- Bargained in a timely manner
- Enforced by the local
- Understood by members (through training)

### 4. Meets its Financial Responsibility

The local has an adequate dues structure with sound financial reporting and practices. This means that the



local:

- Has sufficient funds to cover the per capita, participate in LAF, and carry out their objectives
- Submits all necessary financial reports, forms, and audits

### 5. Participates in our Activities

The local engages in mobilization activities, lobbying, and political action. The local also participates in:

- Trainings
- Meetings at all levels (District, National, and Council)
- State federations and local central labor councils
- Local community activities

### 6. Communicates and Educates

The local communicates and educates to and from its members. The local communicates with:

- All bargaining unit employees
- Allies
- The community
- AFGE National

Look for this symbol throughout this guide, as we reference these six aspects of an effective local:



*\*Strong Effective Locals*

As a union, we are only as strong as our weakest link. Every local's strength contributes to our power at the District and National level, and assures that we are powerful enough to accomplish our important work.

## Sample Goals and Activities for Local Strategic Planning:

### Goal: Increasing membership by 20% with year-round organizing

- Action: Hold Lunch and Learns two times per month around key legislative issues such as proposed hiring freezes, pay cuts, or a local representation issue. All issues should be relevant.
- Budget: Add an Organizing Budget line item which can be used for organizing giveaways, food, flyers, and local rebates (if applicable).
- Assign a local officer or steward to work with the National Organizers and District representatives in developing a local Organizing Committee.
- Assign local Vice-President to develop schedule, obtain rooms, line up food and develop for presentations.
- Assign specific individuals from the union to attend the Lunch and Learns and to perform specific tasks such as set up, clean up, and pick up the food.
- Petition for new units (if applicable).

### Goal: Invest in Training

- Action: Send more local members to AFGE

sponsored trainings

- Action: Budget money for training
- 

### Goal: Building the Locals Legislative and Political Action Program

- Action: Appoint a Legislative/Political Coordinator (LPC) for the local
- Action: Local adopts goal of 10% of all members contributing to PAC
- Action: All local officers and stewards – when not on duty time or government property – will be asked to join the PAC
- Action: Hold at least two off-site events to recruit new PAC contributors

### Goal: Strengthen Our Local Union

- Action: Develop an annual action plan
- Action: Affiliate with our Central Labor Council
- Assign: An individual to be our delegate to and contact for the Central Labor Council

## Advice for Union Leaders:

1. Be visible in the work place.
2. Get close to the members and stay close to the members.
3. Tell members it's their union and then behave that way.
4. Don't be afraid to ask members to get involved.
5. The union is not an insurance policy on which members make claims—it is the collective effort of members to improve the quality of their lives.
6. Communicate excitement, energy, and confidence.
7. Let workers know that by working together, we can win.
8. Say less and listen more.
9. If you don't know the answer, don't pretend to.
10. Speak from the heart.



## Case Study: Local 1410

In September 2013, Local 1410 was not what you'd call a powerhouse. It had just formed from the partial merger of three Defense Health Agency locals from the shuttered Walter Reed Army Medical Center. Only 327 bargaining unit members (just 10 percent) had joined AFGE. Workers were divided geographically and across job classifications, and new leaders weren't even sure what issues affected workers at different facilities.

So when Local 1410 activists set the goal of reaching 1,000 members by the end of 2014 (a jump to 30 percent density), they weren't without their skeptics.

Local 1410, AFGE District 14 and AFGE national organizers rolled up their sleeves and came up with a plan to win. It included community outreach, member education and organizing events scheduled a year out. They used employee rosters to identify concentrations of non-members and target events for those areas. Emails and vocal members helped spread the word.

The local hit 1,000 members before the end of 2014. Their efforts have already built solidarity and helped identify key issues for upcoming contract negotiations.

### Chapter Review Questions:

1. What are the primary goals of Big Enough to Win?
2. Describe what a "strong and effective local" looks like.
3. Why is strategic planning important: at the local level? at the National level?

## Chapter 3: Fiduciary Responsibilities of Local Officers



# Fiduciary Responsibilities of Local Officers

## Learning Objectives:

- Define the term “fiduciary” and understand how it applies to local officers
- Identify when a local audit must take place
- Identify possible consequences for violation of fiduciary responsibility

## Fiduciary Responsibilities Under the Law

A “fiduciary responsibility” is the legal obligation to act solely in another party’s interest. As a local union officer, that means that you are acting in the best interests of your local union and AFGE at all times. A local officer’s fiduciary responsibilities require him/her to hold assets of the local in trust, to see that the local’s money is spent only for a proper purpose, and to account for all expenditures of the local’s assets. It is important to note that all officers are held accountable, not just the Treasurer. Local presidents and other officers must know what is required of them and act accordingly.

The fiduciary responsibilities of local officers are governed by:

- The Civil Service Reform Act (CSRA)
- The LMRDA (Labor-Management Reporting and Disclosure Act)
- The AFGE Constitution
- Local bylaws
- Union and local operating practices

### Civil Service Reform Act (CSRA)

The Civil Service Reform Act (CSRA) establishes standards of fiduciary conduct for labor organizations representing government. The CSRA mandates that local officers:

- Hold Union money and property solely for the benefit of the union and its members.
- Manage, invest, and disburse Union funds and

property only as authorized by The Union’s Constitution and Bylaws or by adopted resolution.

- Refrain from any financial or personal interests which conflict with those of the union.
- Account to the Union (or pay over to the Union) any profits received as a result of transactions conducted on behalf of the organization.

### LMRDA

The Labor-Management Reporting and Disclosure Act (LMRDA) provides that “officers, agents, shop stewards, and the other representatives of a labor organization,” occupy positions of trust in relation to the union and its members. Under the LMRDA, local officers are required to:

- Hold the union’s money and property solely for the benefit of the union and its members. The operative maxim for every union officer should be “It’s not my money.”
- Manage, invest, and expand the union’s money in accordance with the union’s Constitution and Bylaws and resolutions adopted pursuant to them.
- Refrain from dealing with the union as an adverse party. The actions of a union officer must be consistent with the interests of the union.
- Refrain from acquiring any financial or personal interest in conflict with that of the union. No officer or employee may receive anything of value from an employer or agent with whom the union has a collective bargaining relationship.



- Account to the union for any profit received by him/her in connection with transactions conducted by him/her on behalf of the union. The provision does not prohibit union officers from receiving such monies, only that they be reported to the union.

### The AFGE Constitution

In addition to the duties set forth by the CSRA and the LMRDA, a local officer's fiduciary responsibilities are further defined by the AFGE Constitution in Appendix B, "AFGE Standard Local Constitution. These requirements apply to independent locals chartered after 1985.

- Article IV, Sec 1 of Appendix B covers the obligation of local unions to set a dues structure.
- Article V, Sec. 2 authorizes that each check issued by the local union be signed by the Secretary-Treasurer and co-signed by the Local President.
- Article V, Sec. 3 requires that local officers, stewards, agents, or employees of the local who handle the local's money or property be bonded.
- Article V, Sec. 4 requires that each member local file an annual audit report with AFGE's NST's office.
- Article V, Sec. 5 requires that all books, reports and financial accounts of the local union be open at all times for inspection by AFGE National Officers or accredited representative of the National Executive Council and any duly authorized and accredited representative of the local.

### Union and Local Operating Practices

Local bylaws generally set forth additional duties of local officers; however, no local union bylaws may be in conflict with AFGE's standard Local Constitution. In addition to local bylaws, AFGE has established certain operating practices concerning the financial administration of the local. For example, it is AFGE policy for local unions to retain bank statements, IRS forms and Department of Labor forms, checkbooks,



cancelled checks, cash disbursements and all supporting financial documents for a period of up to five years. Records such as local union meeting minutes, the local's charter, its Constitution and Bylaws, are kept indefinitely.

Many times with the election of new officers, financial and other important legal records of the local may be lost. To avoid this loss, and to ensure safe keeping of local records, it is AFGE operating policy for locals to provide a copy of important IRS and DOL records for safe keeping and future reference.

### Breach of Fiduciary Responsibility

The consequences for a local officer's breach of his/her fiduciary responsibility can be severe. An officer may be held personally liable for losses sustained by the local or union as a result of violating their of fiduciary duties.

Moreover, the LMRDA provides that an officer who embezzles, steals or otherwise converts local funds or assets to his/her own use may be fined up to \$10,000 and/or imprisoned for up to five years.

## Annual Local Audit

The AFGE National Constitution requires every local to conduct an annual audit of its fiscal records (Article XIX, Sec. 5). An audit is an official review of the local's financial transactions.

The local's financial records should be made available to each of the Committee members. Upon concluding their work, the Committee should make a report to the local. Some locals publish an annual financial summary for distribution to the membership.

### Critical steps to conduct a local audit include:

- Confirming the addresses, account numbers, signatures, and balances of the local's financial accounts.
- Documenting and reporting on a timely basis the local's authorized expenditures.
- Reconciling monthly bank statements.
- Determining the local's other outstanding financial obligations (i.e., attorney and/or arbitration fees, fines, judgments, vendors, etc.).
- Confirming that all required reports have been filed (i.e., LM Forms, and IRS Forms).
- Obtaining a current membership list from the National Office or AFGE Web Site, and comparing this list with the Government Agency's dues deduction listing.
- Verifying that the local dues structure is adequate to support the local.



## Meets Financial Responsibilities

By establishing transparent and wise financial rules and practices, your local is able to meet its financial responsibilities to members and to AFGE.

Adhering to your financial practices or bylaws also mitigates the possibility of loss, helps all members ensure that the local's money is being held appropriately, and assures that officers are meeting their fiduciary responsibilities.



## Leadership Tip: Red Flag Items

Pay special attention to the following red flag items that may indicate trouble for the local:

1. One signature checks
2. Pre-signed checks by only one officer
3. Checks written out of sequence
4. Checks written to cash
5. Checks written to individual officers
6. Advance payment of salary to local employees
7. Unbalanced checkbooks with no deposit records

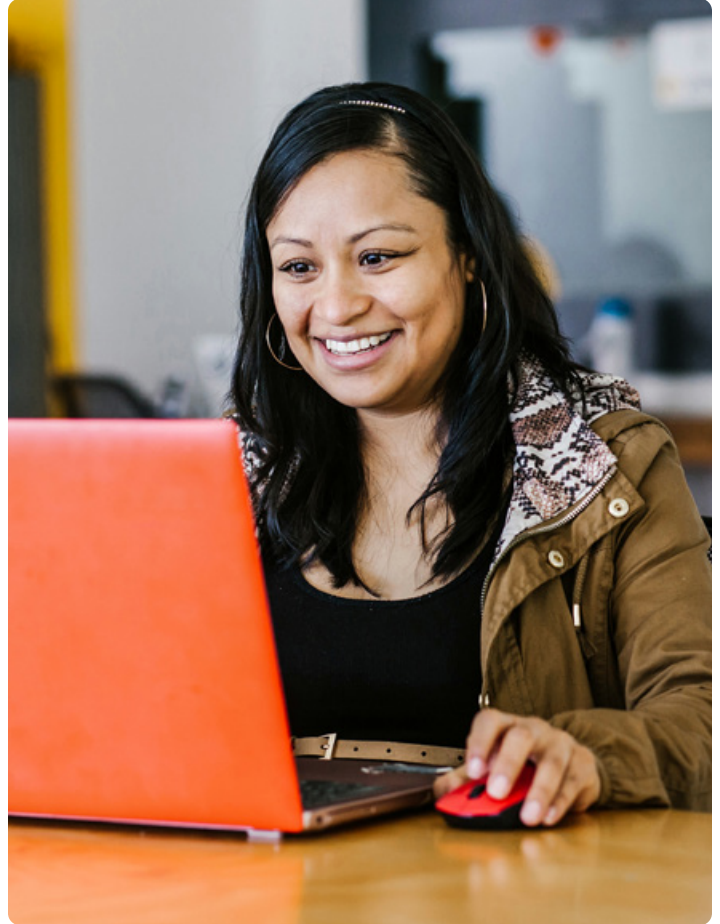
## Local Union Credit Cards and Loans - Beware!

Union provided credit cards and personal loans are the leading causes of locals getting into financial and legal difficulties. (According to the Department of Labor, a loan is any outstanding advances of the local union. AFGE strongly recommends that AFGE locals not make loans to members. Recovery of a defaulted loan is costly and difficult.

The likelihood of problems increases in proportion to the number of officers and/or Executive Board members given personal loans and access to local credit cards. A local union credit card can present an irresistible temptation for some, especially someone experiencing personal or family financial crises. The local can avoid many of these problems by establishing a policy whereby officers secure cards in their own name. The officer then submits the credit card charges associated with authorized union activity and the local reimburses the officer. Any additional expenses charged to the card, plus the payment of the credit card bill, remain the responsibility of the officer, not the local's obligation.

## Staying out of Credit Card and Personal Loan Trouble

- Put credit cards in the name of the individual officer, NOT the local.
- Define the use of credit cards for union business in the local's bylaws.
- Place a dollar limit on credit cards used by the local.
- Review credit card statements carefully.
- Verify that charges are actual local expenditures.
- Verify that these expenditures have been approved by the local.
- Adopt standard criteria for issuing loans.
- Have all local loans approved by the membership – NOT the Executive Board.
- Place a limit on loans – absolutely no more than \$2000 per officer or employee.
- For every credit card statement, ensure each charge has supporting documentation.



### Chapter Review Questions:

1. What does the term “fiduciary responsibility” mean for AFGE local officers?
2. How often must an audit of a local's finances must take place?
3. Name at least two financial red flag items you may come across as a local officer.
4. Who is ultimately responsible for ensuring that the local is following appropriate procedures and rules when it comes to the local's monies and finances?



## Chapter 4: Preparing a Local Budget



# Preparing a Local Budget

## Learning Objectives:

- Describe the connection between the local's strategic plan and the local's budget
- Describe common budget items likely to be included in every budget
- Understand the rules governing what local leadership can spend outside of the approved budget

All locals are responsible for preparing a yearly budget. The budget should be estimated in terms of realistic expenditures and developed so that these estimates do not exceed your revenue for the year. These numbers can often be estimated based on past expenditures and revenue. The local has no authority to spend money absent the approval of the membership, and the budget is the primary means of obtaining and documenting this approval as required by the Department of Labor (DOL).

## Budgeting and Your Strategic Plan

It's important that your budget reflects your local's goals and priorities, which should already be laid out in your strategic plan. If your priorities include

increasing membership, then sufficient funds should be budgeted towards Lunch and Learns and other organizing events, including money for food and other supplies, flyers, and local rebates (if applicable). If your priorities include investing in training for local leaders and members, then funds must be budgeted for training events, travel, and per diems.

## Approval by Membership

Once the budget is approved by the local membership, a copy should be forwarded to the District Office through your NR.

Outside of the approved budget, expenditures of local funds cannot be made without a vote of approval by the membership, unless stipulated in the local Constitution or bylaws, or within the approved budget. In accordance with the National Constitution, the local Executive Board is permitted to spend up to \$500 between membership meetings. This is meant to cover expenditures that are both necessary and unforeseen (thus not covered by the local's annual budget). All expenditures authorized by the Executive Board must be reported in writing at the next regular meeting of the local.

## Common Budget Items

Common budget items for locals will likely include:

- Training for local officers
- Training for stewards
- Participation in District, Council, and/or National meetings and events
- Administrative costs (including office rent, office supplies, payment of employees, etc.)
- Representational costs (e.g. for arbitration)



Training for local officers should be a standard item in all local budgets, since it is crucial that local leaders understand proper ways of managing the local in accordance with current laws and policies. It's very important that every local participate regularly in events at the District and National level. Funds must be designated for organizing activities and other local activities. There should also be a contingency fund for unexpected costs, such as rallies, AFL-CIO functions, unforeseen expenses, etc.

## Planning Ahead

District Caucuses and National Conventions take place every three years (not in the same year). The cost for attending these can be significant and thus 1/3 of the expected cost should be set aside each year, to ensure the local does not have to absorb all the cost in one year.

Please see the Appendix for a budget worksheet and a sample local budget.

## Dues

Remember that membership dues, per pay period, should equal the monthly per capita tax that you are charged for each member.

Monthly Per Capita Tax (effective 2016)		
	Insured	Uninsured
Members	\$21.96	\$20.91
Retirees	\$2.55	\$1.50

This allows the local sufficient funds to both remit the monthly per capita tax and to cover operating costs in order to serve its members appropriately. A carefully prepared budget may reveal a projected deficit, in which case you will likely need to raise dues.



## Meets Financial Responsibilities

One important aspect of being a financially responsible local is assuring that you have enough revenue to accomplish your goals and get your work done.

Since dues are the primary source of income for locals, you may find it necessary to raise dues from time to time. Members will undoubtedly protest, but it's your job as a local leader to clearly and thoroughly communicate why the raise is necessary and what it will help the union accomplish.



## Leadership Tip: Membership Approval

You need not only official membership approval of the budget, but also membership commitment to the local's spending priorities.

This is why it's important to involve many active members in the strategic planning process, and communicate with members regarding what your local ought to focus on. Involving the E-board, committee members, and a member representative as you define your local's path to achievement verifies that your goals are informed by the membership, affirming local ownership of your strategic plan and the corresponding budget.

### Chapter Review Questions:

1. Why is it important to develop a strategic plan for your local before you create the budget for the year?
2. List items that are likely to be included in your budget every year.
3. How much is the E-board permitted to spend outside of the approved budget, between local meetings?
4. How can you communicate your budget, and the reasoning behind it, to your members?



# Chapter 5: Local President Duties & Responsibilities



# Local President Duties & Responsibilities

## Learning Objectives:

- Describe the general duties of a Local President
- List various time management and delegation techniques
- Describe various skills and qualities required of a Local President

The Local Union President is ultimately responsible for the conduct of all local business. Under the AFGE Constitution, the general duties of the Local Union President are outlined in **Article XX, Sec. 1 and Sec. 2:**

**Section 1.** “The Local Presidents shall exercise general supervision over the affairs of their respective locals.”

**Section 2.** “The Local President shall comply with the National and local Constitution. Further, the Local President shall keep the membership apprised of the goals and objectives of the Federation.”

The Local Union Presidents’ duties are further delineated in **Article VI, Sec. 3 of Appendix B, Standard Local Constitution.**

These responsibilities include:

- Leading the local. Planning and chairing membership meetings and Executive Board meetings.
- Setting specific goals for the year with input from other officers.
- Approving a budget, in consultation with other officers, which supports and reflects specific goals for the year. Approving expenditures.
- Encouraging and developing new leadership within the local.
- Operating as a member of a team as well as leading that team. Sharing information with other officers (e.g., mailings from AFGE National Office).
- Assuming direct responsibility for recruitment

and external organizing.

- Making worksite visits. Getting members involved in the union through mobilization.
- Providing a communication link between the members and the National Office.
- Executing all local programs as established by the membership.
- Representing the local to the employer, community leaders, and the media.
- Having working knowledge of the local’s collective bargaining agreement(s).
- Supervising collective bargaining as needed.
- Supervising all grievances.



## Leadership Tip: Union Leadership Essentials

Maintain high standards of honesty and integrity.

Treat everyone with respect and dignity.

Recognize and respond to the needs of the membership; be available to members and other officers.

Communicate and educate.

Build solidarity and pride in the union.

Encourage ALL members to be involved in union activities.

Maintain a positive, “can-do” attitude.

Delegate tasks, responsibility, and authority.

Be a good listener.

Insist on excellence, for yourself and for others; develop yourself to your highest potential.

## Keeping Your Fellow Officers Up-to-Date on AFGE News

An often heard complaint from Executive Board members in AFGE locals is. “She (or he) doesn’t share information.”

The National Office sends frequent mailings to the local President. These include both paper and electronic documents, such as updates to financial documents, notices of national events and conferences, and education materials. Most of this information should be shared with your fellow officers. You might post them in your union office, send via email, or mail copies to out of town officers.

All local officers and activists should also sign up for AFGE Action Network alerts through [www.afge.org](http://www.afge.org). Encourage your officers and members to also follow AFGE on Facebook at [www.facebook.com/afgeunion](https://www.facebook.com/afgeunion) to get updates on AFGE events and news and issues that affect federal workers.

Your most difficult task as Local President is juggling all of these responsibilities. If you are feeling overwhelmed, you probably need to delegate more. Try to avoid spending all your time “putting out fires.

It’s your responsibility as the Local Union President to keep your eyes on your long term goals for the Union (e.g., where do you want the local to be in 2-3 years?). Let other officers handle some of the details.



## Time Management

One of the greatest challenges of union leadership is managing our time to meet the expectations of our members, our fellow officers and stewards, and the high standards we often set for ourselves. Time management means making decisions about what gets done and what doesn’t get done within the time available. Time management also means making the most of the time we have by learning ways to get things done faster or more efficiently and cutting down on tasks that are “time wasters.”



## Participates in AFGE Activities

One of your duties as local president is making sure your local actively participates in your District and AFGE National activities, such as training conferences, Convention, and the National Leadership Meeting.

Participating in AFGE activities provides opportunities for training, networking, insight into the larger AFGE community, and also allows you to communicate the needs and priorities of your local. Lead by example by attending as many AFGE events as you can, and by encouraging other officers and active members to attend as well.

## Seven Techniques for Managing Your Time

- 1. Block out time and a place to work with no interruptions.** When you have work that requires quiet time, schedule that time just like you would schedule a meeting with someone. Avoid picking times when you get lots of calls or emergencies.
- 2. Train people who can help you save time in the future.** The office staff, stewards and other officers can help you most if you take the time to explain to them how you want things done. This is an “investment” of time that will save you more time in the long run.



### Leadership Tip: Time Savers

#### Paperwork

- Sort mail by importance.
- Handle each piece of paper once.
- File things where you can find them.
- Use forms and model letters.

#### Phones

- Use email or text messaging to cut down on “phone tag.”
- Shorten phone conversations.
- Group text messages can update all local officers at once.

#### Technology

- Learn how to effectively use tools such as Outlook and its calendar to organize your email and track your schedule.
- Use online tools to share information to a broader audience. Google Docs is a great way to share and edit documents; social media can make event planning and communication easier.

#### Miscellaneous

- Use waiting time productively.
- Shorten other people’s visits to your office.

- 3. Schedule the best times to do different tasks.** Learn your own work patterns and use them to your advantage (e.g., deal with complicated matters when you are most alert).
- 4. Deal with problems at the source.** If you have problems that keep reoccurring, look for the source of your most time-consuming problems and see if you can devise a strategy that will cut down on the flow of problems.
- 5. Start big tasks with small tasks you can do now.** With big tasks, we tend to wait until we have a big block of time before starting them— so they often get pushed back. Break the project down into tasks and identify those tasks which you can do in a short amount of time.
- 6. Recognize when you are not productive.** There are times, usually late in the evening, where you find yourself struggling to get work done. At those times, it’s better to go home and get some rest so you can be more productive tomorrow. Recognize that you are human and that no one manages time perfectly.
- 7. Learn to say no.** All day long people ask for our time. Some of these interruptions are important to deal with immediately, but with many of them, we can learn to say no, and offer other alternatives.

### Using Goals and Lists

Managing your time effectively begins with identifying your work goals then developing a “to-do” list of the tasks you must complete to reach your goals. Having a “to-do” list allows you to look at everything you need to do, before deciding which task should be done first. Many leaders find they end up with three lists – (1) a set of goals, (2) a master “to-do” list, and (3) a daily “to-do” list.

The key to good time management is deciding which goals and tasks are the most important to do. This requires making some difficult choices.

However, if you instead use your time based on who walks into your office first, or who yells the loudest, you will not be effective.

## Prioritizing Tasks

An important step in time management is looking at the list of tasks you've created and prioritizing what items should get done first. One method of prioritizing tasks (referred to as both the Eisenhower Method and Covey's Time Management Matrix) is to divide them into four categories based on importance and urgency:

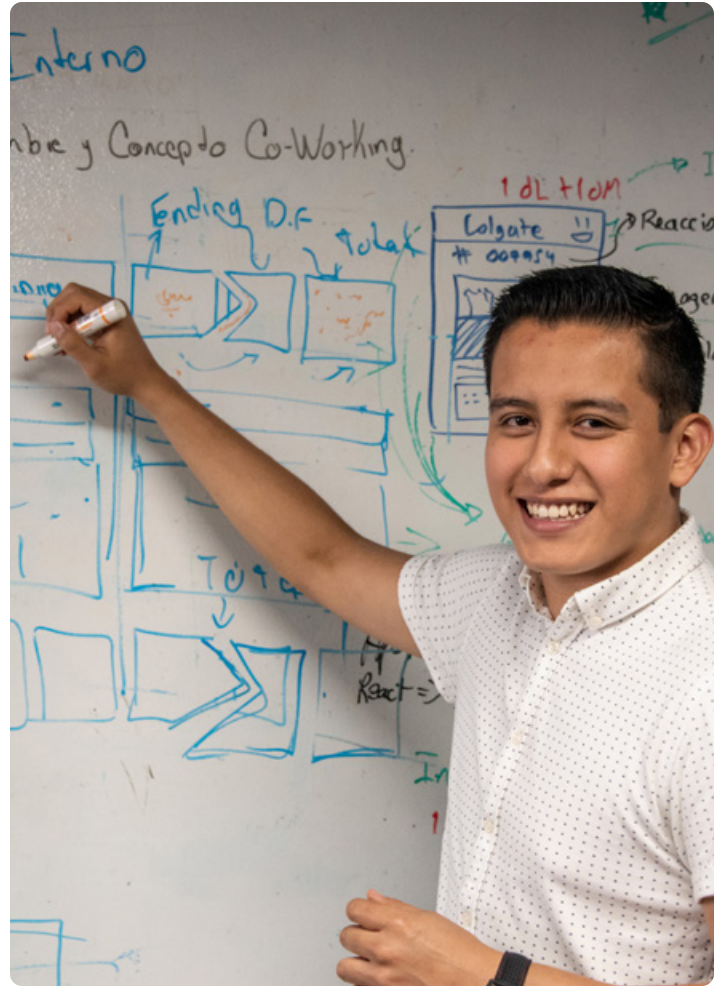
	Urgent	Not Urgent
Important	<b>1</b> Important and Urgent	<b>2</b> Important But Not Urgent
Not Important	<b>3</b> Not Important But Urgent	<b>4</b> Not Important and Not Urgent

As you make these decisions, always keep in mind that the next step is to actually spend your time on the highest priority tasks.

## Sticking to the Highest Priority Tasks

Making lists and setting priorities is a waste of time unless you do the high priorities first. Every time you find yourself doing something that is not on your list or doing low priority tasks, ask, "Is what I'm doing now more important than the high priority tasks on my list?"

This is often called the "80-20" rule of time management. Union leaders should be spending 80% of their time doing what is most important (building the union) and 20% on those tasks that are less important.



## Leadership Tip: Delegating Tasks

1. Choose a member who is capable of performing the task, a person who has the right amount of knowledge, experience, and eagerness to handle the assignment.
2. Explain the objectives of the assignment, including the purpose of the job, the results expected, the role and authority being delegated, and any timetables involved.
3. Provide the member the resources and authority needed to carry out the assignment.
4. Keep in contact with the member—to monitor progress, evaluate results, establish accountability, and give the member a way to provide information and feedback.
5. Give credit and praise for a "job well-done."



## Leadership Tip: Taking the Union to the Members

“I’ve tried everything but the members never show up for our meetings. They just don’t care.”

If members don’t come to the union, take the union to the members. Set up a mobilization structure for membership involvement. Through this structure you can reach each member one- on-one.

AFGE belongs to the members – we cannot be effective if only a few workers are actively involved.

Remember, if the members don’t come to the union, then take the union to the members in the workplace.

### Delegating

You cannot do everything that needs to get done for the local yourself, and if you try you’ll likely burn out quickly. Instead, try to delegate as many tasks as you can. This gives you more time to focus on President duties, and also helps involve other members in the regular work of the local. When listing and prioritizing tasks, think about which ones can be delegated to another local leader or to an active member. The more you’re able to delegate, the more time you have to work towards the overall strategic plan, and the more you’re able to get other members involved in the important work of your local. As you delegate tasks and members build their skills and knowledge, they will be able to take on more and more important tasks. Aside from giving you more time to focus on the really important things, delegating gets more members actively involved in conducting union business and builds a crew of future local leaders.

### Focusing on Results.

Focus on the results of what you get done, not just how many things you cross of your to-do list or how much time you spend on one task. Look at what you are accomplishing for the members and whether you are advancing your goals.



## Has Strong Leaders

Being a strong local leader isn’t just about being decisive, charismatic, and inspiring followers. It’s also how you step back to allow other local leaders to emerge and take charge of the important work of the union.

- How, as President, are you encouraging other leaders and members to lead the work of the local?
- How can you make sure all members of the bargaining unit feel included, represented, and encouraged to take on more active positions?
- How are you encouraging new and young members to take on roles that allow them to develop their leadership skills?
- How are you preparing a new generation of union activists to take over once you’re ready to retire or step down?

## Chapter Review Questions:

1. What is one of the most difficult aspects of being a Local President?
2. Name at least two time management techniques a Local President can utilize.
3. For each of the important/urgent quadrants, name at least one Local President task that falls under each category:
  - important and urgent
  - important but not urgent
  - not important but urgent
  - not important and not urgent
4. Why is delegating so important for Local Presidents and officers?
5. What do you think is the most important quality for a Local President to develop?





# Chapter 6: Local Treasurer Duties & Responsibilities



# Local Treasurer Duties & Responsibilities

## Learning Objectives:

- Describe the general duties of a Local Treasurer
- Understand the rules for expense reimbursements
- List the various reports that must be filed by the Local Treasurer

Protecting the funds and assets of the local is the fundamental job of the local Treasurer.

Appendix B of the Local Standard Constitution of the AFGC Constitution, Article VI, Sec. 5, describes the Local Treasurer's duties:

"shall be to maintain a bookkeeping system as prescribed by the National Secretary-Treasurer; make a financial report at each regular meeting; keep an up-to-date roll of the members; receive all monies and/or dues paid into the local and receipt thereof; keep records of all transactions; deposit money in the bank to the credit of the local; make regular monthly reports to the NST, which includes furnishing names and addresses of all new members...; forward per capita tax to the National Headquarters in accordance with the requirements of the AFGC National Constitution."

The Local Union Treasurer's job duties include the following:

- Prepare the local's budget in consultation with E-Board for approval by membership;
- Maintain financial records;
- Maintain membership roster;
- Report on finances to the local;
- Meet Department of Labor and IRS reporting requirements;
- Arrange for the annual audit;
- Maintain adequate bond coverage;
- Manage the local's assets and invest local funds consistent with sound accounting practices and local policies (in conjunction with the Local President and E-board).

## Handling Expenditures

All union expenditures must be authorized, documented, explained, and reported.

### Authorized

Because of the fiduciary nature of your position as Treasurer, the need for authorization for disbursements is greater than in a commercial enterprise. Authorization may take the form of allowances set forth in bylaws, an approved budget, a motion passed at a membership meeting, or Executive Board action.

### Documented

Disbursements must have supporting documents such as receipts, bills, etc. If there is no documentation for the expense, reimbursements are not to be made without proper explanation.

### Explained

An explanation of the activity which caused the expense should be included on all expenditures.

### Reported

Expenditures made that are not included in an approved budget or were not previously approved by the membership must be reported at membership meetings. The E-Board has the authority to spend up to \$500.00 each month without membership approval; expenditures over \$500, outside of the approved budget, should not be made. These expenses should also be reported in writing at the next scheduled membership meeting.



## Leadership Tip: Getting Started as the Local Treasurer

When you begin your term as Treasurer, take the time to work through all the documents and requirements involved in doing your job. AFGE's National Secretary-Treasurer's Office holds Local Secretary-Treasurer training throughout the year in order to help new treasurers be effective in their work. If you have any questions about the following items, ask your Local President or your AFGE National Representative.

1. Review AFGE Constitutional requirements for Treasurer. (See Appendix B, Standard Local Constitution, Articles VI, Section 4.)
2. Review bonding requirements. Make sure all local officers who handle union funds are properly bonded. This is an AFGE Constitutional requirement.
3. Review local budgets from previous years. Calculate what percentage of total dues income was spent on each line item last year. This will help you assess where the money is being spent and may identify areas that need to be examined by the Executive Board.
4. Review previous financial reports to members. Make a special effort to see that financial reports are easy to understand and that they reach all the membership, not just those who come to meetings. When members know where the money goes they are more likely to support the union and its programs. Determine how long you must keep financial records and the best way to keep them filed and organized.
5. Review bank accounts. Bank accounts should be in the name of the local. The Local Bylaws should require that two officers sign all checks — this is also a recommendation of the U.S. DOL and most auditors.
6. Review the local's procedures and policies for payment of bills and expenses. Local union funds should be disbursed only by check. The only exception is a petty cash account. When a payment is issued, the invoice or statement should be marked paid, dated and the check number noted.
7. Review the Per Capita Tax Report from the AFGE National Office and make sure you understand what all the information means. Note trends, increases/decreases in members or non-members in certain locations, bargaining units, etc.
8. Review federal forms and report requirements including LM forms, Form 990's and applicable federal, state, and city taxes paid in previous years.
9. Review the local's procedures for an annual audit. This is an AFGE constitutional requirement.

### Expense Vouchers

An expense voucher should be used by individuals to gain reimbursement for authorized personal expenses incurred in the course of union business.

Expenses should be turned in weekly with proper explanation of expenses, activities, and receipts which support reimbursements. If for some reason receipts are not obtainable, appropriate explanation should be entered on the vouchers.

Expenses to list on your voucher include:

**Meals and Hotels.** When away on union business, the individual should follow the local's policy regarding the class (room rate range) of hotel.

**Transportation.** When traveling, officers and representatives of the union are required to use the classes of travel designated by the local's policy. All

travel and travel expenses should have prior approval and actual receipts should be submitted to the local with an explanation.

**Personal Car/Mileage.** In the event that personal cars are used in the conduct of union business, the mileage rate established by the local (not to exceed the current IRS allowance per mile) will be reimbursed to the individual.

**Telephone and Cell Phone.** Expense of local and long distance calls charged on the hotel bill for official union business when properly submitted will be paid according to local policy.

**Wages.** Wages should be reimbursed weekly for lost time while on union business; wage reimbursements should be filed on a separate form from other expenses.

**Other.** Any expenses that do not fit the headings above and are incurred during the course of union business must be authorized and explained. Proper documentation must exist before reimbursement is made. The Treasurer should not make payment unless it is properly authorized.



## Leadership Tip: Official Time and Double Dipping

Under the Federal Labor Relations Act, union officers may use “official time” to “prepare and maintain records and reports required of the union by Federal agencies; and to maintain financial records and books required to complete IRS reports. (38 FLRA No. 107).

As a matter of course, AFGE negotiates “official time” for members and officers conducting union business so that the local union can stretch out its financial resources. We advise against the practice of paying additional lost time wages (out of local dues money) for lost time which is paid by the employer. In some instances, it is against the law.

## Financial Reports

Article VI, Section 5 of Appendix B of the AFGE Constitution requires locals to make financial reports to their local membership at each regular meeting and monthly reports to the National Office. In addition, Article V, Section 5, requires that:

“All books, records and financial accounts at all times shall be open to the inspection of the national officers or accredited representative of the National Executive Council and any duly authorized and accredited representative of the local.”

## Financial Report to the Membership

AFGE members should be encouraged to know as much as possible about the finances of their union. Sharing this information about the finances and spending of your local helps to educate members on local priorities and work, and builds confidence in the transparency of union leadership.

## Per Capita Tax Payment (PCT)

The PCT payments should be sent to the AFGE headquarters address in Washington, DC, ATTN: FIS Department or to the AFGE lockbox at P.O. Box

758819 Baltimore, MD 21275-8819.

Other payment options include online through MyLocal3 or the tape process (if you are a tape process local).

### LM-Report

The Labor-Management Reporting and Disclosure Act (LMRDA) requires that all local units file annual financial disclosure reports. Locals with an annual income of \$250,000 or more are required to complete Form LM-2. Locals with total receipts under \$250,000 but more than \$10,000 must file Form LM-3; those locals with total receipts under \$10,000 Form LM-4. The form must be filed no later than 90 days after the close of the local's fiscal year.

Prior to filing the LM report, you must have filed an LM-1A report which establishes your local with the Labor Department and provides you with a Labor Management Standards Administration (LMSA) file number.

## What is an EIN?

Every AFGE local is required by law to have its own Employer Identification Number (EIN). Your EIN is the key to the electronic computer data files the IRS maintains. You also need an EIN number to open a bank account.

Your local probably has an EIN. If it doesn't, you must file IRS Form SS-4, available on the IRS website at [irs.gov](http://irs.gov). The office of the Secretary-Treasurer keeps a record of these numbers – if you are unable to locate your local's EIN, you may secure it by calling or writing the National Secretary-Treasurer's Office.

### Local Accounting System

**Cash Receipts Journal.** Deposits should be recorded in the Cash Receipt Journal indicating date received, from whom, or what purpose and the number of members for which per capita tax or dues is received. Deposit amounts and dates of deposit should be

recorded in the checkbook. Duplicate deposit slips and dues deduction listings should be retained.

**Cash Disbursements Journal.** Union money must have proper authorization for disbursement under requirements of law, Constitution and by-law, contractual obligation, vote of membership or Executive Board. All checks drawn on the union's account require two signatures, normally the President and Treasurer. As each check is written, the date, amount, payee, and purpose of the expenditure must be recorded on the check stub and in the Cash Disbursement Journal.

**General Ledger.** The general ledger is used to summarize the financial transactions of a local union by account number. This summarized information is then used to prepare financial statements, LM-2s, LM-3s, 990's and other reports.

### Bond Coverage

Bonding is insurance that protects the local from financial loss caused by acts of fraud or dishonesty. In compliance with the Civil Service Reform Act of 1978, the Labor Management Reporting and Disclosure Act of 1959, as amended, and the national AFGE Constitution, Article XIX, Section 6, all officers and employees of an affiliate who handle money must be bonded for at least ten percent of the local's assets. The AFGE's National Secretary-Treasurer's Office negotiates a blanket policy for all locals and councils each year and provides bond certificates for AFGE locals and Councils through the national's own bonding agent.



## AFGE Local Collection of Dues Program

Under this program, the government employer sends dues checks directly to the local union, who then remits Per Capita Tax (PCT) payment to AFGE National. Every month, AFGE National prepares the PCT billing statement. Local officers may review and/or download the PCT billing statement via MyLocal3 under the "Report, Finance Report" section. Local officers may also manage their membership via MyLocal3 under members section.

**What Does *Per Capita* Mean?** The National's portion of dues paid to AFGE is called per capita tax. Only convention delegates can decide our per capita tax rate structure. (See Article XIX of the AFGE Constitution).

**Local Union Per Capital Tax Statement.** The local's per capital tax (PCT) statement contains the PCT charge, payments received as well as membership changes that have taken place within the period covered for the statement. This report is generated monthly for each local by the National and is sent to the local for its review and records.

## Membership Database On The Web

Local Presidents and Treasurers can perform all membership transactions, such as adding new members, dropping members, and making



## Leadership Tip: Membership Roster

Why is it so important for local officers to maintain an accurate membership roster?

- AFGE per capita tax is calculated on the number of active and retired members contained in each local's roster
- The voting strengths of AFGE's National Convention and District Caucuses are calculated on the number of members in each local's roster
- Mailings, such as the Government Standard, are mailed to members listed on the roster
- Membership cards are issued to members listed on the roster

membership corrections directly on line by going to the "MyLocal3" portion of the AFGE web page. It is no longer necessary to fill out and mail paper forms to perform these tasks. Not only are web submissions received from locals processed by AFGE's data processing section within 48 hours, but a 60-day history of all membership submissions is documented for the convenience of the local officer to sort the members by numerous categories such as member status, agency, council, congressional district, and PAC contributors, as well as the ability to print labels right from the site.



## Leadership Tip: Local Union Financial Reports

### Suggestions for making local union financial reports easier to understand:

- Hand out copies of the financial report at the membership meeting. Encourage questions. Remember: the members don't know as much as you do about how and why the local spends its money.
- Print financial reports in the local newsletter and/or distribute it at work sites.
- Go over the report with stewards so they are able to answer members' questions.
- Make the report easy to understand. Use pie charts and simple language. (e.g., don't say "assets," say what your local is worth.)
- Explain all items. Don't just say "lost time," say "lost time" for stewards and officers on grievances."
- In your report, anticipate members' questions; answer them carefully and fully.

Local officers are responsible for creating and maintaining accurate membership information, including members' addresses, personal emails, personal and work phone numbers, and cell phone numbers with permission to receive texts and robo calls regarding important AFGE issues.

### Other features of “MyLocal3”

The Local President and Local Treasurer also have access to the local's profiles customer ledger, last 12-months of billing statements and, if the local is a tape process local, 12 months of customer packages. Officers who need assistance in navigating the above sites are welcome to contact the National Secretary-Treasurer's Office at 202-639-6438.



## Communicates and Educates

Communicating the local's financial plan, budget, and the reasoning behind expenditures is an important part of the Treasurer's job.

By communicating this information to your members, you're also educating them on your local's priorities and accounting for what is being spent and why. This in turn leads to more buy-in among members as they understand the goals of what the union is working towards.

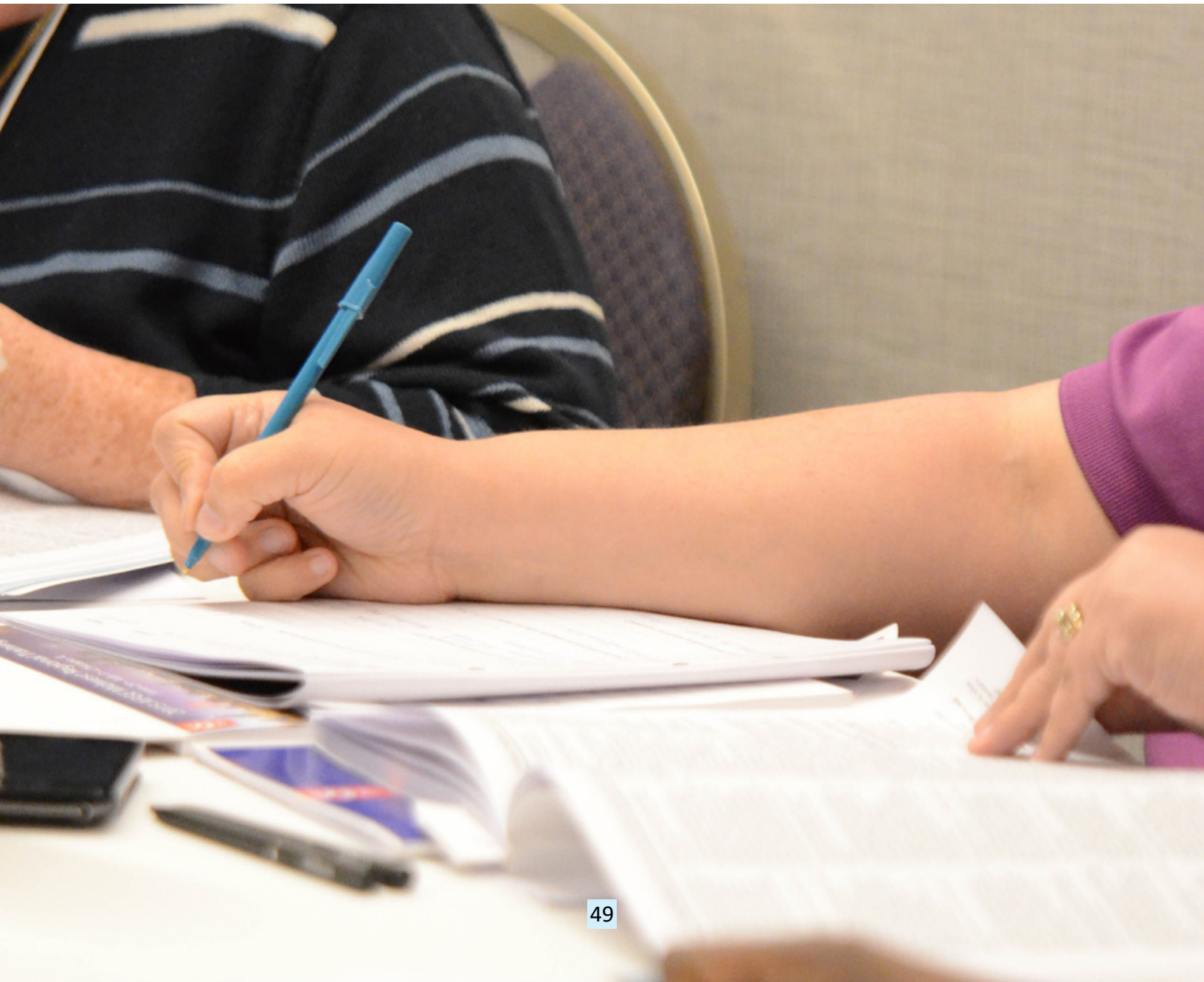
### Chapter Review Questions:

1. What are the most essential duties of a Local Union Treasurer?
2. What kinds of expenses are eligible for reimbursement? What kinds of expenses are NOT eligible for reimbursement?
3. Name three financial reports the treasurer must file.
4. For your local, what is the best method(s) of keeping members informed of the finances, expenditures, and assets of their local?





# Chapter 7: Local Secretary Duties & Responsibilities



# Local Secretary Duties & Responsibilities

## Learning Objectives:

- Describe the general duties of a Local Secretary
- Understand what must be included in meeting minutes
- Describe various ways to file, store, organize, and share important local documents

The Local Union Secretary serves as the formal communications link between the members and the President of the local union. Under the AFGE National Constitution, Appendix B, Article VI, Section 6, the duties of the Local Union Secretary are to:

“keep a complete record of the minutes of all meetings; maintain all election related documents...; keep up-to-date the official copy of the bylaws of the local; conduct correspondence when directed by the President; and send out notices of meetings when required.”

In addition to performing the duties spelled out in the AFGE National Constitution and the Local Bylaws, the day-to-day duties of the local union Secretary are to:

- Maintain a current record of local membership.
- Record minutes of all local meetings.
- Maintain files and handle official correspondence.
- Inform President of changes in National and/or District procedures.
- Remind President of items for agendas of meetings.
- Cooperate with other officers in furnishing proper reports to government.
- Work as a member of the local officers’ team.
- Make worksite visits and share responsibility for organizing and recruitment.



## Communicates and Educates

Not all your members are going to show up at every meeting or every event. That’s why it’s so important to have a system in place that allows all members to know what’s going on with your local.

How can you share notice of events, meeting minutes, and important information about what your local is fighting for (for example, during contract negotiations)?

Email, the website, or other electronic means might be one of the best ways.

## Meeting Minutes: The Official Record of Union Business

Minutes are the official, permanent record of the activities and official actions of the local. As the official recorder of local union business, the Secretary is required to include in all meeting minutes any motion or action that commits the local to a particular policy or action, authorizes local spending, and approves members' actions and amendments to the local bylaws. Minutes must be signed by the Secretary and approved by the membership – they are normally read and approved at the next meeting.

Minutes should be retained indefinitely in the local's files since they may be necessary to substantiate local actions at some future date.

In union elections, the Secretary is the primary recorder and archivist of the results of local union elections, as well as any committee recommendations that are made.



### Leadership Tip: Writing Minutes

After a little practice, most Secretaries find taking minutes fairly easy.

- Take notes during the meeting. Have a copy of the agenda in front of you as a guide.
- Rewrite or type your notes into minutes as soon as possible. If you are not sure how it sounds, read it aloud to yourself. Be concise but exact in your wording.
- Copy the minutes into the “minute book.” The final copy of the minutes should be in ink (or typed) and kept in a bound book. Minutes for different kinds of meetings should be kept in different books.
- Do not include personal opinions or evaluations. Such phrases as “a brilliant idea,” “very heated discussion,” or “poorly received suggestion” do not belong in the minutes. The Secretary is a recorder of events, not an interpreter of sentiment.
- If a correction is made in the minutes at the next meeting, the Secretary writes the correction at the end of the minutes and initials it.
- Minutes should be stored indefinitely and made available to members, if possible.

## Meeting Minutes Basics

In recording local union meetings, there are basic data that must be included as part of the official record including:

- Local, type of meeting, date, time, place, and the name of the Chair.
- Officers roll call with absentees noted.
- Action taken on minutes of last meeting.
- Brief committee, financial, and officers reports. Show action taken on reports.
- Correct wording of every motion and action voted on, and results of the voting.
- Name of individual making a motion.
- Time of adjournment.
- Secretary's signature.
- Approval of presiding officer.

## Sample Local Meeting Minutes: Minutes of Local 123 Meeting, March 23, 2017

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

1. Roll call of officers was taken by 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 March 5, 2017. It was moved by Jack Ely, seconded and carried that the report be accepted.
  - B. 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 Williams, seconded and carried that the report be accepted.
5. Committee Reports:
  - A. Organizing Committee. Chairperson Vu Nguyen 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 Darryl 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 Amanda Stewart 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.

## Local Filing System

A simple filing system is absolutely necessary for conducting the local business. Several types of files are needed including:

**Action Files.** These are kept by each local officer. All matters which require attention or action should be kept in these files until the problem is solved or appropriate action is taken. When a letter is opened, it should be directed to the attention of the right person. That individual should also have an action file to keep it in. In this way, no matters are overlooked.

**Follow-Up File.** Copies of letters mailed by the local which require a reply should be placed in a file for follow up action. This file should be a folder, indexed by number from 1 to 31, representing the days of the month. The copies should be placed under the appropriate date, usually ten days after the letter is mailed, to allow reasonable time for the recipient to answer. This file should be checked every day and a reminder letter sent if a reply is not received after a reasonable wait.

**Correspondence File.** The purpose of filing is to keep letters and records that the local may need in the future. It's not necessary to keep every piece of e-mail or paper correspondence, or every leaflet received. When in doubt, it is best to save it – then go through the files once a year and throw out all materials no longer in use.

**Grievance Files.** Every local should keep a file of written grievances. This file may be kept according to the date the grievance was written or by the subject

## Local Filing System

Experience has shown that a subject file system works best for most locals. This is a system in which letters are filed according to the subject discussed. For example, a letter on pensions is filed under “pensions.”

Some locals have purchased red folders and use them as action file folders. A red folder is easy to spot and keep track of on a busy desk.

Generally speaking, it is a good rule to keep all letters written by hand, or by e-mail. Official letters from AFGE should be kept and filed. These correspondence files are the property of the local. When a Secretary goes out of office, files should be turned over to the new Secretary immediately.

Your local might still be using mostly paper files, or mostly electronic files, or a combination of both. If relying primarily on electronic files of your important union documents, be sure sure it is backed up online or on paper, and make backing up your files a regular occurrence. You might choose to employ an online system to both store and share electronic files, such as Dropbox.com, Google Docs or something similar.

of the grievant (seniority, overtime, wage rates, safety, etc.).

A web-based grievance tracking system, “**CaseTrack**,” is available from the AFGE National Office; a CaseTrack training manual is available online at [www.afge.org/manuals](http://www.afge.org/manuals). (See the Grievance and Arbitration chapter for more information).

## Chapter Review Questions:

1. What are the most essential duties of a Local Union Secretary?
2. What must be included in meeting minutes?
3. For your local, what is the best method(s) of filing and organizing important union documents?



# Chapter 8:

## Local Governance Structure: Executive Board and Local Committees



# Local Governance Structure: Executive Board and Local Committees

## Learning Objectives:

- Describe the duties of the Local Executive Board (also known as the E-board)
- Describe the best practices for getting a local committee up and running
- Name several examples of types of committees common in AFGE locals

The Local Executive Board consists of all of the local's elected officials. The Executive Board works collaboratively with Stewards, Committees, staff, and their District, Council, and AFGE National.

The function of the Local Executive Board is to provide leadership and consensus on the local union's goals. Duties of the Local Executive Board, as identified in Article VIII, Appendix B of the AFGE Constitution, include the following:

- Prepare an annual budget that is reviewed and approved by the general membership and ensures that the local's finances are sufficient to support the activities it proposes.
- Act for the membership between local union meetings on urgent matters that cannot wait until the next union meeting, as well as routine matters that do not need membership actions. No action may be taken by the Local Executive Board that is inconsistent with the objectives of the AFGE. Any decisions made by the Executive Board is subject to the general membership's approval.

Other responsibilities of a Local Executive Board include:

- Making a strategic plan for the year with specific goals.
- Working as a team. Try to keep personal conflicts and politics out of your work on the Executive Board. Remember, it's your duty to do what's in the local's best interest and rise above personal differences.

- Hear reports of local officers and committees.
- Appointing and removing members of all committees subject to the right of the membership to approve.

## Local Union Committees

A functioning committee structure is essential to an activist local union. There are two types of committees: standing committees and special committees. **Standing committees** are more permanent in nature, whereas **special committees** come together for a temporary purpose.

In addition, Union locals often create committees that are responsible for working on union programs such as organizing, education, legislation, health and safety, and retirees.

## AFGE Local Union Election Committee

The AFGE Constitution requires that, for union elections, all AFGE locals create an Election Committee in their local. (See Appendix A, Part I, Section 2.) Under the law, a local officer cannot serve a term longer than three years. The Constitution requires an election committee "be constituted to conduct each election. The Committee shall consist of not less than three members, and if a larger Committee is required, it shall contain an odd number of members. Its members shall be selected, and it shall meet a reasonable time before the commencement of the nomination procedure."

Most locals elect an Election Committee a month or



so before the regularly scheduled elections. The local decides whether the Election Committee is standing or special. (See the “Running Union Elections” chapter for more information.)

### **Audit, Investigation, and Trial Committees**

There are three other committees that a local may constitute:

Article XIX, Section 5 of the National Constitution requires each local to conduct an audit. Most locals appoint or elect an Audit Committee. The local decides whether the Audit Committee is standing or special.

Article XXIII, Section 3 of the National Constitution requires that when a member files disciplinary charges, the Executive Board or Local President shall appoint a Committee of Investigation.

Article XXIII, Section 4 requires that when the Committee of Investigation prefers charges, the Executive Board either constitutes itself as the Trial Committee or the local membership elects a Trial Committee. Both the Committee of Investigation and the Trial Committee are considered “special” committees of the local.

## **Types of Local Committees**

**Organizing Committee.** The local Organizing Committee’s job is to coordinate all organizing work with the involvement of members, stewards, District staff, and National Organizers in both internal and new unit organizing. In addition, there should be an ongoing Lunch and Learn program for the purposes of recruiting new members through issue organizing, information dissemination, and retention activity.

**Education Committee.** This committee, along with local officers, is responsible for developing and carrying out the local’s educational programs including stewards training, new worker orientation, and labor in the schools. Interested and capable committee members should be developed as local trainers.

**Women’s and Fair Practices Committee.** This committee works to advance the human rights, civil rights, and workers’ rights of government employees through legislation, collective bargaining, and grassroots mobilization.

### **Legislative and Political Action Committee.**

This committee works to advance the interest of the union in the legislative field to make sure that every member is a registered voter, and to involve the members in campaigns to support pro-worker candidates and legislation.

**Community Services Committee.** This committee helps develop programs to involve the union in social service programs in the community and to join in coalitions with other organizations in support of worthwhile causes such as “Jobs with Justice”, local health and community programs, and voter education programs.

**Mobilization Committee.** This committee is



### **Leadership Tip: Bringing in New Committee Members**

The first committee meeting that someone attends forms a lasting impression. If someone feels welcome and a part of the group initially, he or she is more likely to become an active participant. If possible, a pre-meeting orientation by a committee member (probably the Chair) can be very valuable. (Ask the new member to come 15 minutes early to the meeting.)

During this orientation, the Chair should explain the role and responsibilities of the Committee, projects the Committee has successfully completed, and what the Committee is currently working on. The new member should be introduced individually to Committee members as they arrive. At the beginning of the meeting some references to the new member’s contribution should be shared. For example, the Chair can say, “I’m so glad you’ve joined the Committee. We really need someone who is familiar with clerical titles and job issues.” After the meeting, the Chair should check with the new member to answer any questions and to ask for his or her impressions.

responsible for developing an internal mobilization structure and carrying out mobilization activities around important workplace issues including collective bargaining, organizing, and grassroots political action.

**Health and Safety Committee.** This committee makes sure that the employer is complying with its legal responsibility to provide a place of employment which is free from recognized hazards likely to cause death or serious physical harm.

**Communications Committee.** This Committee gathers news, sets editorial policy, and produces the local's publications, website, and social media.

**Retirees Committee.** The committee's primary responsibility is to organize AFGE's Retirees program. Members of the Retirees Committee also represent the local in community services for elders and get involved in grassroots actions in support of retirees.

**Budget/Finance Committee.** This committee monitors the finances of the union and presents a budget to the Local Executive Board and members each year.

**AFGE Veterans.** brings together AFGE members who are military veterans to speak out on issues that impact veterans, especially the need for good jobs, benefits and a strong, fully funded and staffed VA.

Local Veterans Committees mobilize veterans around legislative and political campaigns, carry out annual events to recognize veteran members' achievements, and mentor and assist veterans as they transition to the federal civil service.

## Getting a Local Union Committee off the Ground

### Develop a Committee Description

Make sure the committee understands its job. Often a committee is set up and then fails to do anything. It is important to discuss not only what the job of the committee is, but why it is important, how it fits into the work of the local, and how it impacts the membership. A brief description of Committee responsibilities should be agreed to, and kept in the committee minutes binder as a handy reference to new committee members.

### Assign a Local Officer to Each Committee

If there are no officers on a committee, one should be assigned to assist and oversee the committee's activities. He or she should talk with the Chair frequently to find out what the committee is working



## Has Active Membership

One way to increase member involvement in the local is to get members actively involved in the important work of local union committees.

- Encourage members to participate in committees that appeal to their interests or skills and knowledge.
- If you know a particular member has a skill set that would be helpful to one of the local's committees. let him or her know why you think they'd be a good fit.
- As a local leader, work to make sure committee members feel valued, included, and that their contributions are important.



on, and what obstacles or difficulties they are encountering, and then assist the Chair in working through them.

### **Encourage, Motivate and Advise the Committee Chair**

It is important for local officers to talk frequently with committee chairs one-on-one. Ask him or her how the committee is doing. Ask if they are enjoying the work. If not, try to determine why - sometimes all the committee chair needs is to have someone listen and understand his or her frustrations.

### **Create an Information System for the Committee**

The local should have a notebook for each local committee. The committee secretary should bring it to each meeting. Once a year the notebook contents should be put in a file for future reference. The committee's notebook should include an explanation of the job of the committee and its role in the local.



## **Chapter Review Questions:**

1. What are the most essential duties of the Local Executive Board?
2. What kind of committees do most locals have? What are the most important committees at your local?
3. How can you get members involved in local committees, and how can you keep them involved?



# Chapter 9: Building a Stewards Structure



# Building a Stewards Structure

## Learning Objectives:

- Describe the importance of having a thorough, well-trained, and well-organized steward system
- Recognize what should be discussed among stewards, among stewards and their bargaining unit members, and among stewards and local officers

It is the responsibility of AFGE local officers to develop a local stewards system that trains, informs, and recognizes stewards. A well-developed steward system is a key feature of a strong local. The steward system ensures that all bargaining unit members are represented by a steward and that all members know who their steward is.

A general guideline for selecting stewards (in some locals they are elected) is to have a steward for every 20-30 workers. A steward structure can be set up by floor, by department, by shift or by any reasonable combination of these. The structure will depend on several factors including the number of workers in a bargaining unit, where the local is located (e.g. concentrated in a one building or spread out across a city or the country); and working hours (an 8 hour-a-day operation or one that operates 24 hours a day, 7 days a week.)



## Stewards: the Face of the Local Union

Stewards are the key people on your local union team. The steward is the one union person our members see every day when they go to work. In the eyes of most members, stewards are the union. Stewards take on a number of roles in the workspace – reaching out to new members, settling grievances, generating member awareness and support on issues, educating and mobilizing members, organizing internally, and listening to workers' concerns.

### Chief Steward

The Chief Steward is usually a local member who has been active as a steward for a number of years. He or she has experience handling grievances and resolving workplace problems and issues. The Chief Steward is thoroughly familiar with the contract, work rules, and management policies and procedures. The Chief Steward also knows the players- the various managers and supervisors that stewards will be dealing with. Some locals have the Chief Steward handle grievances once they reach a certain step in the grievance procedure. Larger locals may have more than one chief steward, each of whom is responsible for a number of stewards in a particular facility, agency, or large department.

The Chief Steward's duties include:

- Being a resource for other stewards, lending his or her experience, knowledge, and expertise to resolving grievances and problems.
- Being an educator and mentor of new stewards in such areas as interpreting contract language or passing on grievance handling skills.

- Maintaining the grievance files for the local and making sure that information is kept available in one central location.
- Chairing the regular meetings of the Steward Committee.

### Training Stewards

It is critical that local union stewards receive the training they need to perform their workplace duties. You will lose an enthusiastic member if they are thrown into the steward's role without adequate training. Many AFGE Districts and councils provide stewards training at their regular leadership meetings. If it isn't possible to immediately send a new steward to a stewards' training class, the new steward should be paired with an experienced steward until they feel comfortable with the basics.

You can find a number of resources for AFGE Stewards online at [www.afge.org/stewards](http://www.afge.org/stewards), including the Stewards Toolkit, Steward's Handbook, other resources, upcoming online trainings, and links to videos.

### Communicating With Stewards

It is important to keep stewards informed and plugged into activities of the local.

Many AFGE Locals have a Steward Committee that meets regularly. By providing a place where stewards can work together on grievances, problems and work place issues, this committee can help develop a strong team of stewards, build the confidence of new stewards, and sharpen the skills stewards need to represent members and build stronger local unions. You can use your committee meetings to discuss current and potential grievances, learn what's happening at different work sites in the local, report on potential problems, and develop problem-solving strategies and action plans.

Other forms of communicating with stewards could include a one-page monthly or weekly Stewards' Bulletin. In order to reach stewards quickly, establish

a group text message chain, phone tree, or e-mail network, to relay meeting notices and other short messages to stewards.

### Recognizing Stewards

Stewards need to be recognized for their efforts. Some suggestions include:

- In Stewards Committee meetings, compliment stewards on a specific job well done: the handling of a grievance, a mobilization activity, worksite meetings, etc. Ask a steward to share a success story.
- Give stewards AFGE items that identify them as a union representative such as an AFGE briefcase, sport shirt, cap, pin, etc. (These items can be ordered from the AFGE Service Department.)
- Ask stewards to represent the union at a



### Leadership Tip: Topics for Steward Committee Meetings

**Steward's Roles.** Ask stewards, "What is the biggest problem a steward faces?" This can generate discussion of the various steward roles.

**Review Current Grievances.** Discuss different approaches to current grievances; strategize how to present a case.

**Contract Interpretation.** At each Committee meeting, spend some time reviewing, interpreting, and discussing a specific section of the collective bargaining agreement.

**Mobilizing the Membership.** Discuss and analyze workplace issues and problems to determine if any would make a good "organizing issue" that members can get involved with and take action.

**Signing Up New Members.** Conduct a meeting on ways to sign up new members. Activities can include establishing an organizing goal for the local, mapping out the workplace to target potential members, recruiting new members using one-on-one communications, and planning "Union Fairs" and "Lunch and Learns."



conference, meeting or dinner.

- Give stewards certificates/awards.
- Run a story in every issue of the local newsletter on one steward.

Stewards are your best source for developing new leadership in your local. As a local officer, encourage stewards to grow their leadership skills and learn more about how the union is run, so that they may be able to take on an even bigger leadership role later on as a local officer.



## Leadership Tip: Coping with Burnout

One of the major problems facing union activists is “burnout.” In many ways, the steward’s job is the most difficult job in the local. They feel the pressure from all sides: members, officers, and management. Thus, spotting and coping with burnout is a key part of any plan for steward development.

The following is a list of warning signs indicating “burnout”:

- Feeling constantly exhausted
- Feeling overwhelmed by union responsibilities
- Becoming short-tempered with co-workers, family, and friends
- Feeling apathetic
- Feeling unappreciated by local officers and members
- Wanting to resign
- Feeling like a failure at work
- Developing family problems
- Increased smoking, drinking or drug use

If someone feels like they are in danger of becoming “burned out,” work with them to determine what steps can be taken. Some suggestions in helping a steward avoid “burn out” include changing their work assignments, cutting back on the steward’s union workload, or providing new training opportunities.





## Communicates and Educates

Stewards are the local's eyes, ears, and mouths on the job site. They are our first line of defense against misunderstandings, management issues, and membership apathy.

Make sure stewards are well aware of issues at your location or in your Agency, and they clearly understand the local's or AFGE's position.

Make sure stewards are listening to all bargaining unit members and communicating any concerns, problems, and priorities to local leadership.

### Chapter Review Questions:

1. Why is having a solid and well-organized steward system so important?
2. Depending on your location or type of work, generally there should be one steward per 20/30 workers.
3. How can stewards receive training? Why is training vitally important for new stewards?
4. What are some ways you can recognize the hard work of stewards at your local?



# Chapter 10: Running Effective Union Meetings



# Running Effective Union Meetings

## Learning Objectives:

- Describe the basics of running a union meeting, including the rules of parliamentary procedure
- Describe steps that should be taken to provide an orderly, efficient meeting
- Name ways to increase attendance and participation in union meetings

## Democratic Decision Making

The local membership meeting is the keystone of democracy in the AFGE local. It is here that the general membership makes decisions concerning the goals, activities, and directions of the local union. One of the most important leadership tasks of a local union officer is to make membership meetings interesting and exciting events, where members – new and old alike – feel welcome to attend and actively participate.

## Running an Effective Union Meeting

A successful union meeting is one in which the local union is able to:

- Discuss problems and possible solutions.
- Get ideas for making the union more effective.
- Encourage members to participate more actively.
- Dispel rumors or misinformation.
- Build solidarity by giving people a chance to work together and get to know one another.
- Educate members about union goals, why those goals were chosen, and the local's plans to achieve them.
- Bring complaints or conflicts out in the open so that they can be resolved.

## Using Parliamentary Procedure

One of the Local Union President's chief responsibilities is chairing the local meeting. A meeting's business is conducted through a democratic process where the membership recommends,

discusses, and decides on a course of action for each issue that is brought forward. This is all done by following a set of rules, called parliamentary procedure, which ensures that the decisions are made in an orderly and democratic manner. Although the President chairs most meetings, all union leaders should know the "ground rules." The foundation of parliamentary procedure rests on four key concepts of democracy:

- During a meeting, every member has the same rights, and the same responsibilities, as every other member.
- Only one question is considered at a time — this avoids confusion.
- The majority rules — always.
- Individual members have rights that the majority cannot take away; namely, the right to be heard, no matter how unpopular the opinion may be.
- The wishes of the members must be balanced with moving along the meeting so that the welfare of the local as a whole is served.

If you are not familiar with parliamentary procedures, you may want to review the rules before each meeting to remind yourself of its terms and procedures. You may also want to take the "Rules at a Glance" from this section to the meeting. Most meetings will flow easily and similar procedures will repeat over and over throughout the meeting. Soon enough, the rhythm of motions, amendments and voting will become second nature to you.

## The Meeting Chair

Generally, the Local President will serve as the chair of the meeting. The chair's duties include:

**Keeping the meeting moving along:** The chair makes sure the conversation is not dominated by only one or two members, and should steer the conversation back to the subject if speakers get off track.

**Assuring that the members understand what is going on and which rules apply:** The chair can repeat the question before membership, help word a motion, or explain how a member can accomplish their goal under the rules.

**Allowing a full discussion to take place before voting:** The chair must make sure long-winded members keep their remarks as brief as possible, and make sure those who wish to speak are recognized in order.

**Protecting the minority and making sure everyone has a chance to state their opinion on a motion:** The chair should ensure that no one is shouted down when it's their turn to speak, and that multiple viewpoints are allowed to speak on the issue.



## A Checklist for Running Effective Union Meetings

- ✓ Carefully plan and organize the meeting agenda ahead of time. This is the task of the President and the Executive Board. Any unfinished business from the previous meeting should be incorporated into the next meeting's agenda. Make the agenda available to members.
- ✓ Provide the membership with advance notice. You can use leaflets, newsletters, bulletin boards, and email. One-on-one conversations with members in the week before the meeting are one of the most effective ways to get members to show.
- ✓ Choose a day, time, and location that is most convenient to the majority of members. If varying shifts make this a problem, consider rotating the day and time so more members can get involved.
- ✓ Be sure the meeting space is comfortable, convenient, and accessible to all members.
- ✓ Start the meeting on time.
- ✓ You might incorporate an opening activity to build community and interaction, such as an ice breaker activity or singing "Solidarity Forever."
- ✓ Run the meeting efficiently, smoothly and democratically.
- ✓ End the meeting on time.

## ALL THE RULES AT A GLANCE

	Motion	Debatable	Amendable	Requires a Second	Vote Required	In Order When Another is Speaking	Can Be Reconsidered	Motions	Motions Which Apply to it
Privileged Motions	Adjourn	No	No	Yes	Majority	No	No	None	None
	Recess	No	Yes	Yes	Majority	No	No	None	None
	Question of Privilege (treat as main motion)	Yes	Yes	Yes	Majority	Yes	Yes	None	All
	Appeal	No	No	Yes	Majority	Yes	Yes	Any decision of the chair	Lay on table, Close, Debate, Reconsider
Incidental Motions	Point of Order	No	No	No	Only if appealed, then majority	Yes	No	Any motion or act	None
	Parliamentary Inquiry	No	No	No	Same as above	Yes	No	None	Withdraw
	Objection to Consideration of Question	No	No	No	2/3	Yes	Yes	Main questions & questions of privilege	Reconsider
	Withdrawal of Motion	No	No	No	Majority	No	Yes	Any motion	Reconsider
Subsidiary Motions	Suspension of Rules	No	No	Yes	2/3	No	No	Any motion where needed	None
	Lay on the Table	No	No	Yes	Majority	No	No	Main questions, appeals, quest. of privilege, reconsider	None
	Previous Question (close debate)	No	No	Yes	2/3	No	Yes	Any Debatable motion	Reconsider
	Limit or Extend Limits of Debate	No	Yes	Yes	2/3	No	Yes	Any Debatable motion	Reconsider
	Postpone to a Definite Time	Yes	Yes	Yes	Majority	No	Yes	Main motion, quest. of privilege	Amend, Reconsider, Limit or close debate
	Refer or Commit	Yes	Yes	Yes	Majority	No	Yes	Same as above	Same as above
	Amend	Yes	Yes	Yes	Majority	No	Yes	Main motion, limit debate, refer, postpone fix time of meeting	Amend, Reconsider, Close debate
	Postpone Indefinitely	Yes	No	Yes	Majority	No	Yes	Main motion, ques. of privilege	Limit or close debate, Reconsider
	MAIN MOTION	Yes	Yes	Yes	Majority	No	Yes	None	All
	Take from the Table*	No	No	Yes	Majority	No, except new main motion	No	Any motion which has been tabled	Withdraw
	Reconsideration to which it applies is debatable*	Yes, if motion is debatable	No	Yes	Majority	Yes	No	Any motion except adjourn, Suspend rules	Limit debate, Lay on table, Postpone indefinitely
	Motion to Rescind*	Yes	Yes	Yes	2/3 of members present, notice to rescind	No	Yes	Main motions, Appeals, Ques. of privilege	All

\*These are treated as if they were main motions

The chair is also responsible for determining if a quorum is present. A **quorum** is the minimum number of members that must be present for the local to conduct business and make decisions (exceptions include scheduled nominations or elections). If there is no quorum, members may try to obtain one, by calling or texting members. The number required to constitute a quorum is dictated by the local's bylaws, but AFGE's position is that a quorum is the number of officers plus one.

The chair must also be very familiar with the local's Constitution and bylaws as well as AFGE's National Constitution, in case a ruling on constitutional questions is necessary. Violating the constitution is a serious matter, even if done accidentally.

It's important that the chair know enough about the rules of Parliamentary Procedure to run the meeting and to clear up problems that may come up during the meeting. But that does not mean that the chair must know all the rules by heart – it is more important that the chair and the members stay true to the spirit of democratic procedure than it is to assiduously adhere to every single rule.

## Chairing a Union Meeting in Ten Easy Steps

The Local President has the responsibility of chairing two types of meetings: membership meetings and Executive Board meetings. While no two meetings will have the exact same activities, here is a ten-step guide to conducting an effective and productive meeting.

### STEP 1 – Call to Order

Rap your gavel and declare:  
"I call this meeting to order!"

### STEP 2 – Roll Call of Officers

"The Recording Secretary will call the roll of officers."

The Recording Secretary then calls the roll in a clear voice, providing pauses for each officer's response.

### STEP 3 – Reading of Minutes

"The Recording Secretary will read the minutes from the previous meeting.

The Recording Secretary then reads the minutes in a loud, clear voice.

"Are there any additions or corrections to the minutes. (pause) If not, the minutes stand approved as read." If there are corrections, ask for unanimous consent to approve the minutes as corrected; or ask, "Does the Chair hear a motion to approve the minutes as corrected?"

### STEP 4 – Reading of Correspondence

"The Recording Secretary will read the correspondence." Letters requiring action by the membership should be discussed by the Executive Board before the meeting. At the membership meeting, the Recording Secretary should read these letters along with any recommendations for action by the Board.

Ask, "Does the Chair hear a motion to accept the recommendation of the Board?"

### STEP 5 – Officer Reports

"We will now have the officers' reports." The President's Report should include any actions taken by the Executive Board at its meeting and the agenda for this meeting. Copies of the agenda and minutes of the most recent Executive Board meeting may be distributed.

Copies of the Secretary-Treasurer's Report should be distributed at the meeting. The Secretary-Treasurer then reviews the report and answers any questions. Other Officers' reports should be provided by those (e.g., the Vice-President or Executive Board members) who have responsibility for a particular activity in the local. After each report ask: "Does the Chair hear a motion to accept the report of the (officer title)?"

### STEP 6 – Committee and Staff Reports

"We will now have committee and staff reports. For Committee Reports, the Chair should describe the

Committee’s activities and/or progress on a project; the report may include a recommended action which the committee wishes the membership to take. After each report ask: “You have heard the report of the [name of the committee]. Is there a motion to accept the report?”

The Staff Report (if applicable) should include current information of interest to the membership. Examples would be reports on grievances, contract negotiations, organizing, or Council activities.

### **STEP 7 – Unfinished Business**

“Is there any unfinished business?. This includes any items left over or referred from a previous meeting, which require action by the membership. A motion from the floor can be made which addresses a specific topic.

### **STEP 8 – New Business**

“Is there any new business?. This includes items raised at this meeting which were not necessarily on the agenda, but which require membership action. A motion from the floor may be made addressing a specific issue.

### **STEP 9 – Good and Welfare**

“Is there any good and welfare?”  
This provides the members an opportunity to discuss the general welfare of the union. Such activities as guest speakers, acknowledgements, updates on a member who is ill, etc. can take place during this portion of the meeting.

### **STEP 10 – Adjournment**

“Do I hear a motion to adjourn?”

A motion for adjournment is not debatable. If passed, this concludes the membership meeting.

Keep in mind that no matter how great or well-planned your meetings are, there will still be some people unwilling or unable to attend. That’s why it’s important to communicate the purpose, decisions, and outcome of union meetings via other means, such as email or the newsletter, so that all members can stay informed.



## **Has Active Membership**

Parliamentary Procedures allow for orderly and effective meetings, and also serve to create an environment in which all members feel welcome to speak and to participate.

Creating and maintaining an environment in which members feel that their voice is heard is not an easy task, but this kind of environment is the only one that will encourage more members to attend meetings and to become engaged in the work of the union.

### **Chapter Review Questions:**

1. What is the purpose of union meetings?
2. List the ten steps of a typical union meeting.
3. Describe a union meeting that you’ve seen run very well. What worked?
4. Describe a union meeting that was not well run. What was the problem?



# Chapter 11: Running Union Elections



# Running Union Elections

## Learning Objectives:

- List the requirements for running for an AFGE local office
- Explain the function and duties of the Election Committee
- Recognize common pitfalls or problems that may be encountered during an election

AFGE local union officers are elected by the total membership, with elections usually running every three years. Who can run for elections, and the rules and procedures for how elections are to be conducted, are determined by federal law (the Labor-Management Reporting and Disclosure Act), by the National Convention, and spelled out in Appendix A of AFGE's National Constitution. In order to run for an elected office, an AFGE member must:

- Be a member in good standing
- Be a member of an AFGE local for at least one year
- Not be a member of any labor association not affiliated with the AFL-CIO

Local union elections are intended to promote and exemplify democracy, and the procedures developed by AFGE's National Convention are designed to produce fair, accessible, and unbiased elections. The rules governing union elections instruct local leaders how to maintain neutrality and ensure fair campaigns and elections, how to facilitate the election process, and how to collect and implement the results. (For a more detailed description on election procedures, refer to AFGE's Election Manual, available online at [www.afge.org/manuals](http://www.afge.org/manuals).)

## Selecting the Election Committee

The authorities who conduct local union elections are the members of a local union election committee. No local union president may serve on this committee. How the local selects election committee members depends on its specific rules and regulations; some locals require a vote of their membership, while others allow each candidate for office to pick a

representative to serve on the committee. Once the committee has been selected, its members must review the AFGE rules of conduct for an election as outlined in the AFGE Constitution.

The committee's primary function is to determine the logistics and rules for the election. This means the committee is responsible for deciding on the election calendar, updating the union membership lists so all members can be contacted about the election, holding a nomination meeting and verifying the eligibility of each candidate. Then, by establishing a set of rules regarding campaigning and the election itself, the committee is able to ensure that no candidate has an unfair advantage, and that the election results will truly reflect the majority decision of the membership.

## Running the Election

The Election Committee must carry out a number of administrative tasks in order to prepare for and conduct the election, including:

- Choosing a polling site
- Arranging for secret ballot voting booths
- Drafting the ballot
- Preparing and mailing absentee ballots
- Sending out the election notice

Carefully adhering to an established election procedure will help make it possible for a large number of the membership to participate in the election process.

## Collecting and Implementing the Election Results

The final steps to conducting an election are simple enough, but are incredibly important. The ballots must be tallied by the election committee members, in the presence of objective observers who are chosen beforehand. When tallying the votes, it is important to remember to include any absentee ballots.

After the final tally has been made, the election committee should publish the results according to the local's bylaws; this may entail putting an announcement in a newspaper, or posting the results in a prominent place. Every local union has its own set of needs, and should determine the means of publication of election results based on whatever method best suits those needs.

In the case of a tie, runoff elections may be conducted to select a winner. If there are any protests against the results, the election committee should hold a meeting to address them. Guidelines for how to do this are outlined in the election manual. Like the procedures for preparing for the election, these post-election procedures are in place to ensure maximum participation in the democratic process, and to make certain that election results are untainted and accurate.



## Union Funds, Employer Resources, and Elections

A candidate for a union office **may not** use union funds, resources, or facilities, nor those of their Agency, to promote their candidacy.

Locals must distribute campaign literature when requested, but this must be done at the candidate's expense. All candidates must be treated equally regarding the mailing or distribution of campaign literature.

Union funds **may** be used for:

- Election and nomination notices
- Factual statements of issues not involving candidates
- Administrative expenses related to holding the election (a separate P.O. Box, voting booth rental, postage for notices, etc.)

## Common Pitfalls

When local unions are in the process of conducting elections, they may encounter problems as a result of misunderstanding the election rules and regulations. It is important to be aware of some of the common pitfalls so that your union can avoid them. The following list of “Dos and Don’ts” address the most common errors committed in AFGE local elections:

### DO’s

1. **Do** become familiar with the election provisions of your local’s constitution and bylaws, AFGE’s Election Manual, and Appendix A of the AFGE National Constitution.
2. **Do** update the list of members and their home addresses at least six weeks before the election.
3. **Do** timely issue a dated nomination notice by publication, posting, emailing, and/or mailing. If posted, do get a copy to members not at the worksite, including retirees.
4. **Do** send out a timely dated election notice to each member by mailing it (not by email) to his or her last known home address.
5. **Do** provide alternative means for nominations and acceptances for members absent from the nomination meeting.
6. **Do** allow candidates to inspect a list of members and addresses.
7. **Do** make sure the election of all officers and delegates is by secret ballot.
8. **Do** elect all officers by majority vote. Do elect delegates by plurality vote.
9. **Do** provide for absentee ballots, except when the nomination meeting and the election meeting are combined.
10. **Do** decide any protests by majority vote of election committee members.

### DON’Ts

1. **Do not** require attendance at a certain number of meetings as a criterion for eligibility as a candidate.
2. **Do not** allow any candidate or supporter to use any union or employer (agency or any other) resources in campaigning for office including computer, paper, envelopes, postage, copy or fax machine, email, office space, telephone, desk, or official or union paid time.
3. **Do not** bar any person from voting who has submitted a dues allotment request (SF-1187) to a responsible local officer prior to the cutoff time provided by the election committee’s rules and who is otherwise eligible for membership (unless the committee has set a cutoff date).
4. **Do not** send out the election notice by email or campaign literature with the notice or the ballot.
5. **Do not** use the local’s post office box for election related purposes.
6. **Do not** allow election officials or observers to wear campaign materials (buttons, stickers, hats, etc.).
7. **Do not** require a quorum for nominations or elections. (But a quorum is required to conduct any other business.)
8. **Do not** allow campaigning near the polling place (as defined by the election committee).
9. **Do not** close the polls early (unless sure that all members have voted).
10. **Do not** discard any election records after decision on any election protests. Do not fail to turn the records over to the local’s secretary or to the NVP on an election appeal.

## Chapter Review Questions:

1. Who is eligible to run for an AFGE local office?
2. What are the most important functions of the Election Committee?
3. How do local unions assure that their elections are fair, efficient, and democratic?





# Chapter 12: Collective Bargaining and Representation



# Collective Bargaining and Representation

## Learning Objectives:

- Describe the scope of bargaining (what can and cannot be bargained) for federal and DC government workers
- Recognize the difference between mid-term and term bargaining
- List best practices for successful bargaining

## A Brief History of Collective Bargaining

The three basic rights all workers must have in order to establish a voice in the workplace, maintain safe working conditions, and to resist arbitrary and unfair treatment are:

1. The right to organize into labor unions;
2. The right to exclusive representation from the union we choose; and
3. The right to engage in collective action to support these rights.

## American Workers Have Not Always Had These Rights

Before the 19th century, American workers who organized into labor unions were considered guilty of committing a “criminal conspiracy” against the employer and his property. Not until the severe depression of the 1930s did enough workers discover simultaneously that they were being exploited, mistreated, and abused by their employer. Workers came to understand that collective rather than individual action was necessary in order to achieve basic rights. Working men and women all over the country began taking matters into their own hands. Labor militancy culminated in massive strikes and fierce battles broke out between police and striking workers and their supporters. In 1932, 240,000 workers went out on strike – by 1933 that number jumped to one million.

Labor’s uprising had a decisive effect on public policy. Congress abandoned its commitment to unregulated labor markets and enacted the nation’s

first comprehensive labor law – the National Labor Relations Act (NLRA) in 1935.

Employers immediately went to court and challenged the constitutionality of permitting workers to organize into labor unions. The Supreme Court upheld the NLRA stating that “a single employee is helpless in dealing with an employer” .... Therefore, unions are essential in giving employees an “...opportunity to deal on an equal basis with their employer.” (NLRB v. Jones and Laughlin Steel Corp., 1937)

## Workers Rights in the Federal and DC Governments

In the United States, government workers have more limited union rights than do workers in the private sector. While federal workers in Canada, Spain, and several other democracies, as well as public sector workers in various states of the U.S., have the right to strike, federal workers and workers employed by the District of Columbia are denied this power.

Formal recognition of labor-management relations in the federal government was not established until 1962, when President John F. Kennedy issued Executive Order 10988, giving federal employees the right to collective bargaining. In 1969, President Richard M. Nixon issued Executive Order 11491, expanding these rights and established the Federal Service Impasse Panel, the Assistant Secretary of Labor Management Relations, and the Federal Labor Relations Council (FLRC) to administer the labor relations programs.



## Civil Service Reform Act of 1978.

By 1978, approximately 60% of the employees in the federal and DC workforces were represented by unions. Over the years, a frequent criticism leveled by unions against the federal labor relations program was that they were governed almost exclusively by Presidential Executive Orders. This meant that government workers' union rights were subject to change by Presidents without formal approval by Congress. It also meant that government employees generally had no statutory protection of their right to join or organize for labor purposes.

In 1978, under President Jimmy Carter, Congress passed the Federal Service Labor Relations Statute (FSLMRS) which became part of the 1978 Civil Service Reform Act (Chapter 71 of Title 5 of the U.S. Code). This Act codified the earlier Executive Orders issued by Presidents Kennedy and Nixon. Among the most significant changes brought about by the CSRA was the creation of the Federal Labor Relations Authority (FLRA) to administer the provisions of the Federal Service Labor Management Relations Statute. The FLRA assumed most of the functions performed under Executive Order 11491 by the Federal Relations Council and the Assistant Secretary of Labor for Labor-Management Relations.

Once the workers vote to form a union, the union is recognized as the exclusive bargaining representative of employees. This means that the employer cannot deal with any other employee representative terms and conditions of employment.

## Collective Bargaining for Federal and DC Government Workers

The major difference in collective bargaining for federal employees is that Congress decides wages, hours, and fringe benefits while private sector unions negotiate these items directly with the employer. In the federal and DC governments, workers bargain over "conditions of employment," which cover personnel policies and practices as well as grievance procedures.



## Scope of Bargaining

In the federal sector, all possible bargaining topics fall into three categories: – mandatory, permissive, and illegal/prohibited.

**Mandatory.** If a proposal is within the mandatory scope of bargaining, management cannot legally refuse to bargain over it. For example, hours of work, affirmative action plans, lay-offs and promotions, methods of staffing shifts, and grievance procedures are mandatory subjects of bargaining.

**Permissive Subjects.** These are bargaining subjects which either management or the union may choose, but are not obliged, to bargain. Permissive subjects include the methods used to fill all supervisory positions, the number of workers assigned to a work project, the composition of the bargaining unit, waivers of bargaining rights during the term of a contract and methods of doing work.

**Prohibited (Illegal) Subjects.** These are bargaining subjects which are considered illegal to negotiate. Examples include agency budget allocations, a reduced work week, rates of pay, performance standards, promotion by strict seniority, number of leave days, and retirement.

## The Collective Bargaining Process

The challenge in collective bargaining is to carry out an effective bargaining strategy that includes membership involvement, is completed in a short amount of time, and yields the best possible contract. There are several stages in the collective bargaining process:

1. Developing a strategic bargaining plan for the local
2. Appointing and training a bargaining committee
3. Surveying the members on what they want
4. Drafting bargaining proposals
5. Setting ground rules with management
6. Face-to-Face bargaining
7. Membership engagement and mobilization
8. Reaching a tentative agreement
9. Membership ratification of the contract

## Mid-Term Bargaining: Bargaining During the Term of the Contract

At least as important as negotiating an overall collective bargaining agreement every three or four years is the bargaining that occurs during the term of that agreement. This is the level of bargaining in which AFGE locals are likely to be most involved. Mid-term bargaining could be either supplemental bargaining or impact and implementation bargaining.

**Supplemental bargaining** takes place between a local and their Agency counterpart when the national level bargainers reserve specific subjects of bargaining to be negotiated at the local level. Topics reserved for local supplemental agreements will be laid out, specifically, in the master labor agreement. Supplemental bargaining is often reserved for subjects such as parking, office space, and AWS (alternative work schedule arrangements).

**Impact and implementation bargaining** takes place when a non-bargainable change to working conditions triggers an obligation to negotiate over the changes impact, and how the policy or procedure relating to

the change will be implemented. There are a number of situations that give rise to obligation to engage in impact and implementation bargaining. First, management may take actions which themselves do not need to be bargained, such as reducing the total number of employees, which necessarily affect working conditions.

Second, there might be changes in laws or government-wide regulations which have to be implemented. In either case, the Agency does not need to negotiate the substance of the change but must bargain over the procedures and appropriate arrangements of the change.

This authority comes from Section 7106 (Management Rights) of Title V of the U.S. Code which states in Section (b) (3) that

“nothing this section shall preclude any agency and any labor organization from negotiating... appropriate arrangements for employees adversely affected by the exercise of any authority under this section by such management officials.”

Additionally, a party may identify a mandatory subject of bargaining which was not addressed in contract negotiations and is not covered by the collective bargaining agreement. Finally, the parties may mutually agree to engage in midterm bargaining. The parties are always free to mutually agree to revisit certain subjects before the contract expires.

**NOTE:** If the union was not notified of the proposed change, and/or management ignores the union in its request for mid-term bargaining, and implements the change, file a ULP and grievance, as appropriate, challenging the original unilateral action.



## Leadership Tip: Mid-Term Bargaining Checklist

- ✓ Demand to bargain in writing (consult contract for ground rules – include agreement for interest arbitration).
- ✓ Request a briefing by management.
- ✓ Meet with union executive board – Identify union objectives.
- ✓ Talk with union members – get their input on the change.
- ✓ Discuss possible actions with members. Recruit volunteers for bargaining.
- ✓ Meet with unit employees to discuss possible “adverse effects.” Recruit new members and additional volunteers.
- ✓ Develop a negotiable counterproposal.
- ✓ Present the counterproposal to management in accordance with the CBA.
- ✓ Communicate with unit members on the status of negotiations. Develop alternative courses of action if necessary.
- ✓ Engage the local membership in the process with communications on bargaining, actions to show the Agency that the bargaining unit is mobilized on the issue, and Lunch and Learns centering around the negotiations.
- ✓ Come to an agreement or go to impasse/ arbitration.

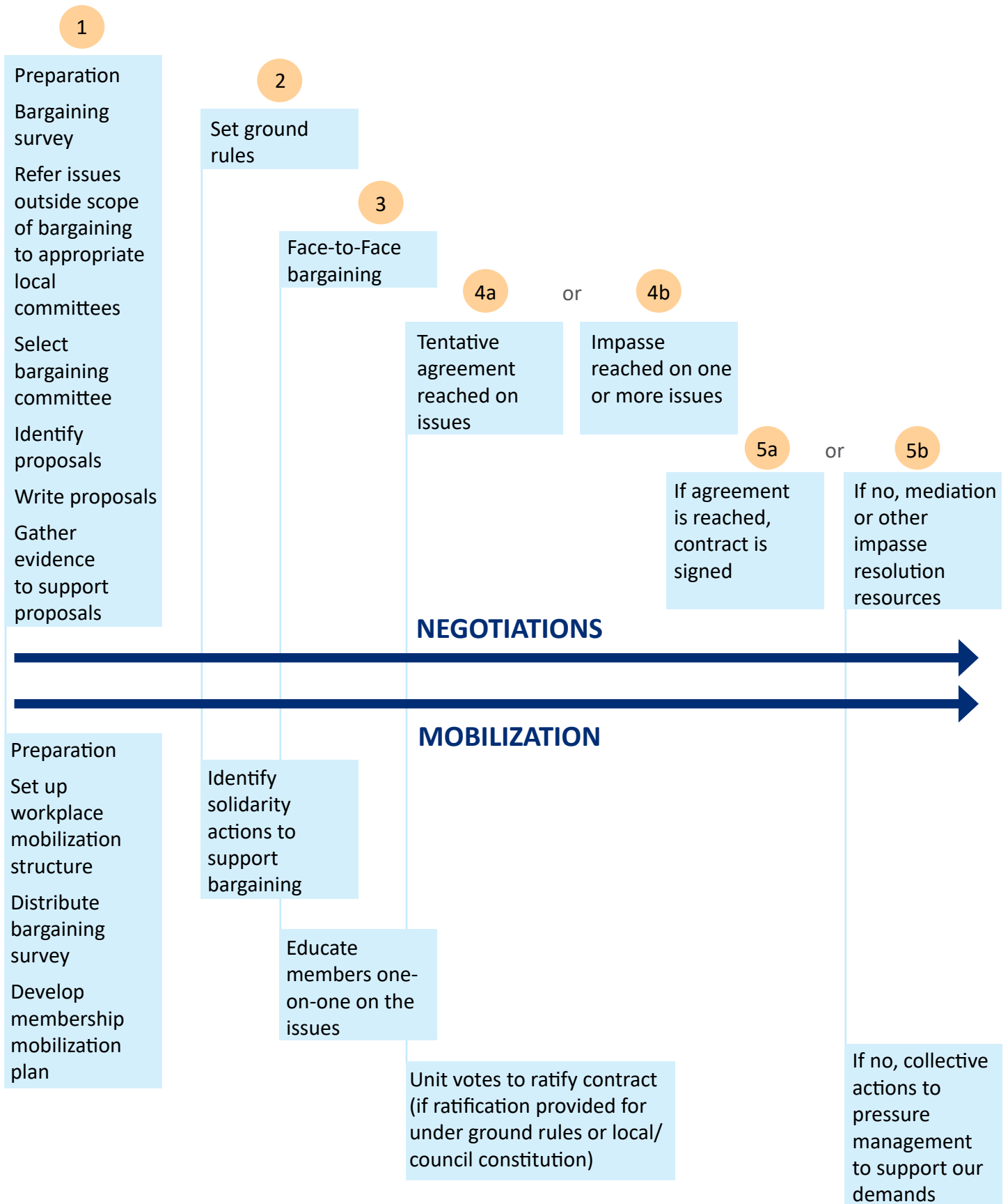
## Best Practices In Negotiating The Contract

There are several things to keep in mind to ensure that your contract negotiations are successful. The following lists some best practices for bargaining an effective contract.

- Gather information prior to negotiations and evaluate past experiences.
- Understand the total work situation.
- Analyze every proposal to determine short term and long term implications.
- Remember that collective bargaining is a two-way street-that parties will often “trade” to get what they want.
- Stand by your position when you know it is fair and obtainable.
- Remember that you have a duty to bargain, but that you are free to disagree and reject any proposal.
- Write contract language in clear, easily understood language. Utilize model contract language from AFGE’s Field Services and Education department.
- Check the final contract draft to make certain that the language is the same as originally agreed.
- Keep the membership informed.

**Term bargaining** in AFGE is generally handled by a national bargaining team with local supplemental agreements and memoranda of understanding (MOU) negotiated directly with the affected local. Whatever the forum, national or local level, the principles for effective bargaining are the same.

# The Who, When, Where, and How of AFGE Negotiations



## Contract Mobilization – Involving AFGE Members in the Bargaining Process

Collective bargaining is a power relationship. And the unity of our membership is the most important source of power we have as a union. The greater the number of union members, the greater our level of community and political support, and the greater our level of membership involvement or mobilization, the greater our power at the bargaining table.



### Leadership Tip: Six Basic Skills in Bargaining

You can ensure a more successful negotiations process for your local and for your bargaining team by following some basic skills:

- **Set Limits and Goals.** Know what your skills are, know what other unions are doing in similar situations, and know what your members want.
- **Keep Your Emotional Distance.** Don't argue, stay on topic, get advice from peers on sensitive issues.
- **Use Good Listening Skills.** Pay attention, practice effective listening skills, get to know your management counterparts, and help your team members.
- **Communicate Clearly.** Keep good bargaining notes, be honest, and get signatures on items you have questions about.
- **Know when to "Close the Deal."** Know when to walk away from a proposal, practice saying "no."



## Represents Members Well

Collective bargaining is the primary means by which your local represents your membership as a whole. Successful collective bargaining means that workers' voices are heard and spoken for and that employees maintain or gain rights and respect in their place of work.

It is important that all members of the bargaining unit understand what the union has accomplished for them by negotiating the best contract possible.

Collective bargaining can also be beneficial to the Agency, as workers who feel respected and well-treated are likely to work harder and remain with their employer longer.



## Chapter Review Questions:

1. How is bargaining in the federal or DC government sector different than the private sector? What can and cannot be bargained? Why?
2. List reasons for mid-term bargaining.
3. How does membership connect to the collective bargaining process?
4. What have you seen work well in local union bargaining? What have you seen not work well?



# Chapter 13: Grievance Handling and Arbitration



# Grievance Handling and Arbitration

## Learning Objectives:

- Describe the purposes of the grievance and appeals procedure
- List best practices for grievance handling at the local level
- List steps for determining whether to take a grievance to arbitration
- Describe the steward's role in grievances and arbitration cases

As a local officer you will be assisting stewards with grievances and deciding which grievances to request to be arbitrated. It's important for our union that we provide stewards with thorough training on grievances and arbitration.

## Why Do We Have a Grievance and Appeals Procedure?

The grievance handling system is at the very core of unionism and workplace democracy. It ensures that workers are treated fairly and provides a method for day-to-day enforcement of the contract. Only workers who are represented by a labor union have a formal process for resolving workplace disputes. Each contract spells out the grievance and arbitration procedures that have been negotiated between AFGE and the Agency.

Local Officers and Chief Stewards are responsible for acquainting stewards with the purposes of the grievance and appeals procedure:

- To enforce the negotiated agreement and agency regulations, and to establish channels through which settlements can be reached;
- To provide a procedure for settling disputes in an orderly, reasonable manner, and to protect employee rights;
- To put the united strength and skill of AFGE behind every member who has a legitimate grievance; and,
- To give federal employees a voice in determining their conditions of employment and a method to fight management injustices against them.

## The Two Basic Kinds of Grievances

The most effective way to teach stewards how to approach grievances is to provide them with an easy way to think about them. We can divide grievances into two categories: "Adverse Action" (Disciplinary) and "Other." Teach stewards to first decide which of the two kinds of grievances they are handling and then to focus their investigation and arguments in the areas needed to win the case.

**Adverse Action.** Most grievances are taken up by employees as a result of a disciplinary action – where management takes an adverse action against them for an alleged violation of an agency rule or regulation. In these cases, management has the burden of proving guilt.

**Other.** These are grievances that are filed by the union against the employer which are based upon a violation of the collective bargaining agreement, federal employment law, or past practice. The union generally files these grievances and we have the burden of proof in these cases.



## Guidelines for Effective Grievance Handling

In training stewards to handle grievances, provide them with the following guidelines for handling grievances effectively:

- Settle grievances on the basis of merit only.
- If the Steward and the first line supervisor who know the situation first hand can settle grievances fairly, it saves time, reduces irritation, and builds members' confidence in the union.
- Avoid delays. Delays worry the worker and result in a loss of confidence.
- Define authority and responsibility clearly.
- Avoid favoritism. Endorse the contract and settle grievances fairly.



## Represents Members Well

In addition to collective bargaining, sticking up for employees who have been treated unfairly is one of the most important functions of your local.

Your members must feel that the union is looking out for them and standing up to management when management is in the wrong, whether that wrong affects one employee or dozens.

This means that your local consistently investigates, files grievances when appropriate, and makes those decisions fairly.

It's also important that your local communicate your success in resolving disputes with management and winning grievances for members.



## A 5-Step Approach to Grievance Handling

Each workday, stewards hear from co-workers about problems on the job. To help determine if these problems are actual grievances and to effectively represent the employee through the grievance process requires five steps: (1) Identification; (2) Investigation; (3) Documentation; (4) Preparation; and (5) Presentation.

**Identification.** Stewards need to know how to differentiate a grievance from a “gripe” or complaint. The basic questions used to guide stewards in determining whether a workplace complaint is a grievance is to ask:

- Is there a violation of the contract or of a law?
- Does it involve an area in which management can be held responsible?
- Is there a violation of agency regulations or of past practice?
- Has the employee been treated fairly?

**Investigation.** Investigation of a problem or complaint begins with talking with people including the affected employee, witnesses who may have seen or heard anything related to the event, and the supervisor involved in the event. For each individual, focus the investigation on asking the same basic questions:

- Who was involved?
- What happened?
- Where did it happen?
- When did it happen.
- Why is this a grievance?

**Documentation.** This is the step of collecting the evidence – mostly on paper – that will support your grievance case. Train stewards to collect as much information as they can – you can never be sure which piece of evidence will turn the case to your favor.

Under federal law, local unions have the right to get information that is needed to do the job of representing employees. Thus, stewards have the legal right to get information from the employer that concerns a grievance or potential grievance.

**Preparation – Writing the Grievance.** Preparation is the key to success in most things we do as union leaders. Grievance handling is no exception. The outcome of a grievance every often depends on how well the steward prepares ahead of time. Writing up the grievance is a useful – and necessary – tool in preparing the grievance. All grievance forms ask for:

- Basic information about the grievant – name, job title or classification, department, work location, agency, etc.
- Information about what happened (or failed to happen) that brought about the grievance.
- A description of what contract provision, work rule, past practice, etc. that management has violated.
- A requested remedy for the grievance.

**Presentation.** Before meeting with management, stewards need to prepare an outline for their case. This helps organize the presentation they will make to management. It can also help define exactly what you want to accomplish in the meeting. Remember that in a grievance meeting, the steward is on equal ground with management. It is no longer boss and employee. Treat the supervisor with respect, and demand respect in return.

## Duty of Fair Representation

When a union wins a representation election, it gains a special status — it is certified as the exclusive representative of all employees in the bargaining unit. With this status comes a legal responsibility known as the “duty of fair representation” (Title VII, section 7114 of the Civil Service Reform Act), which requires that when a union has obtained “exclusive recognition” it must handle the grievances of all employees in the bargaining unit, whether they are members of the union or not.

A steward fulfills the duty of fair representation when all steps are carefully taken to process the individual’s grievance, meeting all time limits in a diligent manner. This means keeping accurate records, logs, and a calendar for each step of the grievance procedure; it also includes advising the employee of your decision on the matter and of the employee’s right to appeal to the Chief Steward and/or Local President.

### Representation Responsibilities

The best way to ensure that stewards and local officers fulfill their duty of fair representation to all members of the bargaining unit is to conduct a thorough investigation. All union representatives charged with handling grievances should:

- Fully investigate possible grievances to determine if they have merit.
- Follow the time limits in your contract’s grievance procedure.
- Keep accurate, written records of each grievance.
- Be a strong advocate for all members of the bargaining unit through the grievance procedure.
- Keep the employee informed about the status of the grievance at all steps of the grievance process.
- Always allow the grievant to submit additional evidence or data.
- Notify the grievant as soon as possible (in writing) if the union decides to stop a grievance for lack of merit or another reason.



## Leadership Tip: Meeting the Duty of Fair Representation

As a local officer, convey to stewards that the best way to meet this responsibility is to follow the principle: “Investigate, file, and process your grievance cases based on the merits of grievance, not the merits of the grievant.”



## Appeals and Arbitration

Once a grievance has been processed through all the steps of the grievance procedure, the final step is arbitration. Arbitration is the most “legalistic” and formal of all the grievance handling steps. A professional arbitrator, selected jointly by the union and management hears the grievance, and makes a determination based upon the evidence. The arbitrator’s decision in the case is considered final and binding. The procedures for moving a grievance to arbitration is negotiated in the contract governing the local’s bargaining unit. In all cases, the union must formally appeal a grievance to the arbitration step.

## How Do We Decide Whether to Take a Grievance to Arbitration?

Once a grievance has been processed through all steps of the grievance procedures, the local leaders must ask themselves, “Will this grievance be taken to arbitration?” In order to answer this question, another question must be asked: “Is there a reasonable chance to prevail in arbitration?”. In determining whether the union has a reasonable chance of winning an arbitration case, the leadership must consider several factors:

1. What are the chances of getting a favorable decision in the arbitration?
2. What will the union gain if we win? (Will it clarify a contract right or enforce a right which is in the contract but which the union has been unable to enforce?)
3. What will be the effect of an unfavorable arbitration decision? Can the union live with a bad decision?
4. Does the case have a strong set of facts/ evidence to support the union’s position? If not, are we better off waiting for a stronger case on which to arbitrate the issue?
5. Is the issue important to the local or to the bargaining unit?
6. Does the case warrant spending the union’s money and resources, or are there other cases that are more compelling?
7. Will taking the case to arbitration satisfy a particular group of members? Will it build solidarity in the long run?
8. Is there a way other than arbitration to achieve the same or better results? Would it be better to wait until negotiations? Could workplace pressure (membership mobilization) achieve a better result?

## The Steward’s Role in Arbitration Cases

A grievance advances from the first, informal step (where the shop stewards are responsible) all the way to the final step: arbitration. Beginning with the initial complaint by the employee and ending with the decision of the arbitrator, the knowledge, and ability of the steward is the single most important factor in a successful case. Cases have been won or lost because of how they were handled at the first step.

The Chief Steward, Local President, or National Representative must depend largely on the steward’s documentation of the case when they carry it through to arbitration. The arbitrator will base the corrective action on what was originally requested by the employee, through the steward and the employee will look to the steward as the vital link for achieving victory and justice. Therefore, a basic understanding of the entire process is necessary for you to perform our duties in the most effective manner possible. Like everyone else, stewards learn through experience.

If the local wants the steward to handle grievances effectively, it must give the steward an opportunity to learn through watching the local’s experienced representatives in action while they handle grievances. When possible, the new steward should be brought in at higher steps of the grievance procedure. The local can also help to assist by providing the steward with advice from the local’s experienced grievance handlers. On routine grievances the steward should be encouraged to seek advice and then go back and handle the first-step grievance alone. This is one way a local can build confidence in its new steward. And last, but not least, stewards deserve and appreciate a word of thanks for a job well done.



## Leadership Tip: Keep the Grievant in the Loop

Throughout the grievance handling process, keep the grievant up to date on the status of the grievance, the date of the next meeting or when the appeal is due back from management, and any discussions that take place concerning the grievance. The employee should never be left in the dark about his or her grievance.

### AFGE Representation: At Your Service

Across government agencies, federal employees are experiencing a steady erosion of their basic constitutional and legal rights including whistleblower protection, the right to collective bargaining and union representation, and the loss of civil service protections. As a result, the need for strong workplace representation of our members has become more urgent than ever.

AFGE has responded to this by increasing its legal representation services to locals and by initiating a web-based grievance tracking system application (AFGE CaseTrack) that will allow Local Presidents to access up-to-the-minute reports and case information at any time.

### Expanding Attorney Representation

At the national level, AFGE's General Counsel's Office (GCO) handles precedent-setting legal issues, court litigation, in state and Federal trial courts and courts of appeals, Hatch Act cases, cases involving discipline proposed against union officers and complex administrative cases and arbitrations (with or without back pay). Additional attorneys in the Field Services Department handle grievances and appeals involving back pay (employee suspensions, removals, reductions in grade, reductions in pay, hazardous duty differentials, or overtime pay), and AFGE's National VA Council (NVAC) has its own permanent attorney in the General Counsel's Office (GCO), handling legal affairs, VA negotiations and litigation at all levels exclusively for the NVAC.

For nearly 30 years, AFGE staff attorneys have generated between \$150,000 and \$200,000 in attorney fee awards annually into its Legal Representation Fund. These funds help to underwrite successful litigation efforts on behalf of AFGE locals and individual members. Similar representation funds involving AFGE Local 1923 and AFGE Council 220, patterned after AFGE's Legal Representation Fund, have also had great success in generating substantial monies to pay for representation by their own full-time attorneys.

It was with this experience in mind, and the realistic expectation that such legal representation funds may ultimately support a greatly enhanced utilization of "cost-free" attorneys to represent the Federation's members and affiliates, that the NEC approved a Federation-wide expansion of the legal representation fund mechanism so that individual locals and councils could develop their own programs, preferably on a joint "banding together" basis so as to maximize economies of scale and minimize cost to each participant. This could be an ideal arrangement for locals geographically located in a single city or commuting area, neighboring locals fighting the same agency (DoD, SSA, VA, etc.) or locals in the same council that cannot afford attorney representation without establishing a sharing arrangement with sister council locals. Underlying this boost in attorney representation is the desire to better serve AFGE locals and individual members through more professional and consistent service. Our goal: if management has an attorney, the union will have an attorney.

### Local Legal Representation Funds

Another resource available for representation is for affiliates to participate in a so-called Local Legal Representation Fund. It is estimated that AFGE locals and councils are currently spending well over \$1million in the aggregate paying individual attorneys or law firms on retainer to handle cases and provide limited advice, without the union being able to recover attorneys' fees. A Local Legal Representation Fund is an attractive alternative.

A “local” legal representation fund is a fund, initially created by “seed” contributions from participating affiliates, from which the cost of an attorney and other litigation expenses may be paid. Attorney’s fees awards received from the government in successful cases are placed in the fund with the expectation that over a two-year period the fund will become self-sustaining and thereafter pay all of the litigation costs of the attorney representing the participants. The attorney may be employed of the fund or under a contractual relationship. If successful back pay cases are completed, the substantial cost of having an attorney represent the affiliates may be alleviated by the fee-generating.

## **CaseTrack: An Online System to Track Employee Grievances**

AFGE Case Track is a web-based grievance tracking system application that allows Local Presidents to access up-to-the-minute reports and case information at any time. Having all of members’ grievance data in one place eliminates redundancy and helps local stewards manage and respond to cases. Most

importantly, it ensures that no grievance gets overlooked, and maximizes the chance of a positive resolution.

Case Track has been designed to be user-friendly. All of our locals, councils, and NRs — every case we have — will be entered in to a system that will build a file on the case from the very beginning. Cases can be retrieved by agency, local, concerned party, case type, case designation, or issue. Additionally, cases can be categorized by employee grievance, union-management grievance, unfair labor practice, MSPB, EEO, notice of change, or congressional contact. Tracking will allow AFGE leaders to spot trends, to identify trouble spots in representation and document those cases involving the Administration that can be acted on at the local level.

For more information, go to [\*\*www.afge-casetrack.org\*\*](http://www.afge-casetrack.org).

### **Chapter Review Questions:**

1. Why is the grievance and arbitration process so important at the local level?
2. List the five steps to appropriate grievance handling.
3. What does “duty of fair representation” mean?
4. How can you keep members of your local informed of current grievances and updated on your successes?

# Chapter 14: Legislative & Political Action and Mobilizing



# Legislative & Political Action and Mobilizing

## Learning Objectives:

- Describe the importance of local political action
- List the lobbying and political activities that are legally permitted and those that are not
- Describe the purpose and activities of AFGE's PAC and LAF
- Describe best practices for developing a mobilization structure and strategy

Congress plays a decisive role in determining the day-to-day pay and working conditions of every government employee. They decide the funding level for the agencies we work for and the contracting laws that those agencies must live by. Thus, the quality and security of our jobs depend upon our ability as a union to elect politicians who will fight to protect government workers, to educate members of Congress to advocate for worker-friendly legislation, and to mobilize our local union members to pressure politicians to support government workers.

## People Power: Mobilizing The Membership

Communication is the key to mobilizing the members of your bargaining unit. If they understand what is at stake for them personally, they will be more receptive to participating in grassroots efforts. Written materials like flyers and newsletters are important communications tools, but alone they are not enough. Personal contact is what signs up volunteers and ultimately persuades people to take action.

## Setting Up a Local Legislative and Political Action Committee

Mobilizing our members for grassroots political actions begins with setting up a Legislative and Political Action Committee in your local. The local's Legislative and Political Action Committee's primary responsibility is to educate and mobilize members for political action including grassroots lobbying and elections. This committee should work closely with

the stewards and the local's Mobilization Committee to build a local union mobilization structure that ensures that all members and non-members are personally contacted.

## Grassroots Lobbying

Elected officials need to hear from union members on a regular basis. As a local union officer, work with your Legislative and Political Action Committee to keep the membership well informed of AFGE positions and priorities on government workers' issues. The union lobbying program should strive to have an impact on legislation at four points:

1. When the bill is drafted;
2. When it is considered in legislative committee;
3. When it is debated on the floor; and
4. When it goes to the President for a signature.

Numbers count in any lobbying effort. At each of these points, local union members can influence the process with face-to-face meetings back home with Representatives and Senators, letters, phone calls, e-mails, and social media posts. Maximize your effort by building coalitions with advocacy groups and by waging a comprehensive grassroots campaign among your members.



## Communicating With Members of Congress

Members of Congress are extremely busy and have many forces influencing how they vote. The power of grassroots action is felt when members of Congress know that a large number of voters are watching them – that’s when they may make different decisions on how they vote. And they will pay more attention to the voters who tell them which issues they care about and why. As a local leader, don’t assume that your Senators or Representatives know what issues are important to government employees. Likewise, many of our members can’t identify their elected representatives or how they vote on federal workers issues.

A great source of information on legislative issues affecting government employees and their families is the AFGE web site, [www.afge.org](http://www.afge.org). By going to the web site and signing up for the AFGE Action News, local leaders will receive e-mail alerts for calls for grassroots actions by AFGE local union members.

## Government Workers Have the Right to Participate in Political Action

In general, federal and D.C. government employees have a statutory right to “individually or collectively” petition (or lobby) Congress. The law legally empowers government workers to contact Members of Congress on their own time (“off the clock”), and off government property (“off the work site”). This right is covered by law in 5 U.S.C. 7211, which states:

“The right of employees, individually or collectively, to petition Congress or a Member of Congress, or to furnish information to either House of Congress, or to a committee or Member thereof, may not be interfered with or denied.”

### Grassroots Lobbying: What’s Legal and What’s Not

As AFGE members, we have a wealth of grassroots lobbying activities available to us that are both legal and effective. As long as the activity is conducted on personal time using our own equipment or



equipment owned by the union, our political actions are protected. What follows is a listing of political actions AFGE leaders and members can take that are legal (DO) and actions that are not (DON’T).

#### DO:

- Visit Members of Congress (MOC) while on leave.
- Write your MOC using your own equipment and your own (or the union’s) paper and postage.
- Contact your MOC using your home phone, personal cell phone, pay phone, or the union’s cell phone or office phone.
- Contact lawmakers using government telephones if you are a union official on official time AND it is permitted under the collective bargaining agreement.
- Use an agency’s mail delivery, e-mail, inter-office phone or other communications system, (IF provided for under a collective bargaining agreement or based on past practice), to advise employees of:

- AFGE’s legislative positions
- Legislative proposals
- Legislative mark-up and voting schedules
- AFGE testimony

**DON’T:**

- Write or phone a MOC when on the job and using the agency’s phone, paper or other equipment.
- Use agency e-mail or other agency communications systems to circulate sample letters urging MOCs to support or oppose certain legislative proposals.
- Use agency e-mail or other agency communications systems to urge employees to contact their lawmakers regarding legislative proposals.
- Use official time and any equipment belonging to an agency to present the views of the union to MOCs UNLESS this is a past practice or is provided for in a collective bargaining agreement.

## People-Powered Politics: Union Power vs. Corporate Power

Getting our allies into office is the first step towards flexing our union’s political power. This takes money, time, and members. Corporate contractors and other opponents of federal employees understand the need to use their political power. They lobby Congress, they mobilize grassroots campaigns, and they call and write public officials. They raise and spend their own Political Action Committee (PAC) money to elect members of Congress who are accountable to corporations and not to government workers and their families. According to the Federal Elections Commission (FEC), corporations have been able to outspend labor unions by as much as 12 to 1 in electing their political candidates at the national level. This translates to corporate contributions of \$709 million to influence elections, versus \$62 million from labor union members’ contributions.

Put simply, we have to do the same. There is a great deal at stake for government workers in who gets elected and how they vote. The outcome of these elections could mean the difference between safe government jobs with workers’ rights and decent pay and benefits and less secure jobs without workers’ rights, health care, or a livable wage.

### AFGE-PAC

Federal law prohibits business and labor organizations from contributing directly to political candidates. Thus unions are prohibited from spending union dues on behalf of candidates for federal office. AFGE-PAC is a separate fund established by AFGE so that individual voluntary contributions can be made to those candidates who support federal employees and their issues. Because all contributions to PACs must be voluntarily made, locals cannot extract a price for a so-called PAC membership. PACs may, however, provide recognition for those who contribute to it. AFGE PAC recognizes contributors at various levels — the emerald, diamond, gold, silver and bronze levels. The law requires that all PAC contributions be made voluntarily by the individual donor. In addition, any person soliciting contributions to a PAC must



## Leadership Tip: Profile Your Member of Congress

The more information we have about the politicians who represent us, the more we can influence a congressperson’s decision. Develop a profile for the Members of Congress who represent your local members. Describe what you know about that member — do they usually support government workers’ issues? Identify which groups are likely to vote for this person. And determine how much influence the local union can have on shaping the lawmaker’s legislative positions on government employees.

inform the member of the time of solicitation of the committee's political purpose. AFGE-PAC may receive up to \$2,000 per year from any one contributor.

### AFGE Legislative Action Fund (LAF)

Each AFGE local and Council is encouraged to contribute to AFGE's Legislative Action Fund (LAF). Money from the LAF Fund is used to provide AFGE members with legislative and political education materials as well as assistance in training and mobilizing AFGE members to conduct grassroots lobbying and political action activities. LAF monies are not used for activities directly aimed at the election or defeat of a specific candidate.

### Legislative Political Coordinators (LPCs)

LPCs are members who work extensively to build relationships with their Members of Congress and their staff. When we face a piece of legislation that could seriously hurt our members, we can activate LPCs to talk to and use the capital they have built with the office to protect our brothers and sisters. LPCs are crucial for being the face of the Union and bringing stories to Members of Congress about why their policies are hurting the middle class. Without strong relationships, we can't ask Congress to work for us.

Basic duties expected of a LPC include:

- Remain updated on legislative and political issues in the district and nationally
- Meet with and contact their member of Congress/Congressional Staff whenever needed
- Stay connected with AFGE National Office and District staff
- Work to increase PAC contributing in the local
- Participate in political events in support of AFGE endorsed candidate.
- Within two years of appointment as LPC, attend a Legislative and Political Training Institute (LPTI)

Both the National and District office will provide support to all LPCs in the execution of these activities. The number one job of an LPC is to build relationships: with Members of Congress, with their



staff. LPCs should try to meet with (in person or over the phone) MOCs at least once a month.

All LPCs should attend a Legislative and Political Training Institute (LPTI). At the LPTI, LPCs will be given extensive training on lobbying, working with the Press, understanding the Hatch Act, and much more! You can visit the LPC Dashboard at [www.afge.org/LPCDashboard](http://www.afge.org/LPCDashboard).

### Legislative and Political Organizers (LPOs):

In person and through email, every LPC will work closely with their Legislative and Political Organizer (LPO). LPOs will help facilitate in-state meetings and conference calls between LPCs to share best practices and talk about issues most pertinent to the state.

## The Hatch Act: Its Importance to Government Employees

In 1939, Congress approved legislation known as the Hatch Act to limit the political activities of federal and D.C. employees, and certain employees of state and local governments. In October 1993, landmark legislation that substantially amended the Hatch Act was signed into law. The Hatch Act Reform Amendments of 1993 landmark allow federal employees to participate more fully in the political process — on their own time and away from the worksite. As a result of reform, most government employees can now attend and be active at political rallies and meetings, sign nomination petitions, campaign for or against candidates in partisan elections, distribute campaign literature in partisan elections and even hold office in political clubs or parties.

However, some federal agencies and categories of employees continue to be prohibited from engaging in partisan political activities. For example, employees of the Federal Bureau of Investigation (FBI), Central Intelligence Agency (CIA), National Security Agency (NSA), Secret Service, Merit Systems Protection Board (MSPB) and career members of the Senior Executive Service (SES) are prohibited from getting involved in the political process.

## Permissive Political Activity under the Hatch Act

Under the Hatch Act, most federal and D.C. government employees may take an active part in partisan political campaigns providing such activity is **off-duty** and **not on government property**. These employees:

- **MAY** be candidates for public office in nonpartisan elections.
- **MAY** register and vote as they choose.
- **MAY** assist in voter registration drives.
- **MAY** express opinions about candidates and issues.
- **MAY** contribute money to political organizations.
- **MAY** attend and give a speech at a political fundraiser, rally, or meeting.
- **MAY** join and be an active member of a political party or club.
- **MAY** sign and circulate nominating petitions.
- **MAY** campaign for or against referendum questions, constitutional amendments, and municipal ordinances.
- **MAY** campaign for or against candidates in partisan elections.
- **MAY** distribute campaign literature in partisan elections.
- **MAY** hold office in political clubs or parties.

## Prohibited Activities under the Hatch Act

There continue to be important restrictions on employees' political activity. Whether on or off duty, federal and D.C. employees:

- **MAY NOT** use official authority or influence to interfere with an election.
- **MAY NOT** solicit or discourage political activity of anyone with business before her or his agency.
- **MAY NOT** solicit, accept, or receive political contributions.
- **MAY NOT** engage in political activity (including wearing a political button) while on duty, in a



## Recruiting Volunteers for Mobilization Activities

- Establish a Local Legislative and Political Action Committee.
- Work with the Local Mobilization Committee to develop an internal structure to educate members and engage them in grassroots actions.
- Develop a local membership database that includes voter registration information and members' interests in grassroots lobbying and elections.
- Ensure that all Legislative and Political Action Committee members have signed up for the AFGE Action News.
- Identify the political and legislative issues that affect government workers, develop an AFGE-PAC theme that addresses those issues, and build your PAC or LAF campaign around that theme.
- Include legislative and political information in your regular union publications. Share grassroots successes.
- Educate members on the issues and involve them in grassroots activities.
- Conduct training sessions for political action volunteers.
- File campaign reports in a timely fashion. Record the name and address of everyone who contributes to AFGE-PAC or LAF.
- Build coalitions to strengthen support for issues affecting government workers and pro-worker candidates.
- Participate in AFL-CIO State and Central Labor Councils' political activities.
- Urge Legislative and Political Action Committee members to participate in local political party committees.
- Maintain a card file or data base of all your volunteers and community contacts.
- Communicate regularly with LPOs, NOs, and NRs for assistance with building the local's legislative and political action program.

government office, while wearing an official uniform or while using a government vehicle.

- **MAY NOT** become a candidate in a partisan election.

### Working With Coalitions To Build Our Political Power

The more groups supporting an issue from a variety of perspectives, the more strength AFGE has. Sometimes the media or an elected official won't deal with an issue that is brought to them by an AFGE local, yet will work well with another person or organization supporting AFGE's position. Statements from AFGE on behalf of government workers may be perceived as self-serving. Despite the union's concern for public service and government services, AFGE is often seen as being concerned only with job security. Another group's concern for the continuation of vital public services may be received more readily.



### Communicates and Educates

As a union leader, it is important to make sure that your members know:

- What issues are most vital to their work and livelihood as government workers
- What the union is doing to fight for their rights
- What the union has previously accomplished for federal workers
- How members can help the cause - e.g. by contacting their member of Congress and participating in union actions
- Understand what is and what is not permissible legally when it comes to lobbying and political activity - penalties for violating these rules include termination!



## Leadership Tip: Tips for Effective Coalitions

- Each participating group must be able to perceive its own self-interest in the coalition.
- A successful coalition does not require total consensus in every area before it can take action.
- Internal group conflict is inevitable, should be anticipated, and should be treated constructively as part of the process of coalition building.
- Negotiating and bargaining are basic to the successful function of any coalition.

Building coalitions adds strength to AFGE's position and additional pressure on decision-makers who want to respond to their constituencies. If elected officials perceive that their proposed changes in public policy are being opposed only by a few disgruntled employees and their union, they will probably proceed. If, however, they are bombarded with letters, postcards, petitions, visits, telephone calls, and news articles calling attention to and opposing their proposals from a broad section of the community, they might be convinced to stop them.

## Mobilizing

AFGE, like most unions, is only as strong as its member involvement. The basic premise of mobilization is that our members are the source of local union power and that we increase this power through membership education and involvement. Mobilizing our members is the strategy for reaching AFGE's three major goals:

1. Contract negotiations and enforcement, and resolution of workplace issues;
2. Effective community, legislative and political action; and,
3. Organizing new members in new bargaining units and building our membership in current units.

## What Is A Mobilization Strategy?

A mobilization strategy helps to create an internal structure that allows the local to systematically educate members on issues and achieve a high level of participation in collective actions. It's a continuous process of organization, education, and collective action.

## How to Build A Local Mobilization Structure

The foundation of mobilization is utilizing the workplace structure to efficiently communicate one-on-one, worker-to-worker, with every single member in a short period of time. Without a well-organized structure, you won't be able to conduct one-on-one communications effectively, and without one-on-one contacts, you won't get high participation in collective workplace actions and in grassroots political action. The best tool for building a mobilization network is mapping. Workplace mapping gives you a visual tool for identifying everyone in the local and where they





are located in the workplace. Once you have a visual picture of who's in your bargaining unit/worksites, you can use this map to develop strategy on a number of fronts: target organizing to those areas where union membership is the weakest; identify union members in different locations who can help organize and mobilize co-workers; develop a regular schedule of visits, etc.

Mapping requires two fundamental tasks:

1. Getting a physical map or blueprint of the entire bargaining unit (for example, most military installations and VA Hospitals have a map of the campus which you can use to map your local); and
2. Collecting data on the individual members of the bargaining unit you wish to place on the map (you can ask directly, send out a survey, or use the employee roster if available). This data includes names, contact information, position and location, shift schedule, and what issues are important to the employee. You can gather this kind of data from bargaining unit employees via:
  - **Surveys.** Ask members directly for it, either in person or through an online survey. This is an easy opportunity to get in front of the members, let them see who you are, and engage in a one-on-one communication with them. Remember it takes 3-6 contacts

before members are willing to engage in some type of union action or event.

- **Employee Rosters.** For example, the VA has an employee work group roster that lists the employee's name, job title, and department and work location. This is information the union has a legal right to obtain in order to carry out its representation duties. Most likely, your local union president or secretary-treasurer will already have these data.

### Mobilizing: Education and One-on-One Contacts

Education is a vital component of membership mobilization. If workers don't understand the issue or how it affects them, they will be less willing to get involved in workplace actions. The primary vehicle for education is through one-on-one contacts.

Talking with workers one-on-one is the best way to be visible with our members, hear members' views, and assess how much support the local has with our members. One-on-one education contacts:

- Reach almost everyone, especially those who may be less active in the union.
- Are more personal. People respond more readily when someone they know takes the time to talk with them.

- Provide two-way learning and communications. Members are much more ready to make a commitment to an idea or an activity when they have had a chance to give their opinion, discuss and ask questions.
- Create a union buzz in the workplace. Members start talking at breaks, during lunch, and in hallways about work place issues and the fight. The union comes alive to people and it gains credibility and visibility.

A mobilization structure is useful in organizing the delivery of one-on-one education on union issues. Local members can divide up the workspace or work shifts and discuss a specific issue one-on-one with 10-20 workers over a short period of time (5-10 days). Usually, these contacts are brief (around 5 minutes), but the mobilizer can also leave the worker with an education piece that contains more information on the issue. If the issue is a pressing one, the member may be asked to join an action in support of the issue. (for example, wear an AFGE pin, sign a postcard, fill out a survey, etc.).



## Leadership Tip: Recruiting Volunteers for Mobilization Activities

The following guidelines are key points to remember in recruiting volunteers and developing new leaders in your local:

1. Ask members in person. Talking face-to-face is far more effective than any other form of communication.
2. Be specific. What exactly are you asking the person to do? Be honest: don't say it requires two hours per month when you know it's more like 20.
3. Give a starting and ending date for commitment. This is the most important principle. Knowing that we are signing up for a specific period of time allows us to feel that the commitment is manageable.
4. Explain how each job fits into the big picture. Volunteers want to understand how the whole project is going to work and why their part is important.
5. Respect that members have full lives. If you call a meeting, start and end on time. Volunteers need to have confidence that meetings will end at a specified time. Have an agenda and objectives for the meeting that are clear to everyone.
6. Give members a range of jobs from which to choose.
7. Ask members to do things they do well. Volunteers are more willing to do things they know they can handle.
8. Encourage questions if members don't understand something.
9. Keep volunteers accountable. Check back to see how the member is doing with the assignment. This sends a message that the work is important.
10. Reward and recognize volunteers.
11. Get the best volunteers more involved. Gradually get the best volunteers more involved by asking them to do a little more each time.
12. Listen to volunteers' suggestions. Ask for their opinion on plans and strategy. Volunteers need to feel that they are helping to create or build the program and not just implementing others' ideas.



## Collective Actions

Collective actions expand on one-on-one contacts: these actions give members a chance to do something around the issue they've just learned about.

Collective actions can be anything that shows management the union is united on the issue: wearing the same shirts or buttons to work, standing up at the job, participating in rallies, and lobbying Congress. Collective actions:

- Allow members to participate directly, increasing their feelings of solidarity with coworkers and the union.
- Send a visible message to management and to legislators that workers are united and serious about the issue.
- Often provide the union with media coverage or an opportunity to utilize social media, which allows us to explain our position to the community and increase community support.

In developing your ideas for escalating a campaign, think in terms of "levels of action." Start with small solidarity actions and build up to more confrontational ones. Understand what your members are willing to do; don't try to push people too far, too fast.



## Chapter Review Questions:

1. Why is local grassroots lobbying and communicating with members of Congress important?
2. Which political activities are permitted and which are prohibited under the Hatch Act?
3. Why are AFGE PAC and LAF vital to our union?
4. Explain why talking with members one-on-one is so effective.
5. In your local, how can you organize active members, stewards, and officers so that they are able to efficiently communicate with as many bargaining unit members as possible?



# Chapter 15: Organizing



# Organizing

## Learning Objectives:

- Describe the purpose of organizing and various methods and tactics of successful organizing
- List ways to start and engage bargaining unit members in one-on-one conversations
- Explain why “issue organizing” is one of the most effective ways to get employees involved in the local

## Why Organize?

AFGE has three major union programs: organizing, legislative and political action, and representation. None of these programs can stand alone. If one of these programs is weak, sooner or later it will weaken the whole Union.

Employers recognize numbers – and strength in numbers is key to a successful future for organized labor. Organizing new members is vital to building an AFGE that is large enough and powerful enough to successfully fight for government workers. Despite a growing anti-government and anti-union sentiment, AFGE has continued to grow our membership through the organizing and strategic planning emphasis of Big Enough to Win.

Organizing cannot be viewed as a separate activity your local may or may not participate in, but must be seen as a crucial link increasing the power of working men and women and their families. If we are to increase our strength at the bargaining table, in the legislative arena, and within our communities, then organizing must be more than just a slogan – it must be a consistent part of every local’s work.

## How to Start an Organizing Program in Your Local

As a local officer, it is your responsibility to develop an overall organizing program for your local. This requires establishing a Membership and Organizing Committee in the local that is involved in internal and external organizing efforts to recruit new members and to organize new bargaining units.

The ideal Membership and Organizing Committee will make up 10-15 percent of the bargaining unit and be inclusive with representatives from all departments, racial/ethnic groups, shifts, various age groups, and from key jobs and trades. The more representative your Membership and Organizing Committee, the better the local union’s chances of having an ongoing and successful organizing and recruitment system within the local.

Once the Committee is established, it is critical that members understand their roles and responsibilities. Their primary tasks are to:

1. Educate co-workers on the issues.
2. Plan and conduct “Lunch and Learns” in the workplace.
3. Participate in union activities.
4. Identify other committee members.

Each quarter, AFGE offers a five-day **Organizing Institute (OI)**. The OI training is designed to help local union activists develop skills in areas of organizing, including: building and maintaining an organizing structure, mobilization, Lunch and Learns, and campaigns. The OI’s can also be tailored for specific agencies, such as the Boot Camp for those organizing in a DoD environment, or designed for organizing around contract negotiations, among other specializations.

In addition, an abbreviated 1-day version is offered to locals and councils for purposes of committee building. Once the activist has taken the tools they have learned back to their local and/or council and

completed an assignment developing an organizing committee, then they could be eligible for placement on a national roster of Temporary Organizers to assist with National Organizing Campaigns. (Contact your District office or the Membership and Organizing Department – M&O- at the National Office for more information.)

## AFGE’s Internal Organizing Model: Issue Organizing

AFGE’s model for recruiting new members and involving local members in organizing is to focus on an issue of high concern to local members, such as health benefits, or career advancement. Everything we do involves an issue that our members care about. These issues are the reason that people organize unions and why they join unions. Issue organizing is a systematic effort to transform the local union from a “service” model of union representation to an “organizing” model where members are actively involved in organizing and other efforts that support workers and build our union’s strength.

A successful “Issue Organizing Campaign” is one where:

- Workers identify the issue themselves.
- Workers are directly involved in developing a solution to the issue.
- Organizing and recruitment takes place around the issue.
- Workers are mobilized to take direct action in support of the issue, including bargaining, circulating petitions, lobbying Congress, and gathering community support.

## Identifying the Issues: Lunch and Learns

One of the best ways to determine which issues are important is to hold a worksite meeting. These meetings provide a non-threatening opportunity for contact between local union officers and activists and the bargaining unit members. Experience has taught AFGE that the best time for holding an issue organizing meeting is during the lunch and/or break

periods, when workers are more likely to attend—especially if we provide a snack or beverage! Hence the term, “Lunch and Learn.” Holding a successful “Lunch and Learn” requires planning, logistics, luncheon and follow-up.

**Planning.** This is the most important aspect of holding a “Lunch and Learn.” Each person takes responsibility for a specific task including selecting the room, ordering the food, and setting up the literature table, including new member applications.

**Logistics.** Getting the word out is critical. Talking with members one-on-one, utilizing the Union bulletin board, desk drops or newsletter and/or e-mail announcements are all good ways to communicate to members and bargaining unit employees that the local is hosting a Lunch and Learn.

**Luncheon and Presentation.** As workers come into the Lunch and Learn, they should be greeted by a member of the Membership and Organizing Committee—this may be the first time many of them have come into contact with the Union. It is important to start and end on time. A guest speaker usually addresses the issue at hand with time built in for signing up new members.

**Follow-Up.** Follow-up should be conducted right away when new members are still thinking about what they learned and how they can help. This is best conducted one-on-one with each new member, informing them when the local holds its regular meetings, how the local operates through its various committees, who is the area steward, and letting them know how they can get involved in the union.

## METROs (Metropolitan Empowerment Initiative)

The Metropolitan Empowerment Initiative (METRO) is designed to bring together AFGE locals in a specific geographic area for a two-week period. During this time, locals receive help from the District and National Office in sponsoring together a series of union-building events designed to boost membership participation, enhance recruitment, and promote worker empowerment.

The primary goal of the METRO is to develop sound and effective locals within areas where there are large concentrations of AFGE bargaining units. During the two weeks of the METRO, host locals sponsor Union Fairs and Lunch and Learns to inform and recruit bargaining unit members.

### External Organizing: Organizing New Bargaining Units

Under the Federal Labor Relations Act (FLRA), organizing a new bargaining unit requires that 30% of the potential membership sign a petition stating their interest in holding a union election. Careful targeting and coordination with AFGE Councils, Districts and the National office will ensure the greatest success in building the local union through new unit organizing.

**Targeting New Work Sites for Organizing.** Choosing a work site to organize is based upon a number of considerations including organizing leads from local union members, requests for organizing help from interested workers, and national campaigns developed jointly with AFGE Councils, Districts, and the National Office.

**Name Recognition.** In the beginning of a new organizing drive, the role of the union organizer is to provide information about how AFGE operates – who it represents, its democratic decision making process, and its achievements on behalf of government workers and their families. It is important that local officers and other members of the Membership & Organizing Committee be able to answer potential members' questions regarding membership dues and employer retaliation. Discuss how the union

will impact their workplace. And emphasize that the workers ARE the union, which is not a third party.

**Identifying On-the-Job Leaders – Establishing an Organizing Committee.** Once you have at least 30 percent of interested employees, it is time to identify leaders from the new unit who can act as a contact person between the union and the work- force. Look for a leader who is outspoken and respected by coworkers. Ask them if they are interested in organizing a union at their work site. Keep the organizing drive confidential until there is enough support to take the campaign public.

Create an Organizing Committee in the new unit that reflects the diversity of the workers and represents about 10-15 percent of the total bargaining unit. These should be members who have good work records, are respected by their coworkers, and are willing to work and be public in supporting the union.

### New Forms of Organizing

**Following the Work: Organizing in the Private Sector.** A handful of AFGE Districts have successfully pursued Follow-the-Work Campaigns. Knowledge of private sector organizing tactics and techniques are a must when following work from the government to the private contractor environment. (For more information about the specific challenges involved in a “following-the-work” effort, contact your District office or the Membership and Organizing Department.)

**The “Open Source” Model.** The creation of the Transportation Security Administration (TSA) in the U.S. Department of Homeland Security has created an opportunity to explore alternative methods of providing union representation to every government worker. Rather than focusing on gaining majority support from workers within a bargaining unit, the “open source” approach allows for a smaller number of employees to organize and achieve minority status at their workplace.

The “open source” model of union organizing is



currently being waged at the national level in the TSA. This campaign allows for any airport screener to belong to AFGE without first showing majority support for AFGE. This has enabled airport screeners to establish an AFGE local and slowly build the campaign for majority support in the future. UFCW has also adopted this model in attempts to organize Walmart and fast food workers. The available evidence shows that a large proportion of the workforce, including government workers, want union representation or workplace services that unions are uniquely situated to give. Capturing even a small portion of this group would considerably boost membership rates within AFGE.

## Face-to-Face Recruitment Techniques: The Power of You

When potential members are asked why they don't belong to a union, the single biggest response is, "Nobody asked me!" In addition to Lunch and Learns, face-to-face recruitment is one of the most effective ways to attract new members of AFGE. There is no better representative of AFGE than you, the local leader. Here are some techniques to help you approach potential members:

- **Presentation:** Consider how you present yourself to a potential member and the

language you use. Be assertive and clear in your arguments, but not pushy.

- **Opening lines:** "AFGE is concerned about" or "some people have contacted us" are good ways to start a discussion. You could use workplace flyers to ask someone if they've seen it.
- **Language:** A good technique is to use inclusive language such as 'our union' or 'your union.' Avoid union jargon as far as possible.
- **Examples:** Illustrate your arguments with real-life examples of how the union has been effective in their workplace.
- **Conversation:** Take the time to learn about the worker and the workplace. Ask them how long they have worked there and what their job or role is. See dialogue tips below.
- **Issues:** Identify issues affecting them. Start with general questions before moving to the details. "How are things here?" and "What is good about working here?" offer the chance to move forward.
- **Specifics:** Don't promise a potential member things, but do highlight areas of hope. If you're aware of an issue in the workplace, ask the potential member about it. Be honest about the union.

## Conversation Starters for Face-to-Face Organizing

### 1. Opening line

- “Have you seen the AFGE flyer on ...? What did you think of it?”
- “I have been talking to some other people and they think...”
- “We have been trying to get people together to...”
- “AFGE is concerned about...”

### 2. What to say next

Identify issues. Start by using general questions and then narrow the focus:

- “How are things going here at work?”
- “What has changed here recently/over the last...?”
- “What would you change if you could?”

### 3. Learn about the worker and workplace:

- “How long have you been working here?”
- “What is your job/role?”

### 4. If the worker is already aware of an issue, use this to open up the conversation:

- “Are you worried about...”
- “What is happening about...”
- “How do you think you and your workmates could be affected by...”

Listen and ask questions for at least 70% of the time when you first meet a potential recruit. Keep in mind that potential members are more likely to be recruited by colleagues they know and trust.

- **Success:** Publicize recruitment successes. If you turn out to be really successful, let the rest of AFGE know by getting in touch with your District office.
- **Be Organized:** Keep a list of all members and potential members in your constituency. Make sure you are told when new employees start work.
- **Materials:** Keep and use AFGE recruitment materials, and consider producing your own to supplement these. Always carry application forms – you never know when you’ll need them. Effective Tools for Organizing: Member Benefits

AFGE offers a myriad of member benefits including college scholarships and online learning, and consumer benefits that offer everything from pet insurance to legal services.

The AFGE Benefits Program can be instrumental in organizing new members and in retaining existing members. They are the immediate reward for being an AFGE member. In some cases, utilizing these programs can equal or exceed the cost of membership. The Legal Program has a value of \$150 to \$200 per year, and members get on average \$1050 cash back for buying and selling a home. For detailed information on AFGE member benefits, please see [www.afge.org/member-benefits](http://www.afge.org/member-benefits).

Learning to listen to members of your local bargaining unit will provide you, the local leader, with a clearer picture of what their specific interest and needs are. You can then use this information to link the employees needs with specific AFGE benefits. For example, when you learn that a potential member has teenagers who need braces, you can use AFGE’s dental benefits as a tool to recruit this employee.





## Leadership Tip: Seven Mistakes to Avoid in Organizing a New Bargaining Unit

1. **Poor Targeting.** Even if workers are interested in AFGE, we should not pursue an organizing drive unless we've determined that we can actually win.
2. **Not Building an Active Organizing Committee.** Without a diverse and well trained organizing committee, the campaign becomes a fight between the employer and the union organizer – with the employer holding most of the advantages (access to the workers, power over working conditions, etc.). Use of acronyms (FLRA, BUEs, ULPs, etc.) and jargon can be avoided by building organizing committees that speak the language of the workplace.
3. **No Campaign Issues.** A general campaign message – “AFGE is the Union for You!” – will not build the support needed to organize a new bargaining unit. Find out what workers care about and speak to those issues.
4. **Poor Base of Union Support.** It is often easier to talk only with key activists rather than setting up a system for personal contact workers throughout the unit. The result, however, may be that key issues are missed, individual workers' questions are never answered, and the key activists' perceptions turn out to be wrong.
5. **Declaring, “I am the union, and I'm here to organize you.”** If AFGE member organizers convey that message in meetings, conversations and literature, everything the employer says about “outsiders who want your money”, will ring true. A more effective attitude is, “You are the union, and I'm here to help you get the employer
6. **Scheduling Boring and Unnecessary Meetings.** For most people, time is precious. If committee meetings turn into lectures or accomplish nothing, workers may be turned off to the whole campaign. Develop an agenda and stick to it!
7. **Making Promises You Can't Keep.** If you lead workers to expect certain improvements in their first contract, or that working conditions will improve overnight, they may become demoralized and withdraw their support for AFGE.

### Retired from Work, Not from the Union

At AFGE, nearly two-thirds of our current membership will be ready for retirement within a few years. As local union leaders, we need to recruit our retirees to continue their involvement with AFGE. There are a variety of reasons why AFGE members seek to continue membership upon retiring — to remain active, to socialize with former colleagues, to access

benefits, to preserve health and prescription benefits, to receive discount purchasing programs, etc. AFGE plans to provide retirees with all of the above.

For more information on AFGE's retiree program, check out the retiree section at [www.afge.org/retirees](http://www.afge.org/retirees), email [retirees@afge.org](mailto:retirees@afge.org), or call (202) 746-6707.



### Chapter Review Questions:

1. Why is organizing so important at the local level?
2. Why is face-to-face recruitment one of the most effective organizing tools at a local's disposal?
3. What are the best practices for successful face-to-face recruitment conversations?
4. What techniques have you found to be most successful in organizing members at your local?

# Chapter 16: Welcoming New Members



# Welcoming New Members

## Learning Objectives:

- Describe best practices for conducting a new employee orientation
- List the benefits of conducting new employee orientations and introducing new employees to the union as soon as possible
- Articulate talking points and conversation openers on the benefits of belonging to a union

## Welcoming New Members

First impressions are lasting. When a new worker arrives at a job site, or when a new member is recruited, their introduction to the union should be a positive one. Educate new members about the benefits of AFGE membership:

- A union contract that features alternative work schedules, fair evaluation promotion procedures, training, and equal opportunity;
- An active voice on Capitol Hill that fights for better pay and benefits, improved staffing, appropriations and other employee concerns; and
- Expert legal and job-site representation that protects employee rights and ensures fair treatment.

## Unions, the Folks Who Brought You...

Let members know what unions have achieved for all of us:

- The 8 Hour workday
- The Weekend
- The Minimum Wage and Overtime Pay
- Social Security
- Medicare
- Occupational Safety and Health Act (OSHA)
- Family & Medical Leave

The benefits of union membership extend outside the workplace, too. A strong labor movement helps to raise the standard of living for everyone.

## New Member Orientation

One of the important roles for the AFGE steward is to conduct new worker orientation. It is your job as Local President to make stewards aware of any contract language that gives the union time for new worker orientation so they can police its enforcement at the worksite. If your contract does not include union time for new worker orientation, negotiate this into contract language during the next round of collective bargaining.

Contract language could include:

**Orientation.** *“The Union will be afforded the opportunity to make a 20-minute presentation during each orientation session for new employees. The Union will make this presentation just prior to the official lunch break. Management will provide the Union with timely notice of the date, time, and place at the time the orientation is scheduled. Each local union should inform the local personnel office in advance of the name of the Union official who will make the presentation so necessary arrangements can be made for the Union official’s absence from duty. The Union may leave its literature in a location where the employees leaving the orientation have access to the materials.*”

Depending upon your agency and your contract, union officials may either participate in formal

new employee orientations, or conduct their own orientations for new bargaining unit employees. If your agency holds formal new employee orientations infrequently (i.e. quarterly), it is possible to negotiate additional time for union representatives to meet privately with new employees, or to ensure that new employees are introduced to their union steward on their first day of work.

One purpose of the orientation is to give members information on the union, but another equally important purpose is for new members to feel that the union is made up of real people, just like themselves, who care about what happens to them. Stewards are the face of the union in the workplace. The more contact we have with new members, the more members will look to the union for information and not the employer.

## Developing a New Member Packet

Every AFGE local can develop a New Member Packet to be given to all new members at orientation. Your local's packet should include:

- Welcome letter
- AFGE and/or local union history and accomplishments
- Contract
- Summary of latest victories and issues the union is fighting for
- List of member-only benefits
- Contact names, pictures, phone numbers, and emails of union officers and stewards
- New employee FAQs
- Explanation of the dues structure
- Schedule of meeting times and location
- 1187 or 277 form

(Contact your District Office or the M & O Department for information on materials.)

You may also want to include a recent issue of your local newsletter.



## Leadership Tip: Benefits of Union New Employee Orientations

- New employees first receive workplace information from the Union, not the Agency.
- New employees develop a positive relationship with the Union before they have a problem.
- New employees will see that the Union is proactive.
- The Union gets to frame workplace issues from the employee's point of view, not the Agency's.

## Conducting A New Worker Orientation

The materials you will need to give to new employees and new recruits at orientation include a copy of the contract, a membership card, and a new member packet. At the end of the orientation you want the new employee or recruit to: (1) be aware that AFGE represents them; (2) understand that wages, benefits and working conditions are a result of an active lobbying effort with Congress, and negotiations between the union and the agency; (3) fill out and sign a membership card and become an AFGE member; and (4) get to know a friendly face he or she can turn to with questions or problems. A New Member or Worker Orientation can be broken down into three simple parts:

**Opening: Getting To Know Each Other.** Introduce yourself. Put the new employee at ease. Find a quiet place where you and the new employee can sit down and talk. An introduction might go something like this:

*"Hello, I'm Faith Wills. I'm the union steward for this work group. I'm an accounting clerk with the GSA and I've been here for 12 years. How about you? Where were you working before this? How much do you know about unions?"*

If there is more than one worker in the orientation, make sure you engage each one in conversation. Give new members the name and telephone number of their steward.

## Sample New Member Letter

Dear (New member's name):

On behalf of the members of AFGE Local \_\_\_\_\_, I am pleased to welcome you to our union.

By joining Local \_\_\_\_\_, you are joining over 200,000 other government workers who have decided to make a better life for our families. AFGE exists to help us do just that.

We're all very proud of our record at Local \_\_\_\_\_. We're a union that has always encouraged members to get involved. to attend meetings, join committees, vote on contracts, participate in workplace actions and grassroots political actions, and speak out on workplace issues.

AFGE is as strong as our members. The more members participate, the stronger we will be and the more we will be able to accomplish in bargaining, and in influencing Congress and the Executive Branch to improve our pay and benefits.

As your work site, the union steward will help you with any questions you have. Please remember that stewards are volunteer union representatives and are doing the best that they possibly can. Your steward is \_\_\_\_\_ (write in name for each packet) and can be reached at \_\_\_\_\_ (write in telephone number for each packet).

Enclosed is a copy of our AFGE Constitution and Local Bylaws.

Again, welcome. We are proud to have you with us. And we hope you will help us build a strong union that contributes to improving the lives of all government workers and their families.

In Unity,

Local \_\_\_\_\_ President

**Talking About the Contract.** Give the new employee a copy of the union contract. Turn to selected pages in the contract and briefly explain the following sections. Don't go into detail—the new worker is more than likely overwhelmed with information.

- **Vacations and Sick Leave.** Point out to new employees what they are entitled to.
- **Holidays.** Highlight the holidays government employees are entitled to and how many there are. Let new workers know these are paid holidays.
- **GSA Wage Schedule and Pay Rates.** Make the point that one of the best features about working in a union workplace is that there are no secrets. By using the wage schedule, workers can keep track of when they are supposed to get an increase.
- **Health Care Benefits.** Let the new employee know how important our health care plan is. Make the point that through AFGE's efforts in lobbying members of Congress, we have improved the health care plan considerably.
- **Alternative Work Schedules (AWS).** Explain to the new member the contract language on AWS and how they can use it to balance their work and family life. Make the point that AFGE and other government workers unions negotiated the AWS benefit with the government.

End the contract discussion by acknowledging that the new employee is probably overwhelmed by all the information they received. Ask them to put the contract in a safe place so when things settle down, they can look through it. It contains a lot of important information they will want to refer to.

### **Why We Need A Union: Signing Up the New Worker.**

Explain that workers need an organization in order to have a voice at the workplace. The union is basically a volunteer membership organization and like any other membership organization, our strength and power is based on the membership. Let the new employee know how proud you are of what AFGE has achieved

over the past century. The collective bargaining agreement and Congressional law gives us specific rights and benefits, and the union makes sure these gains are not taken away.

End the orientation by asking the new worker to join AFGE and make sure you have him or her fill out the membership card on the spot. Let the new employee know how much their monthly dues will be, and that dues are automatically deducted from their paycheck. Explain that AFGE dues pay for lobbying on Capitol Hill, contract negotiations, processing of grievances, educating members and stewards on how to resolve problems, the printing of a newsletter, legal representation when necessary, and membership services.

Also, be sure to let new employees know where the union office is located, as well as when and where union meetings are held.

## **Why Do I Need a Union?**

Without a union, we have little power on the job. The voice of one worker can be ignored but the collective voice of all the workers is not so easily dismissed. The Supreme Court said as much in 1937 when it ruled that it was legal for workers to form unions because:

*"...a single employee [is] helpless in dealing with an employer; he [is] dependent ordinarily on his daily wage for the maintenance for himself and his family; that if the employer refuses to pay him the wage she thought fair he [is] nevertheless unable to leave the employ and resist arbitrary and unfair treatment; that a union [is] essential to give laborers [an] opportunity to deal on an equal level with their employer." (NLRB v. Jones & Laughlin Steel Corp, 1937)*

In today's complex world, individuals join together to increase their effectiveness. Business persons join associations like the National Alliance of Business, doctors join groups like the American Medical Association. And unions are made up of workers who join together for their mutual benefit, like AFGE.

## Differences Between a Union and Non-Union Workplace:

### UNION

1. Your wages, benefits, and working conditions are protected by law and by the union contract.
2. The contract spells out wage progressions for each job title.
3. The union negotiates benefits and working conditions for everyone. The members vote on it. If they think that it is not a fair statement, they can vote it down.
4. If you're disciplined for something you didn't do, the union will defend you.
5. If you do a good job and are in line for a promotion, you will get it.
6. If you don't like something at work, you can work to change it.
7. Vacations, shifts, layoffs, are based on seniority

### NON-UNION

1. Management can change wages, benefits, and working conditions whenever they want.
2. No one knows how much anyone else earns.
3. If you want a specific benefit or accommodation you have to beg for it, or kiss up to the boss.
4. If you are disciplined for something you didn't do you are on your own.
5. Promotions can be handed out on any basis – friendship, loyalty, political support, etc.
6. If you don't like something at work, you can quit.
7. Vacations, shifts, layoffs can be based on the boss' desires.

### New Member Follow-Up

In a couple of weeks, seek out the new employee or new member and ask them how things are going.

**Remember:** What you talk about with the new worker is not as important as the attitude you are showing – that he or she is accepted and welcomed, and that the union cares about what happens to them.

You may, at this time, want to review the grievance

procedure – or at least review the rights to union representation at all disciplinary meetings so new members know that if they have a problem with management, they should call their steward.

(For more details and best practices on new employee orientation, see AFGE's publication, "**AFGE Leader's Guide to Conducting a New Employee Orientation.**")

### Chapter Review Questions:

1. How can your local ensure that you have the opportunity to introduce the union to all new employees?
2. Name at least eight items that should be included in a new member packet.
3. What do you think are the most important parts of the contract to explain to new employees?
4. In signing up new workers, what have you found to be the most effective talking points on union membership benefits?



# Chapter 17: Communications



# Communications

## Learning Objectives:

- Describe how to construct an effective message and various means of delivering that message
- Apply communications best practices at the local level
- List various methods for organizing successful local events, rallies, and communications with media

## What is Communications?

Communications is a vital function of the local. How we communicate with one another through face-to-face meetings, newsletters, flyers, and digital tools shapes our connection with our local and AFGE members nationwide. We're able to highlight our successes, speak out against unfairness in the workplace, and solidify our place in the broader labor movement. Through digital, print, and in-person communication tools, we give a voice to the people and issues that matter most to us.

There are three elements that we must consider when using communications:

- 1. Values** – what drives our members and connects them to each other.
  - Think of values as a shortcut to getting buy-in from someone on an issue they may not be familiar with. Every connection is an opportunity for inclusive, union-building communication.
- 2. Messaging** – how those values are turned into language that connects our members with our priorities.
  - It's not just what you say that matters, but how you say it. The right message can inspire, engage, and empower your members in the fights ahead.
- 3. Tools** – how we distribute the messages that build upon and connect us to our values.

- Platforms like websites, social media, newsletters, and flyers are tools for taking your message and bringing it to a wider audience.

From in-person events to flyers and web-based communication, how we tell our story matters. We have pride in our union's diversity and must work to create connections and find common ground to make a better life for our members and their families, and to create a government worthy of our nation's founding promise of life, liberty, and the pursuit of happiness.

When we lead with our hearts and values, we're able to change hearts and minds and engage new activists in the journey toward a better future.



## Leadership Tip: Three Parts of an Effective Message

- 1. Make a value statement** on a relevant issue/person
  - Relate to your audience and grab their attention
- 2. Establish the problem**
  - Something that affects your audience
- 3. Introduce the solution**
  - What can be done to take care of the problem
  - Make sure your audience sees themselves as part of the solution

## Connecting with AFGE's Communications Network

AFGE Communications Department is here to tell compelling stories that magnify your voice, advocate for your issues, and help you mobilize for action. Through media outreach, advertising, websites, photos, videos, and social media, AFGE Communications is bringing your stories to the world every day.

As a local leader, it's important that you're in the know. Here you'll be introduced to the many communications channels AFGE has to offer. Sign up and follow each of them so you'll always have your finger on the pulse of our movement.

### Connect with Us on Social Media

Connecting with our members digitally provides an expanding opportunity to reach activists near and far. We can keep them updated on news and actions as they happen, as well as engage in conversations on how to move our movement forward. Sharing stories, photos, videos, and updates on social media keeps activists informed with shareable content available 24/7.

Here's a list of content that's ready to share with your members:

Facebook: [www.facebook.com/afgeunion](http://www.facebook.com/afgeunion)

Twitter: [www.twitter.com/afgenational](http://www.twitter.com/afgenational)

Instagram: [@afgeunion](https://www.instagram.com/afgeunion) and [@afgeyoungworkers](https://www.instagram.com/afgeyoungworkers)

### Email and Mobile Sign-ups

As a new leader it's important that you are connected with the information you need as an AFGE activist. By signing up for AFGE's e-activist network, that information will be delivered directly to your email and/or mobile device. Simply visit [www.afge.org/getconnected](http://www.afge.org/getconnected) to sign up. Remember to use your personal email address and personal mobile device to sign up for these alerts.

## AFGE's Week in Review and Action Alerts

With hundreds of thousands of activists on the rolls of our e-activist network, we are able to mobilize scores of trade unionists at the click of a button. By joining this network, AFGE members are delivered the AFGE Week in Review — a weekly roundup of news and events happening throughout the federation. They are also the first to learn about upcoming rallies, calls to lawmakers, and other actions we need to take in order to further our mission.

## Browse and Share AFGE Photos and Videos

Much of our content is accompanied by images and video of AFGE members in action. You can find thousands of photos available for sharing and download on our Flickr site at [www.flickr.com/afge](http://www.flickr.com/afge). Visual content helps make stories come alive. We recommend you incorporate them in your newsletters, websites, flyers, and social media posts as frequently as possible.

Enriching your online content can definitely come in the form of videos. With a dedicated video program within the AFGE Communications Department, there are hundreds of videos for you to choose from to share on your online platforms. From personal testimonies to collective action to issue-based content, AFGE's videos are the union personified. Watch and share these videos at [www.youtube.com/afgeonline](http://www.youtube.com/afgeonline).



## AFGE Featured Publications

**AFGE's Week in Review.** The AFGE Week in Review is a weekly roundup of the latest stories, actions, and legislation AFGE is active with on behalf of its membership. From leadership gains to policy initiatives to community projects, the Week in Review is a key tool in letting activists know about what's happening in their union. Members can sign up for this weekly e-newsletter on the AFGE website, [www.afge.org](http://www.afge.org).

**Government Standard.** This is AFGE's bi-monthly membership publication and is an excellent source of current news about legislative and policy issues affecting government workers. The Government Standard also contains stories on local union successes in organizing, collective bargaining, grassroots political action, and community service.

**AFGE Leader.** The AFGE Leader is the premier publication keeping leaders of our union in the know about issues impacting government workers and the latest successes around the federation.

**AFGE.org** is home to AFGE's website, which contains a wealth of information on issues, events, and resources. The MyLocal and MyCouncil sections of AFGE.org enable presidents and treasurers to maintain their membership roster and review important financial information.

## Setting Up Your Local Program

The work of union activists is key to the experiences of working people on and off the worksite. So much of our time is spent at work, and how we're treated goes a long way in sustaining our ability to fulfill the missions we are passionate about. Local unions are well-versed in representation and collective bargaining — oftentimes letting communications fall by the wayside. It can often be looked at as an afterthought or not as critical as the representational duties we are accustomed to.

Those representational wins and bargaining efforts need to be shared with members, and communications fits well into all facets of a local.

Communications truly is at the foundation of our activist and representational work. Keeping members informed and connecting with external audiences is an important piece to strong, effective locals. Developing and growing a communications strategy at the local level will contribute to the success of the local and the engagement of the membership.

## Create a Local Communications Committee

A local union communications committee provides an opportunity to implement the tools needed to support an informed and active membership. It's up to local leaders like you to organize a communications committee and empower committee members to spread the AFGE message to the membership. One of the first tasks of the committee should be to develop an internal communications plan for the local.

- What general goals of the union should its communications be designed to achieve?
- What activities and events need to be supported with internal communications?
- What are the roles and expectations of the committee's members.
- Do they have the resources and tools they need to create quality communications?

## Local Communications Coordinator

The communications committee also should include a communications coordinator. This activist will be accountable for keeping the plan on track, curating content for the local's communications outlets, and staying connected with the AFGE Communications Department for the latest content they can share with the local's audiences. They also can assist with connecting your local leadership and other key members of your team in the AFGE National Speakers Bureau so we can connect with you on big stories. This bureau is a collection of AFGE leaders and activists who regularly speak to the media about issues important to AFGE members and the public. A coordinator is a key piece to the local's success in communicating effectively with internal and external audiences.

## Communications Training

Training for communications coordinators is available through the national office. Tips and information can be found online at [www.afge.org/commstraining](http://www.afge.org/commstraining). Web and in-person trainings also are available to assist in the development of coordinators looking to take their local's communications program to the next level.

The AFGE Communications Department also offers a selection of communications sessions during the annual Legislative Conference. This is a prime opportunity for activists to connect with department staff and learn more about tools that will complement their work as trade unionists.

## Developing Tools You Can Use

### Creating Online Union Communications

Implementing web-based tools and embracing digital communication can go a long way in streamlining and delivering the connection points members are looking for from their union. Engaging audiences online is an effective way to augment, complement, and supplement your day-to-day union activities. The ways in which people receive their news and



## Communicates and Educates

One of the most important jobs of the local is communicating with your members! Union communications must be a two-way street in order to be effective:

- How are you listening to your members? How do you know what issues or problems are most important to them? Do members feel heard by local leaders?
- How are you communicating the work of the union to your members and to all bargaining unit employees? Are they aware of what the union has fought for and won for them? How do they know that you are addressing their concerns?



## Leadership Tip: Best Practices Guide

A strong plan and guiding principles are key to having a program come to life. The AFGE Communications Department has you covered with a best practices guide on how to implement effective communication strategies and tools at your local. You can find that guide at [www.afge.org/commstraining](http://www.afge.org/commstraining).

information and engage with family, friends, and colleagues increasingly is taking place online. As a new leader, you may encounter or have your own reservations about using the web as a key communications vehicle. As your local develops its communications team and identifies a communications coordinator, it's important to air these concerns. Take time to survey how you're currently disseminating information and connecting with your membership. You'll likely find that information you're including in desk drops, bulletin board postings, and mailings will translate easily to an online platform — making the information your members need to know available on their schedules.

There are countless online tools available that can take your communications, planning, and task management to the next level. For more information on these tools, visit [www.afge.org/commstraining](http://www.afge.org/commstraining). The AFGE Communications Department also assist locals in developing their own websites based on the national's webpage. Learn more at [www.afge.org/websites](http://www.afge.org/websites).

### Establishing Your Local Newsletter

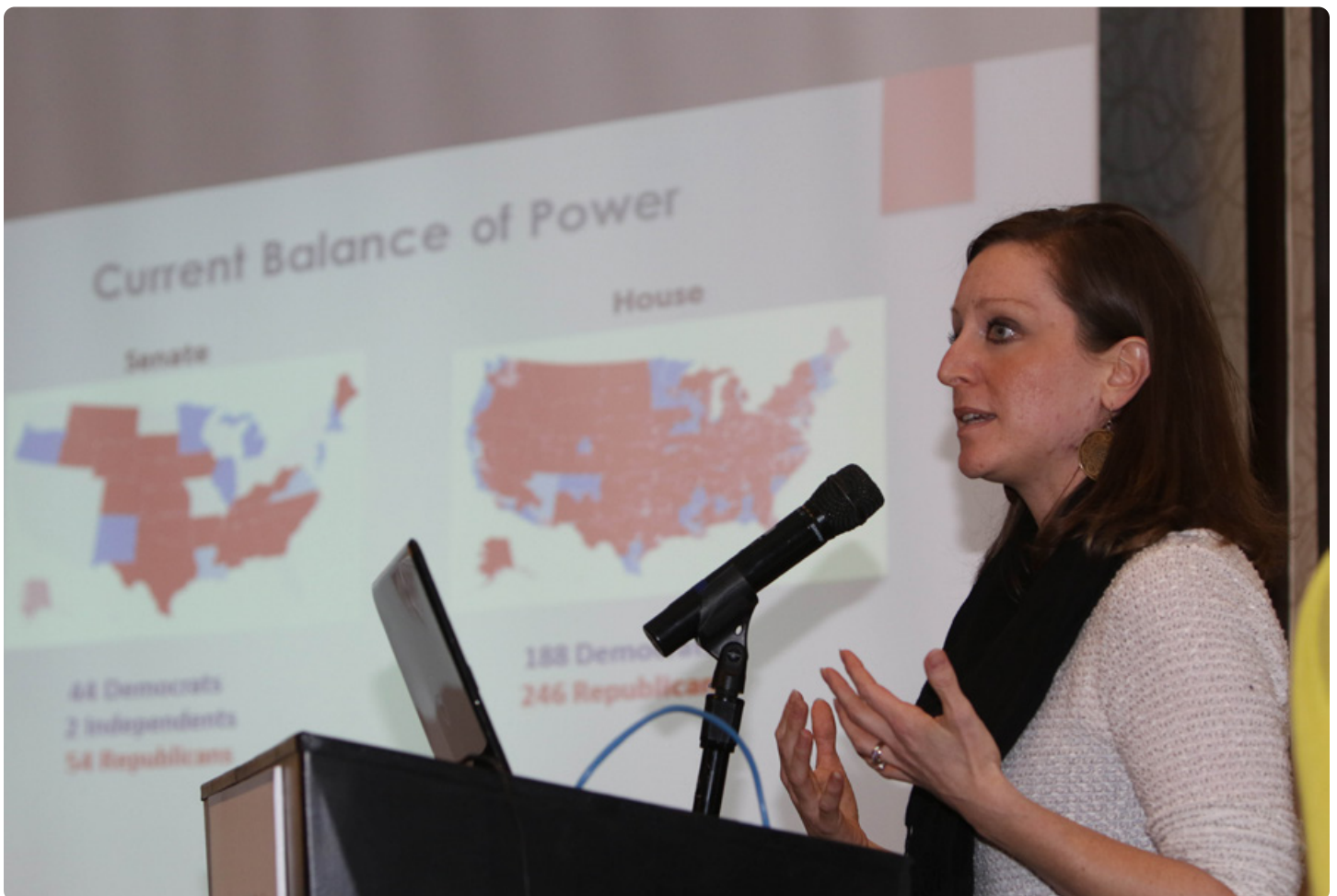
Each local union should have a regular newsletter that helps keep members informed about AFGE activities and issues. Include stories and information in the newsletter that will interest the various constituency groups in your local. Distribute it to all employees and key leaders in the community.

Effective newsletters are simple and uncluttered. The articles should be short, relevant, and to the point. Make the headlines snappy with short, colorful words and active verbs. It should include lots of pictures and graphics and be attractively laid out. Ideas for newsletter articles can include:

- Stories about relevant workplace issues
- News about members and profiles of union members
- Analysis of a particular worksite success or issue
- Information about the collective bargaining agreement
- Updates on political and legislative news (remember to follow Hatch Act and lobbying rules)
- Surveys on relevant issues
- Announcements about union meetings

Locals should strongly consider moving their newsletters into the digital realm if they haven't done so already. Using an email tool like MailChimp can assist locals in getting news and information straight to members' email inboxes. Opting for a digital distribution also helps in cutting down on printing and mailing costs. To get started today, download a list of current member email addresses using MyLocal.

There are a number of email services available that can assist in tracking how many readers are opening a message and the percentage of clicks to website links included in the email. This information is valuable in determining the reach of your content and what members find most engaging.



## Guidelines for Writing a Newsletter

**Write simply & directly.** Don't write to impress—write to express. When you have a choice, prefer the shorter word, sentence, and paragraph.

**Use active verbs.** Don't bore the reader with too many verbs in the passive voice.

**Use words your reader can picture.** Use concrete nouns. Avoid abstract words.

**Be positive—avoid negatives.** Tell the reader what is, rather than what is not.

**Translate the jargon.** Don't assume your audience knows what the FLRA stands for— spell it out the first time, and, if necessary, explain it.

**Avoid unnecessary words.** Read over what you write and cross out every unnecessary word.

**Tell the full story.** Answer the questions of who, what, where, when, why, and how when writing your news story.

**Grab the reader's attention.** The first paragraph (the "lead") should summarize the key elements of the story and grab the readers' attention right away.

**Be consistent.** For example, if you choose to spell out the word "percent" in your newsletter instead of using the "%" sign, it should be spelled out wherever it's used.

**Be credible and accurate.** Get your facts straight. Spell names correctly.

### Local Visibility at the Worksite

#### Branding AFGE

A brand is the promise we make to our members, stakeholders, and the public about who we are and what we stand for. A strong and effective brand creates an impression in the minds of our audiences, a mental shortcut for what we're all about. A brand is expressed through "brand elements" at all points of contact, such as our personal interactions, written materials, promotional giveaways, and digital assets. A strong brand builds a relationship with our audiences based on shared values. It promotes awareness of AFGE stakeholders and communicates our mission. It shapes perceptions of what AFGE does and why we do it, which in turn influences our audiences' thoughts on joining the union, supporting our policy positions, and engaging in collective action. Through the AFGE brand we instill a promise of unity, empowerment, and progress. We use these principles as the foundation of our work as trade unionists and defenders of working people.

**UNITY:** From our constitution to the culture of our union, we know that we are stronger together. By standing together, we give public servants a voice at work and the power to secure better lives for our families.

**EMPOWERMENT:** As activists we exist to empower working people. AFGE cultivates community leaders with legislative, political, representational, and communication skills.

**PROGRESS:** AFGE members have dedicated nearly a century to making life better for public servants and their families. We are committed to cultivating a new generation of labor leaders and giving them the tools they need to move our country forward.

We know that government employees are facing an unprecedented crisis. A hostile Congress and their billionaire benefactors are hard at work to shrink or eliminate government services – hindering the health of our economy and the livelihoods of dedicated government workers.

By positioning ourselves with a unified brand voice, we stand to be leaders of the broader resistance movement – with the AFGE brand serving as our battle flag.

Starting at the local level, our brand can take shape in a multitude of ways. At rallies and events, you and your members can wear your blue and gold AFGE shirts. This is unity and solidarity personified! Complying with the brand also shows up when you use the updated logo and blue/gold color scheme on your flyers, bulletin board postings, and newsletters. The national office can assist you in designing business cards that are in step with our branding guidance. Looking to use a PowerPoint presentation at your next unit meeting? We have a branded template that you can use for your meetings. Find more tips and ideas on implementing our brand at [www.afge.org/branding](http://www.afge.org/branding).

## Worksite Visits

Communications is not always about doing all the talking; it is about hearing others, listening to what they have to say, and responding –to their ideas. A good communications program means that union leaders must be visible and accessible. Meet regularly with your members and get into the buildings where they work – not just for formal meetings but for informal, one-on-one conversations. Worksite visits help leaders stay informed and close to members and their concerns.

## Communicating with the General Public

An important responsibility of AFGE local leaders is to cultivate a positive and dynamic public image of our union to the broader community. If the local is not working to build its credibility in the eyes of the public, other forces over which you have no control will shape the public's perception of AFGE.

## Community Outreach

When the local undertakes one or two major community service projects a year, it sends an important message to the community that the union cares about the general wellbeing of all citizens, not just the job security of its own members. Community service projects can include working with veterans' organizations, discouraging drunk driving, sponsoring an AIDS or other public health fundraising event, and setting up union information booths and exhibits in shopping malls, job fairs, and state and county fairs.







## Leadership Tip: Worksite Visits

- Visit regularly. Always see stewards and members first, before having any discussions with management.
- Keep a record of where and when you visit. Visit all locations and shifts – not just the convenient and/or friendly ones.
- Allow time to listen and talk with members.
- Bring paper and pen to take notes on what members ask and tell you.
- Make sure you quickly follow up on members' questions and requests.

## Communicating with the Press

The news media communicates images and messages about AFGE to the general public. They are a key source of information that shapes the public's attitudes toward labor unions.

Thus, developing a relationship with the media is an important strategy for improving the local's public image. Get your local leadership and other key members of your team in the AFGE National Speakers Bureau so we can connect with you on big stories. Just contact [communications@afge.org](mailto:communications@afge.org) to volunteer as a Speakers Bureau member.

### News Reporters and Editors

Cultivating personal relationships with reporters is an important task for union communicators in shaping the public's perceptions of the local union. A reporter's job is to fill column inches or air time. We have the raw materials they need to do their jobs – newsworthy events, expert testimonies, and human interest stories. Get to know key reporters of the local newspaper, TV and radio news. Meet with them regularly – invite them to appropriate union functions, such as community town halls and public demonstrations. Provide them with research, background information, and story leads whenever possible. You also can follow news in your area or specific topics by setting up Google alerts. As news



happens around issues and events your local cares about it, the news will be delivered to your email inbox.

If asked for an interview, inquire about the topic prior to agreeing to be interviewed. If you are asked to participate in a radio or television program, find out if other guests will appear with you, if the program is broadcast live, and if there will be call-ins or questions from the audience. If the reporter works for a print publication, ask who else the reporter has interviewed.

### Press Releases

Much of the news that is printed or broadcast originates with press releases. A press release announces a forthcoming action or makes a timely comment on an event or current issue. Submit news releases to newspapers, news services, and radio and TV stations so they can incorporate your information into their reporting.

Releases and advisories should be written like news stories, with the most important information in the first paragraph and supporting information in subsequent paragraphs. To increase the chances that the release or advisory will be used by the media, put opinions in quotes. Facts can stand on their own, but sources for the facts should be cited. Opinions that do not appear in quotes should be attributed to a particular party. For example, “According to AFGE Local 123...”. This sort of soft-sell approach will help prevent turning off the reporters or editors who receive the release or advisory. Examples of advisories and releases are available in the Media Center portion the AFGE website. The AFGE Communications Department also can assist you in developing press releases and media advisories for important events and actions at your local.

It is important that a press release be well-prepared with pertinent facts, the impact on workers, and why the issue matters to a local and/or national audience. At times, locals may want to adapt a press release from AFGE national headquarters. Use the format from the headquarters’ release to develop a local release format, and include your local’s angle on the subject. Include quotes on the issue from the local’s president and incorporate examples of how the issue affects government employees in your area.

## Media Interviews

When it comes to interviews, there are a few key rules:

1. Use your message as the basis for your answers. The interview is you speaking directly to the public, so frame your answers as to how your position benefits the community.
2. Remember the ‘mic’ is always on. Stay on message and avoid extraneous commentary during your entire interview experience.
3. Brief statements and concise viewpoints are easier for an audience to digest. You may encounter brief periods of silence during an interview and that’s okay when you’ve made your point.

4. Be yourself and confident in the knowledge you bring to the table. Let your experience as a union activist and public servant shine through!
5. Television interviews are the perfect time to break out your AFGE gear. TV crews are particularly interested in public demonstrations. The next time you have a rally, make sure everyone has on their blue and gold!

## Getting Free Media

In addition to issuing press releases, local leaders can utilize other opportunities for free media exposure. Letters to the editor, op-eds, news conferences, TV and radio talk shows, public cable TV, and public service announcements are all ways to shape the public’s perception of your local union.

## Being a Spokesperson for the Local Union

One of your duties as local officer is to act as a spokesperson for the local — whether it’s being interviewed by a reporter for the local news, participating as a guest on a call-in talk show, or getting caught by cameras as you step outside your office. Being prepared is the best strategy for controlling the interview process and ensuring that the union is getting its point across. Know the issue about which you are being interviewed. Concentrate on two or three points central to the union’s position.



## Leadership Tip: Press Releases and Media Advisories

- Create a headline that grabs the reporter’s attention
- Begin the news story with the essential information
- Keep it short
- Avoid jargon and technical terms
- Double check the facts
- Proofread
- Follow-up with the reporter

And refine your responses; have one concise quote (the local's "message") ready in advance that can be used in a news article or on radio or television.

## Developing a Message

Before reaching out to the media or responding to a request for comment, it is essential to know what points you would like to get across. A message can have national importance, or it can relate to a purely local issue. A well-crafted message will assist with media interactions.

Many issues pertaining to the government are complex or technical. These issues can comprise an alphabet soup of acronyms and jargon that may not be understood by the public or the media. Your local's message should use common language instead of acronyms and government speak.

Create messages that are compelling, clear, brief, and illustrate the relevance of an issue to the audience.

Before developing a message, ask yourself:

- What is the issue?
- What is the issue really about.
- What is AFGE's position?
- What is the agency/management/etc. position.
- Why is AFGE right in its position?
- Why is the opposition wrong in its position?
- Why should the public care about this issue?

Your message will be the basis for all comments to the media and themes for events on an issue. It is a good rule to develop three points consistent with the message and to be able to state it in 20 seconds or less, thereby becoming suitable for use as a sound bite. Rehearse the message until saying it becomes automatic. If it is awkward to say, rewrite it so that it can be stated more smoothly. Posing rhetorical questions can be a powerful yet subtle way to get a point across. "How is the public served by stripping defense workers of their whistleblower protections?"

## Planning a Media Event

Sponsoring an event can be an effective way of obtaining media coverage. Events are opportunities to dramatize issues and make them seem more newsworthy. Events also provide an opportunity to enroll the support of other organizations. Other unions and elected leaders can be natural allies on AFGE issues. Sometimes unlikely alliances can be forged, such as working with a local veterans' or seniors' group to fight the proposed closure of a government facility. Allies can contribute financial resources, people power, and expertise that will assist with the planning and hosting of an event. If you want to involve other groups, it is best to invite their participation early on in the planning process. At the beginning stages of planning of your event, you can reach out to AFGE's field mobilization experts in the Political Action department for pointers on how to make your event a success.

## Notifying the Media

If attempting to book a spokesperson on a local television or radio program, notify the media two



or three weeks in advance. Otherwise, notifying the media of the event two or three days prior should be sufficient. In general, you should:

- Email a copy of the media advisory for your event to the assignment editor or the news desk of the media outlet.
- Follow up the day of the event to firm up media attendance.
- With enough lead time, the AFGE Communications Department can assist with contacting local media on your behalf for your major campaigns and events.

### Day of Event

- Reconfirm roles with participants and volunteers.
- Have a press packet on site that includes the advisory, list of speakers with title, press release, information on the local, etc.
- Designate a volunteer to greet the press when they arrive and introduce the press to spokespersons.
- Be sure to have all needed items prior to start, including signs, buttons, bottled water, umbrellas.
- Have someone onsite who will take photos of the day's actions. You can then send those

images to your district and the national office for inclusion in various communication platforms. This will also be great content for your local's website, newsletter, flyers, and/or social media pages.

- Don't forget to have fun!

### After the Event

- Follow up the event and media coverage with letters to the editor, a press release, or attempts to book a guest on a local radio or TV program. At times the media may cover an event based on an advisory or press release, rather than sending a reporter onsite.
- A day or two after your event, take some time to look at local news sites and search engines to locate published stories about your action. Collect these news clips and send them around to your members. These can be included in an event wrap-up that you send to your stakeholders.
- Finally, don't take a lack of coverage personally. Sometimes the best planned and implemented events don't get any coverage at all. The news is unpredictable; developments beyond your control can rob your event of media coverage. With persistence, the media will cover your issue.





## Leadership Tip: Reaching Out to the Media

- **Contact the AFGE Communications Department.** Use the AFGE Communications Department as your partner in reaching out to the press. We have the tools to develop a core media list of reporters for use in distributing press releases. We can also tailor media lists to include local radio and TV, daily and weekly newspapers, and wire services such as AP and Reuters.
- **Keep it Honest.** Answer reporter questions with information you know to be true. This will strengthen your integrity and credibility among the press and your audiences. If you can't answer a question, tell them you will get back to them – and make sure you do.
- **Steer Clear of Unfamiliar Terms or Jargon.** Acronyms and jargon sound like a foreign language to reporters. Use terms that are easy to understand and create connection with people.
- **Always Return a Reporter's Phone Calls.** Provide them with a resource if you can't answer a question.
- **Meet Reporters' Deadlines.** The newspaper has to get to the printer and the TV or radio show has to air. If something big is happening in the news, make yourself available at deadline time and the union may get the full story.
- **Package Your News for Maximum Impact.** In the news media, drama sells. Include human interest stories, poignant anecdotes, and compelling individuals and their testimonials. Pick a setting that visually demonstrates the content of your message.
- **Personalize Your Story.** As much as possible, personalize your story to the media. It gives people a way to connect to the issue.
- **Nothing is Off the Record.** Assume everything you say will be quoted. Don't say anything you don't want to see on TV or read in the newspaper. When in doubt, don't say it. If you wish to provide information to a reporter without being cited as the source, state your intentions at the beginning of the conversation. Be clear that your conversation is "not for attribution of any kind," otherwise your comments could be attributed to "an anonymous union official" or identified in a way that could point to you as the source of information. Don't say anything that could even remotely be construed as off-color, racist, sexist, homophobic, transphobic, ableist, or otherwise exclusionary of the people we represent in our communities.
- **Never Say "No Comment."** Saying "no comment" will imply guilt or confirm accusations, despite your intentions. Instead, deflect the question by promising that information will be forthcoming (and actually provide the information at a later time), comment on a related issue, or say nothing at all.
- **Keep Your Message Positive.** If asked a question such as, "Aren't you just trying to protect the jobs of your members," answer on a positive note that keeps in line with your message. A possible response could be, "AFGE fights to ensure that Americans get the services they deserve from their government."
- **Don't Take it Personally.** Sometimes you won't get any media coverage despite your best efforts. Sometimes a reporter may write story in a way that you find unfavorable. Generally, reporters act as professionals. The next time around, the reporter may cover your issue in a way you find more favorable.



## Leadership Tip: Event Roles and Considerations

- Spokesperson(s)
- Writing media advisory
- Pitching event to media
- Emcee
- Marshals
- Props
- Greeter for the media
- Supplies (bottled water, ponchos, etc.)
- Alternate site
- Necessary permits
- Competing events

### Chapter Review Questions:

1. What three elements should your local consider when planning a communications strategy?
2. What are various ways your local can use to communicate with members? With the community? Which techniques do you think work best for your local/bargaining unit employees/community?
3. Why is developing a strategic communications strategy important at a local level?
4. Name at least four best practices for your local newsletter.

# Chapter 18: Promoting Civil, Human, Women’s, and Workers’ Rights



# Promoting Civil, Human, Women’s, and Workers’ Rights

## Learning Objectives:

- Describe the purpose and duties of the AFGE Human Rights Committee and Local Women’s Coordinators/Local Fair Practices Coordinators
- Describe the subjects addressed by the national Women’s and Fair Practices, HRC, LWCs, and LFPCs, and how they can be addressed through contract bargaining

## Women’s and Fair Practices

The Women’s and Fair Practices Departments are two operational departments that work collectively to address civil, human, women’s and workers’ rights issues in the Federal and D.C. governments and within AFGE. The primary objective of the Women’s Department is to ensure that agency and AFGE policies and procedures are free from the artificial barriers to the progress of women and working families in the workplace. The Fair Practices Department is charged with working to eliminate discrimination in the Federal and DC Governments and within AFGE through representation and education.

## Human Rights Committee

To accomplish its program goals of education and training, member mobilization and legal representation, the Departments work with AFGE’s Human Rights Committee (HRC), a 24 member advisory board, the HRC is comprised of 12 National Women’s Advisory Coordinators (NWAC), and 12 National Fair Practices Affirmative Action Coordinators (NFPAAC), who are elected at District Caucus meetings every three years. The Committee’s mission is to educate, assist, and empower our members in achieving justice, diversity, equality, and harmony. National Advisory and National Fair Practices Affirmative Action Coordinators and National Women’s Coordinators monitor trends in women’s and working family issues. Specific issues include childcare, gender-based wage discrimination, sexual

harassment, alternative work schedules, upward mobility, career development, family friendly leave policies, health and safety matters, and leadership skills development.

The District Fair Practices Coordinators represent members on EEO issues, and they monitor trends in EEO laws and regulations. Both the Women’s and Fair Practices District Coordinators assist locals with training and mobilization efforts in their respective districts.

## Local Women’s and Fair Practices Coordinators

Part of the responsibility of local union officers is to integrate the local union into AFGE’s Coordinators Network by appointing or electing Local Women’s and Fair Practices Coordinators.

The Local Women’s Coordinator (LWC) addresses issues that have an adverse impact on women in the workforce. The main objective of the LWC is to advocate for the rights of AFGE members and to ensure that the agency maintains policies and practices that support working families and women’s progress in the workplace.

The Local Fair Practices Coordinator’s (LFPC) advocates for Equal Employment Opportunity and Affirmative Action in the workplace. Their primary role is to provide direct assistance and/or counseling to members with inquiries or complaints



of discrimination. Both coordinators are involved in mobilizing members in grassroots efforts in support of legislative and agency practices that advance human, civil, women's and workers' rights.

#### Specific duties of Local Women's and Fair Practices Coordinators include:

- Advising local union officials on issues that impact women and minorities.
- Mobilizing and recruiting members around civil rights and women's issues.
- Counseling union members on problems that adversely affect employment.
- Informing the local and National Union on the status of women/minorities in the government agencies within their jurisdiction.
- Advising and assisting local officers in contract negotiations and contract language affecting women and minorities.
- Representing members with EEO discrimination complaints before the EEOC, the MSPB, or in arbitration.
- Examining the Agency's Affirmative Employment Plan (AEP) and publicizing failures to meet plan goals.
- Assisting locals in developing their strategic plans for advancing civil, human, women's and workers' rights.
- Chairing the Local Women's and Fair Practices Committees and recruiting members to serve.
- Writing articles for local newsletters.



### Leadership Tip: Establishing a Local Women's and Fair Practices Committee

An excellent tool for increasing the visibility of civil, human, women's and workers' rights in your local is to establish a Women's and/or Fair Practices Committee in the local. Here's how:

- Review your Constitution/Bylaws. Who appoints committees? How can you assure participation of all areas, occupations, etc.?
- Talk to the leadership and get their support for the committee. Stress that the purpose is to build the union.
- Talk to co-workers about issues and the idea of establishing a committee.
- Elect or appoint a Committee Chair.
- Recruit Committee members.
- Hold the first meeting and explain the purpose and how often the committee will meet.
- Conduct a survey of the membership.
- Set priorities and determine goals.
- Begin planning a local program.



## Negotiating Contract Language to Promote Women’s Rights and Fair Practices

To improve human rights at work, it is critical to have a Collective Bargaining Agreement (CBA) that contains language that will promote civil rights and the rights of women and working families. Clear, strong, and precise contract language is the most important and effective avenue to equality for all employees. The government’s personnel laws, rules, and regulations do not provide sufficient protection for employees. Through strong collective bargaining, the union can increase and strengthen employee rights. Effective contract language on the following subjects can help ensure equal treatment for all government employees:

- Discrimination
- Pay equity
- Training and promotion
- Leave policies
- Sexual harassment
- Nursing Mothers and Child care
- Reasonable accommodations
- Sexual orientation



## Represents Members Well

One of the most important functions of a union is to ensure that all members (and bargaining unit employees) are treated fairly, and not discriminated against by management or peers due to race/ethnicity, gender or gender identity, religion, sexual orientation, or age.

By ensuring that your local union is well versed in issues of discrimination and fair practices, you’re helping to represent all your members and ensure that they are treated fairly both by the employer and by the Agency. By fighting for members when issues of discrimination arise, we help to make the workplace more welcoming for all people. By training members to recognize how discrimination can come into play, we also help to create a union environment that is safe and welcoming for all members.

The National Women’s and Fair Practices Departments have sample contract language to help AFGE locals negotiate for equality and fair treatment in the workplace. Log on to the AFGE web site at [www.afge.org](http://www.afge.org), look under the “Leaders & Activists” tab and click on “Women’s and Fair Practices” for resources and information.



## Working with Coalitions to Promote Workplace Equality

There are several workers' rights advocacy groups that are affiliated with the AFL-CIO that AFGE leaders and activists can join to increase our power in winning fair treatment at work. Some of these groups include:

### **A. Phillip Randolph Institute (APRI)**

815 16th St. NW  
Washington, D.C. 20006  
(202) 507-3810

### **Asian Pacific American Labor Alliance (APALA)**

815 16th St. NW  
Washington, DC 20006  
(202) 508-3733

### **Coalition of Labor Union Women (CLUW)**

815 16th St. NW  
Washington, DC 20006  
(202) 508-6969

### **Coalition of Black Trade Unionists (CBTU)**

1625 L St. NW  
Washington, DC 20036  
(202) 429-1203

### **Labor Council for Latin American Advancement (LCLAA)**

815 16th Street, NW, #4  
Washington, DC 20006  
(202) 508-6919

### **Pride at Work (PAW)**

815 16th St. NW  
Washington, DC 20006  
(202) 637-5014

## Education and Training for Equal Rights Advocates

Every year, except convention year, AFGE's National Women's and Fair Practices Departments host Diversity Week. Included in Diversity Week is the Y.O.U.N.G. AFGE Training Summit, the Human Rights Training Conference, AFGE Pride and LGBT Leadership training and Basic, Intermediate and Advanced EEO training for local and District EEO practitioners and union activists. These skills based trainings cover a wide range of civil, human, women's and workers' rights. Additional training is offered through District, Regional and Bargaining Council Trainings. For information on training opportunities, contact your District Office or the National Women's and Fair Practices Departments.

In addition to hosting trainings, the National Women's and Fair Practices Departments publish several manuals to include: The Handbook for Women's and Fair Practices Coordinators; AFGE's Guides on Fighting Discrimination, Disability Rights, Sexual Harassment, Family Friendly/Family Medical Leave, and Domestic Violence Awareness.

### Chapter Review Questions:

1. List the kinds of issues that Women's and Fair Practices departments advocate for.
2. How can the local use collective bargaining to work for more equal treatment for employees?
3. Why is it so important for AFGE to advocate for these issues, at the local, district, and national levels?



# Chapter 19: AFGE History



# AFGE History

For nearly two centuries, government employees have organized into labor unions to fight for dignity, respect, and an improved standard of living for working families. The White House, Congress, Office of Personnel Management, and our government agencies have never “given” government employees improved working conditions without a fight.

From 1830 to 1862, Navy shipyard workers and government printers mobilized and waged strikes against their employers to shorten the work day for unionized federal workers from 12-14 hours to 10 hours and finally 8 hours. These early federal workers fought for comparable pay and for the establishment of the U.S. Civil Service Commission.

In 1912, Congress enacted a law which officially recognized the right of federal workers to organize but banned federal worker strikes. In 1917, the American Federation of Labor (AFL) granted a charter to a newly formed government employees union, the forerunner of the AFGE. Between 1918 and 1931, government employee unions won gains in collective bargaining rights for unionized government printing, limits on Sunday work hours, and the passage of the first federal retirement law. In 1932, government workers reorganized themselves into the American Federation of Government Employees.

For nearly 100 years, AFGE has been in the forefront of government employees’ struggles for a living wage, paid health care and retirement, union rights, fair treatment, child care and education subsidies, flexible work schedules and political freedoms.

**Take pride in our AFGE history and take part in making AFGE history, today.**

## 1932 - 1952

AFGE is chartered on August 18, 1932.

AFGE fights for the Thomas Amendment which establishes a 40-hour work week and overtime for wage board employees.

In 1935, Congress passes the Wagner Act which gives private sector workers the right to organize and bargain collectively, and to engage in collective actions, including strikes, in support of these rights.

AFGE fights for sick leave and 26 days of annual leave for government workers.

AFGE membership grows to 25,000 in 1937.

AFGE fights to extend civil service status to 130,000 government employees bringing retirement rights to most federal workers. AFGE succeeds in reducing age limits for optional retirement.

In 1939, Congress passes the Hatch Act, severely limiting government workers’ political activities.

AFL and AFGE advocate a 5-hour, 35-hour work week for government employees with a minimum annual wage of \$1,500.

AFGE membership grows to 28,000 in 1941.

Government freezes employee wages during WWII. By end of war, pay gap between private and government sector workers is 15%.

In 1945, AFGE successfully lobbies for Federal Employees Pay Act, which increases classified salaries by 15.9% and provides payment for overtime, night, and holiday work.

In 1947, Taft-Hartley Act amends Wagner Act and bans public employee strikes.

AFGE secures 11 percent pay increase for government workers.

President Truman signs HR6454, which permits 20-year retirement for certain officers and employees who do hazardous work, including prison guards.

## 1952 - 1972

AFGE membership grows to 61,000 in 1952.

In 1952, AFL and Congress of Industrial Organizations merge into the AFL-CIO.

AFGE and the AFL-CIO work to overhaul government retirement laws, providing retirement at 55 years of age with 30 years of service. Assures nearly all government employees a 20% increase in their basic retirement annuity.

In 1956, General Printing Office (GPO) craft employees are the first group of federal workers to be granted a shorter work week without reduction of pay. This brings pay and hours in line with private print shop workers.

AFGE secures enactment of Health Benefits Act authorizing federal government to pay part of health insurance plans.

In 1959, AFGE wins fight to end inequities in granting holidays to government employees— provides eight paid holidays a year regardless of work schedule or day of week in which holiday falls.

AFGE membership grows to 83,000 in 1961.

In 1962 AFGE fights for President Kennedy's EO10988 which establishes exclusive recognition and bargaining rights to unions in the federal government. Membership jumps 159%.

Federal Salary Reform Act increases salaries and establishes a new principle of comparability between government and private industry wages. Includes 8-hour overtime law for wage board workers.

## 1972 - 1982

AFGE successfully lobbies for the Wage Grade Act, giving government blue-collar workers representation in wage setting-decisions. Congress passes Federal Pay Comparability Act giving government unions representation in monitoring the data and decision

making used to set annual pay adjustments for comparability.

President Nixon issues EO11491, which establishes formal collective bargaining in the federal government.

In 1974, AFGE votes to create a Women's Department to advance women's leadership roles in the union.

AFGE fights for employee protections in the Civil Service Reform Act of 1978, including the Federal Labor Relations Authority (FLRA), the Merit Systems Protections Board (MSPB) to protect whistleblowers, and extending the Occupational Safety and Health Act (OSHA) coverage to government workers.

In 1979, AFGE spearheads effort to create collective bargaining for D.C. workers, which includes bargaining for pay and benefits.

In 1980, AFGE Convention delegates vote to make the Women's Department Director a member of the National Executive Council (NEC).

Over 6,000 AFGE members march along with half a million other labor union members on Solidarity Day 1981.

In 1981, President Reagan fires air traffic controllers in Air Traffic Controllers Strike. Professional Air Traffic Controllers Association (PATCO) leaders are jailed as Reagan declares war on government workers.

In 1982, AFGE signs its first national agreements with Social Security Administration (SSA) covering 60,000 SSA employees and the Department of Veterans' Administration (DVA), covering 125,000 DVA employees.

## 1982 – 1992

AFGE launches campaign to cleanup federal prisons after several AFGE prison guards are killed and assaulted.

In 1985, AFGE wins \$3.75 million class action suit against Warner Robinson on behalf of thousands of African-American workers discriminated against in hiring and promotions. Two hundred and forty members of the class receive promotions.

AFGE helps save government retirement benefits through the creation of the Federal Employees Retirement System in 1986.

In 1986, President Reagan issues EO requiring random drug testing of government workers. AFGE defeats initiative through its “Don’t Piss on Me” campaign.

AFGE launches “Lunch and Learn” program for government workers to talk with union organizers.

Four thousand AFGE activists come to Washington, DC in 1986 to draw up a “Government Employee Bill of Rights” as part of the union’s “Unity is Power” campaign.

AFGE argues successfully in Supreme Court against law banning government workers from receiving income for off-duty activities unrelated to their jobs.

Gram-Rudman-Hollings balanced budget law passes in 1986. Law immediately rescinds Cost of Living Adjustments (COLAs) for government workers. In 1987, President Reagan proposes eliminating 20,000 government jobs. General Services Administration (GSA) seeks to contract outwork to meet its staffing cuts.

AFGE wins first preliminary injunction against government employee drug testing at Fort Stewart, Georgia.

U.S. Court of Appeals agrees with AFGE that Hatch Act cannot be used to restrict public speech of government employees unless there is a connection between the statement and a political candidate or activity.

AFGE conducts “Quality of Public Service Survey” to SSA workers nationwide regarding the effects of working conditions on public service. 80% cite staffing shortages as primary cause of excessive back logs, and poor customer service.

In 1990, AFGE’s NEC establishes a Health and Safety Committee to monitor workplace problems and advocate legislation providing full OSHA coverage for government employees.

AFGE negotiates joint labor management project with McClellan Air Force Base making AFGE an equal partner with management in determining

productivity, compensation, and quality of work life.

In 1991, AFGE pushes President Bush to sign FEPCA, establishing locality pay to close the 30% pay gap between government and private sectors. President Clinton subsequently rejects FEPCA pay formula and refuses to follow its mandates.

AFGE helps draft legislation to amend the 1991 Civil Rights Act, which, for the first time, brings the right of jury trial and compensatory damages to government employees who fall victim to unlawful discrimination.

Congress passes AFGE-backed provisions in Defense Authorization Bill to aid DoD workers facing job cuts including employee buyout payments of up to \$25,000, continued health care coverage, a minimum 60-day Reduction in Force (RIF) notice and job training.

AFGE holds its first Firefighter Seminar focusing on employment issues for both firefighters and chiefs. AFGE Firefighter Manuals become the standard practice guides for firefighters, chiefs, and human resources and labor relations specialists.

## 1992 – 2000

AFGE plays key role in “Reinventing Government” initiative by recommending labor management partnerships with executive branch employees. In 1993, President Clinton signs EO12871 creating the National Partnership Council with four labor members and representatives from each cabinet department.

In 1993, Hatch Act Reform provides government workers many of the same rights as other Americans to participate in political activities.

AFGE membership grows to 171,000 in 1994.

AFGE and Veterans Benefits Administration enter into settlement agreement in which employees in 15 positions are awarded over \$15 million in back pay.

AFGE launches Metropolitan Empowerment Initiatives (Metros) to develop membership drives in areas where government agencies and workers are highly concentrated. Campaign yields 10,000 new members by 1996.



AFGE holds its first Human Rights Conference.

1995 bombing of Oklahoma City Federal Building kills 168 people, including scores of AFGE members. AFGE sets up the "Fund for Emergency Disaster Support, Inc." (FEDS), to bring relief to government workers hit by natural or man-made disasters. AFGE begins immediate campaign to improve security in government installations.

In 1995, 800,000 federal workers are locked out, losing over 50 days of work, as the result of congressional budget battles over cuts in retirement and health benefits for government workers.

AFGE membership grows to 176,000 in 1996.

In 1997, AFGE's agreement with Hughes Aircraft prohibits contracting, for the first time, and includes "successor" clause to ensure union recognition by a new owner.

**[www.afge.org](http://www.afge.org)** debuts on the web in 1997.

In 1997, AFGE wins a \$30 million recovery in lost overtime pay at for SSA workers—the largest Fair Labor Standards Act (FLSA) win in the federal sector.

AFGE issues "white paper" on state of labor relations within the BoP, citing 14 examples of alleged management abuse of the disciplinary process. NEC initiates a joint Prisons Council Task Force to revitalize partnership activities and improve working conditions and labor management relations in the BoP.

In 1998, AFGE defeats wholesale privatization of DoD. AFGE defeats contractor backed "Freedom from Government Competition Act" and replaces it with the Federal Activities Inventory Review Act (FAIR) (A-76) which codifies existing government regulations.

AFGE wins decade-long pay fight for government firefighters. 10,000 firefighters receive a 10% pay adjustment in addition to their regular pay increase.

D.C. Control Board voids labor agreement with D.C. employees. AFGE files successful lawsuit restoring back pay and collective bargaining rights to D.C. Government employees. New contract increases pay and bargaining protections.

AFGE successfully pushes for pilot program in 1998 to provide child care subsidies for low-wage government

workers. Negotiates agreements at DOL, OPM, and GSA which provide up to a 30% child care subsidy to eligible employees.

Union membership grows to 186,000 in 1998.

AFGE holds second seminar on firefighter employment issues. Congress passes AFGE-drafted Firefighter Pay Bill, creating fair method for calculating firefighter pay.

In 1999, AFGE derails proposals to privatize Social Security. Launches grass roots campaign, Stop Wasting America's Money on Privatization (SWAMP), to urge Congress to suspend further government contracting until true costs of privatization are assessed.

AFGE pushes President Clinton to expand the use of sick leave for government employees who need to care for seriously ill family members.

AFGE reaches agreement with GSA to cancel its decision to close its eight remaining federal supply warehouses saving jobs for 2000 GSA workers.

AFGE organizes 6,000 new members during 40 METROs. Holds its first Organizing Institute. Membership reaches over 190,000 in 1999.

In 1999, AFGE wins three U.S. Supreme Court cases which: (1) enables Equal Employment Opportunity Commission (EEOC) to order government agencies to pay compensatory damages in discrimination cases; (2) wins the right for government workers to have a union representative present during questioning by the OIG; and (3) upholds AFGE's right to initiate mid-term bargaining.

AFGE holds its first blue collar pay conference to plan long term strategies to improve blue collar pay for government employees. "Vision1999 Conference" is convened to design AFGE's organizing growth strategy. Planning conference for AFGE professionals is also held. Nearly 2000 DVA professionals join AFGE.

In 1999, AFGE files lawsuit in U.S. District Court to order USDA to use federal inspectors, not industry representatives, to conduct meat and poultry inspections.

AFGE's grassroots campaign forces Congress and the President to provide largest pay raise to government

employees since 1980.

AFGE successfully fights to retain employee benefits for paid eye exam and eyeglasses in Master Agreement with SSA.

## 2000 - 2001

In 2000, AFGE lobbies Congress to take away the discretion of Department of DVA Medical Directors to deny nurses an annual pay raise. Legislation guarantees that DVA nurses and other health care workers receive the same increase GS workers receive, plus locality pay.

Hundreds of AFGE members participate in creation of an AFGE memorial quilt honoring AFGE members who lost their lives in the 1995 Oklahoma City bombing.

Membership grows to nearly 200,000 in 2000. Five additional professional units are added to AFGE's DVA unit.

In 2000, the AFGE-supported Truthfulness, Responsibility, and Accountability in Contracting (TRAC) Act is introduced in Congress and in the D.C. government.

At DoD, AFGE establishes the most systematic Congressional reporting requirements for contracting and downsizing of any government agency. AFGE blocks privatization attempt of government owned Hydroelectric Power Plant at Sault Ste. Marie, Michigan.

U.S. Court of Appeals rules in favor of AFGE's 5300 federal food inspectors stating that the law requires food inspections to be conducted by federal inspectors, not private industry.

Agencies required, for first time, to report formally on their progress in opening up the decision making process to union workers.

President Clinton directs DHSS and GSA to develop guidelines on the use of Automated External Defibrillators (AEDs) in government buildings to prevent deaths of workers by cardiac arrest.

GAO report on Competitive Contracting adopts AFGE position that contractors should be held to the same

scrutiny as government employees.

In 2000, AFGE and Veterans Benefits Administration enter into settlement agreement for Computer Specialists for \$1 million in back pay. Prison employees receive \$120 million in back pay in historic AFGE and BoP settlement.

In 2001, after a 10 year struggle, OSHA issues ergonomics standards. Bush Administration repeals standard in March. In 2001, President Bush revokes the National Partnership Council.

AFGE wins Saturday premium pay for DVA health care workers. Law requires DVA to establish safe staffing levels and improve retirement benefits.

In 2001, AFGE negotiates permanent child care subsidies for low income government employees. 15 federal agencies participate.

On September 11, 2001, almost 3,000 people (one-third who are union members), lose their lives in attacks on the Pentagon and World Trade Center. Six AFGE locals are directly affected by the attacks. Nearly 10,000 union workers lose their jobs as a result of the tragedy.

AFGE wins fight to have airport screening performed by experienced government employees in the newly formed Transportation Services Administration (TSA).

AFGE leads national effort to fight prison privatization through involvement in the Public Safety and Justice Campaign.

AFGE fights to overturn EO requiring contractors to post notices that people in the private sector don't have to join a union. Bush issues a second EO to eliminate requirement that workers on government projects receive union negotiated wages.

## 2002 - 2003

President Bush issues EO13252 that denies union representation to more than 1,000 DOJ employees due to national security concerns.

NEC votes to organize the 40,000 employees of the newly formed TSA which is charged with providing security at America's airports.

President Bush announces plans to consolidate 22 federal agencies into the Homeland Security Department and take away union rights.

AFGE launches campaign, “Our Best Homeland Security-Federal Employees,” to preserve job protections.

AFGE successfully lobbies Congress to reject President’s Bush 2.6% pay proposal for government employees and pass a 4.1% increase.

AFGE wins \$75,000 in back pay for government employees at the National Cemetery Administration.

AFGE active membership reaches 200,000 in 2002.

In 2002, AFGE celebrates 70th birthday. Holds National Leadership Meeting to set strategic goals in organizing, legislation and political action, representation, communications, and leadership development.

AFGE charters nationwide local to represent employees of the Transportation Security Administration.

AFGE Delegates elect a new national President, John Gage.

Department of Homeland Security unveils new personnel plan which sharply reduces workers rights and introduces pay for performance across the Agency.

## 2004 - 2007

DoD authorization includes plan to revamp the Agency’s personnel system. The new system, National Security Personnel System mimics the DHS proposal.

AFGE endorses John Kerry for President. George Bush wins re-election.

AFGE members in Louisiana and Mississippi are hard hit by one of the worst hurricanes on record, Hurricane Katrina.

AFGE National President John Gage and National Vice President Andrea Brooks are appointed to the AFL-CIO Executive Council.

AFGE launches Cell Phones for Soldiers Pilot Program

in an effort to support U.S. troops overseas.

AFGE wins FLRA decision affirming union representation for USDA food and import inspectors. AFGE successfully challenged a USDA declaration that import inspectors are no longer eligible for union representation due to alleged national security needs.

FLRA orders union election for up to 20,000 CBP employees in the Department of Homeland Security. Employees will choose between AFGE and NTEU for union representation.

AFGE wins decisive ruling against DOD personnel rules. Federal judge finds that the labor relations provisions of the NSPS run counter to the intent of the laws governing union rights in federal and D.C. workplaces.

John Gage is re-elected National President of AFGE. J. David Cox is elected Secretary-Treasurer and Andrea Brooks is re-elected National Vice President of Women’s and Fair Practices.

## 2008 - 2016

In 2008, Barack Obama is elected the first African-American president in U.S. history.

AFGE pulls together to beat back NSPS (the National Security Personnel System), MAX HR, and A-76 contracting out.

In 2011, 45,000 TSA officers are welcomed into the AFGE family, as AFGE continues to fight for TSA officers to have the same bargaining rights as other federal employees.

Working with the Obama administration, AFGE launches the Safe Prisons Project to make prisons safer for correctional officers.

At the 2012 National Convention, J. David Cox is elected National President of AFGE, Eugene Hudson Jr. is elected National Secretary/Treasurer, and Augusta Y. Thomas is re-elected National Vice President of Women’s and Fair Practices.

In 2013, AFGE brings together over 700 leaders from across the union to create a new vision for our union to move forward. The resulting plan – “Big Enough

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to Win” – is soon launched across the Federation to organize more members, strengthen every local, increase our profile on Capitol Hill, and educate federal employees on the issues we fight for. These efforts lead to AFGE reaching a record 300,000 members in late 2015.

# APPENDICES

*Appendix items to include:*

## **Important Forms:**

- 1187 Membership Form
- PAC Form

## **Tools for Strategic Planning:**

- Strategic plan template
- Organizing plan template
- New employee orientation checklist
- Mentoring Program ("Each One Teach One") information and contacts
- Local officer
- Sample budget items and calculations

## **Other Resources:**

- List of internet resources/links and AFGE, DOL, and IRS links and contacts (including The Statute, LMRDA, and The Standard)
- Examples of:
  1. Expense voucher
  2. Information request
  3. Grievance
  4. Budget report
  5. Form 41 Audit Report
- Communications dept. supplement
- How-To access/login to:
  1. AFGE LMS (Learning Management System)
  2. MyAFGE

A. Big Enough To Win: 6 Pages Trifold



# AFGE: BIG ENOUGH TO WIN



**A Guide for AFGE Activists on  
How to Implement a Winning Strategy**



# AFGE Strategy

*(Crafted during the Leadership Conference, September 2013)*

## Vision

To ensure justice, equality, fairness and dignity for workers and their families through a vibrant labor movement as the premier union for workers in government service

## Mission

To build a large, powerful, effective union for workers in government service

## Core Values

- AFGE is a **Community** of workers dedicated to improving the quality of life for all Americans and their families
- It is our right to **Justice, Equality and Dignity**
- We must be **Accountable** to our members and the public we serve
- We **Adapt** to succeed in our changing environment
- We determine our future through **Collective Action** and coalition building
- **Democracy** is the cornerstone of AFGE
- **Diversity** and **Inclusion** are reflected throughout AFGE
- **Integrity, Honesty and Service** guide our path
- **Advocacy** for government workers
- To **Join a Union and Bargain Collectively** are basic human rights
- **Solidarity** with the global Labor Movement, AFL-CIO and organizations with shared values

## Guiding Principles

- Build on the power of the union
- Engage new leaders
- Energize and activate current members
- Energize and activate potential members

## Strategic Objectives

- Organizing
- Legislative Mobilization
- Political Influence
- Strong Local Unions
- Education/Communication

## Strategic Goals for Locals

### • Organizing

- o Join and support Central Labor Councils; start a “Community Strong” project with other non-profits
- o Budget and send selected officers to an Organizing Institute; find ways to attract people to help organize; use OI graduates to organize and train others back home
- o Pay Bonus Bucks rebates up front and request reimbursement after the drive; sponsor more Lunch & Learns
- o Set a specific goal of increasing membership each year with a plan for year-round organizing

### • Legislative Mobilization

- o Set up a Local Legislative Team; produce monthly updates on legislative issues; invite local Congressional staff to committee training; hold specific legislative meetings with members
- o Set up a Twitter account and tweet regularly; set up a social media committee; use YOUNG members to “Mentor Up”
- o Communicate to members through an AFGE App and measure member installs (how many are using the app)
- o Participate in at least one Congressional visit; ask members to send letters to Congress about important legislative issues; turn out at meetings, rallies and on the Hill when called on

### • Political Influence

- o Achieve a short-term dramatic increase in contributions to PAC through solicitation done off duty and off government property
- o Learn how to explain “why PAC, why now” and how to make a contribution at meetings done off duty and off government property
- o Designate stewards/officers for voter registration; train volunteers to participate in voter awareness campaigns
- o Do not discuss political activity or solicit for the AFGE PAC at the worksite.

### • Stronger Local Unions

- o Participate in AFL-CIO Central Labor Councils; organize charity work; meet with religious leaders in the community; hold community social events to increase AFGE’s outreach and influence
- o Target, attract and prepare a new generation of YOUNG members to develop and sustain union leadership; hold informal gatherings with younger union members; arrange for younger activists to “shadow” seasoned union representatives; use social media and text communication to personalize invitations to YOUNG events
- o Adopt a bylaw that all officers and stewards will be trained in their respective positions; make use of online and classroom training by a labor-accredited college; regularly review training and provide feedback; make use of tiered OJT (on-the-job) training for stewards and others

### • Education & Communication

- o Change AFGE image through ongoing “I Am AFGE” campaign; post short videos to Facebook, Twitter, Tumblr and other social media
- o Provide funding for promotional AFGE spots on local TV and radio
- o Coordinate with the Working America and the AARP “Mentor Up” campaigns
- o Budget for and send more folks to training; take advantage of Web-based training offered by AFGE National.



## K. Local: Budget Calculator

### Local Budgets

All locals are responsible for preparing a yearly budget. The budget should be estimated in terms of realistic expenditures and developed so that these estimates do not exceed your revenue for the year. The local has no authority to spend money absent the approval of the membership, and the budget is the primary means of obtaining and documenting this approval as required by the Department of Labor (DOL).

Training for local officers should be a standard item in your budget, since it is crucial that local officers know the most efficient and proper ways of managing the local in accordance with current laws and policies. Representational costs such as those for arbitration must be part of your budget. You should plan for local participation in such events as District meetings, Legislative Conference, Council events if applicable, the Human Rights Conference, etc. Funds must be designated for organizing activities and other local activities. There should be a contingency fund for unexpected costs, such as rallies, AFL-CIO functions, unforeseen expenses, etc.

District Caucuses and National Conventions take place every three years (not in the same year). The cost for attending these can be significant and thus 1/3 of the expected cost should be set aside each year, to ensure the local does not have to absorb all the cost in one year.

Once the budget is approved by the local membership, a copy should be forwarded to the District Office through your NR.

Locals are reminded that expenditures of local funds cannot be made without a vote of approval by the membership, unless stipulated in the Local Constitution or by-laws, or within the approved budget. In accordance with the National Constitution, the local Executive Board is permitted to spend up to \$500 between membership meetings. This is meant to cover expenditures that are both necessary and unforeseen (thus not covered by the local's annual budget). All expenditures authorized by the Executive Board must be reported in writing at the next regular meeting of the local.

**NOTE:** Locals are reminded that membership dues, per pay period, should equal the monthly per capita tax that you are charged for each member. In 2016, if you are an Insured Local, your dues should be at least \$21.96 per pay period and \$2.55 per member per month for retired members, and \$20.91 for Non-Insured Locals and \$1.50 per member per month for retired members. This allows the local sufficient funds to cover operating costs in order to serve its members appropriately.

## Local Budget Template:

AFGE LOCAL \_\_\_\_\_ / COUNCIL # \_\_\_\_\_, DISTRICT # \_\_\_\_\_

ANNUAL BUDGET FOR YEAR \_\_\_\_\_

PERIOD COVERED: \_\_\_\_\_

### CASH ON HAND:

Cash on hand (balance brought forward from previous year) \$ \_\_\_\_\_  
Checking account: \$ \_\_\_\_\_  
Savings account: \$ \_\_\_\_\_

### PROJECTED REVENUE:

\_\_\_\_\_ Members on dues withholding  
\$ \_\_\_\_\_ per pay period X 26 pay periods = \$ \_\_\_\_\_  
\_\_\_\_\_ Direct pay active  
\$ \_\_\_\_\_ per pay period X 26 pay periods = \$ \_\_\_\_\_  
\_\_\_\_\_ Retirees  
\$ \_\_\_\_\_ annually \$ \_\_\_\_\_  
**SUB TOTAL** \$ \_\_\_\_\_

### OTHER SOURCES OF INCOME:

**Other** \$ \_\_\_\_\_  
**SUB TOTAL** \$ \_\_\_\_\_  
**TOTAL PROJECTED REVENUE:** \$ \_\_\_\_\_

**EXPENSES:**

Per capita tax to AFGE

\_\_\_\_\_ Active members X \$\_\_\_\_\_ X 12 = \$\_\_\_\_\_

\_\_\_\_\_ Retired members X \$\_\_\_\_\_ X 12 = \$\_\_\_\_\_

Council per capita tax:

\_\_\_\_\_ members X \$\_\_\_\_\_ X 12 = \$\_\_\_\_\_

Affiliation fees – central bodies

\$\_\_\_\_\_

\_\_\_\_\_ Council # \_\_\_\_\_ Members X \$\_\_\_\_\_ X 12 = \$\_\_\_\_\_

**SUB TOTAL** \$\_\_\_\_\_

**OTHER PROJECTED EXPENSES**

Arbitrations \$\_\_\_\_\_

Other \$\_\_\_\_\_

**CAUCUS/CONVENTION, DISTRICT CAUCUS/MEETING**

Delegates/total estimated cost: \$\_\_\_\_\_

Alternates 1/3 budget amount: \$\_\_\_\_\_

**National Convention**

Delegates/total estimated cost: \$\_\_\_\_\_

Alternates 1/3 budget amount: \$\_\_\_\_\_

**Council Convention Meeting**

Delegates/total estimated cost: \$\_\_\_\_\_

Alternate 1/3 budget amount: \$\_\_\_\_\_

**TRAINING – COUNCIL, LOCAL, OFFICER, ETC.**

\$\_\_\_\_\_

i.e.: New Officers, President Training,  
Secretary/Treasurer Training, Steward Training, etc.

**SUB TOTAL** \$\_\_\_\_\_

**LOCAL PARTICIPATION**

Legislative Conference: \$\_\_\_\_\_

Congressional Breakfast:	\$ _____
AFL-CIO Convention Conference:	\$ _____
<b>SUB TOTAL</b>	<b>\$ _____</b>

**REIMBURSED EXPENSES FOR LOCAL OFFICERS**

Travel:	\$ _____
Meals:	\$ _____
Lodging:	\$ _____
Miscellaneous:	\$ _____
<b>SUB TOTAL</b>	<b>\$ _____</b>

**COMMUNICATIONS**

Newsletter printing/Xeroxing:	\$ _____
Postage for newsletter:	\$ _____
Other related costs:	\$ _____
<b>SUB TOTAL</b>	<b>\$ _____</b>

**ADMINISTRATIVE EXPENSES**

Stipends/salaries for officers/employees:	\$ _____
Office secretary:	\$ _____
Lost time:	\$ _____
FICA, Federal and State Withholding:	\$ _____
<b>SUB TOTAL</b>	<b>\$ _____</b>

**COMMITTEE EXPENSES**

Election Committee:	\$ _____
Ballot printing:	\$ _____
AFGE envelopes/secret ballot envelopes:	\$ _____
Postage:	\$ _____
Mailbox rental:	\$ _____
Voting booth rental:	\$ _____
Food/coffee/etc.:	\$ _____
Annual leave:	\$ _____
Election Committee Award:	\$ _____

Annual audit/DOL/IRS Reports: \$ \_\_\_\_\_  
**SUB TOTAL** \$ \_\_\_\_\_

**ORGANIZING/MEMBERSHIP DRIVE**

i.e.:  
 Lunch and Learns: \$ \_\_\_\_\_  
 Rebates: \$ \_\_\_\_\_  
 Union fairs: \$ \_\_\_\_\_

**LEGISLATIVE ACTION**

LAF Fund (2015 Convention min = \$5 per member per year): \$ \_\_\_\_\_

**PURCHASE OF NEW EQUIPMENT** (major items such as computer, copier, etc.): \$ \_\_\_\_\_  
**SUB TOTAL** \$ \_\_\_\_\_

**TOTAL PROJECTED EXPENSES:** \$ \_\_\_\_\_  
**TOTAL PROJECTED REVENUE:** \$ \_\_\_\_\_  
**PROJECTED BALANCE:** \$ \_\_\_\_\_

If the total projected expenses exceed the total projected revenue, you will experience a cash shortfall and adjustment must be made. Make sure the local has an adequate dues structure by using the following formula.

The bi-weekly deduction should be at least equal to the national per capita tax plus council per capita tax plus required affiliation fees and a reasonable percentage of the above (5% - 15%).

To assist you in determining the dues increase needed to balance the budget in case of a deficit budget, please use the following guideline:

**deficit amount \$ \_\_\_\_\_ divided by number of active members \_\_\_\_\_ divided by 26 pay periods = bi-weekly dues increase of \$ \_\_\_\_\_ to offset deficit.**

To determine if this amount is adequate:

**\_\_\_\_\_ members X \$ \_\_\_\_\_ increase X 26 pay periods will generate new revenue of \$ \_\_\_\_\_**

## L. Local: Communications How to Message

### ***Developing a Message***

Before reaching out to the media or responding to a request for comment, it is essential to know what points you would like to get across. A message can have national importance, or it can relate to a purely local issue. A well-crafted message will assist with media interactions.

Many issues pertaining to the government are complex or technical. These issues can comprise an alphabet soup of acronyms and jargon that may not be understood by the public or the media. Your local's message should use common language instead of acronyms and government speak.

Create messages that are compelling, clear, brief, and illustrate the relevance of an issue to the audience. Before developing a message, ask yourself:

- What is the issue?
- What is the issue really about?
- What is AFGE's position?
- What is the agency/management/etc. position?
- Why is AFGE right in its position?
- Why is the opposition wrong in its position?
- Why should the public care about this issue?

Your message will be the basis for all comments to the media and themes for events on an issue. It is a good rule to develop three points consistent with the message and to be able to state it in 20 seconds or less, thereby becoming suitable for use as a sound bite. Rehearse the message until saying it becomes automatic. If it is awkward to say, rewrite it so that it can be stated more smoothly. Posing rhetorical questions can be a powerful yet subtle way to get a point across. "How is the public served by stripping defense workers of their whistleblower protections?"

### ***Planning a Media Event***

Sponsoring an event can be an effective way of obtaining media coverage. Events are opportunities to dramatize issues and make them seem more newsworthy. Events also provide an opportunity to enroll the support of other organizations. Other unions and elected leaders can be natural allies on AFGE issues. Sometimes unlikely alliances can be forged, such as working with a local veterans' or seniors' group to fight the proposed closure of a government facility. Allies can contribute financial resources, people power, and expertise that will assist with the planning and hosting of an event. If you want to involve other groups, it is best to invite their participation early on in the planning process.

At the beginning stages of planning of your event, you can reach out to AFGE's field mobilization experts in the Political Action department for pointers on how to make your event a success.

### ***Notifying the Media***

If attempting to book a spokesperson on a local television or radio program, notify the media two or three weeks in advance. Otherwise, notifying the media of the event two or three days prior should be sufficient. In general, you should:

- Email a copy of the media advisory for your event to the assignment editor or the news desk of the media outlet.
- Follow up the day of the event to firm up media attendance.
- With enough lead time, the AFGE Communications Department can assist with contacting local media on your behalf for your major campaigns and events.

### ***Day of Event***

- Reconfirm roles with participants and volunteers.
- Have a press packet on site that includes the advisory, list of speakers with title, press release, information on the local, etc.
- Designate a volunteer to greet the press when they arrive and introduce the press to spokespersons.
- Be sure to have all needed items prior to start, including signs, buttons, bottled water, umbrellas.
- Have someone onsite who will take photos of the day's actions. You can then send those images to your district and the national office for inclusion in various communication platforms. This will also be great content for your local's website, newsletter, flyers, and/or social media pages.
- Don't forget to have fun!

### ***After the Event***

- Follow up the event and media coverage with letters to the editor, a press release, or attempts to book a guest on a local radio or TV program. At times the media may cover an event based on an advisory or press release, rather than sending a reporter onsite.
- A day or two after your event, take some time to look at local news sites and search engines to locate published stories about your action. Collect these news clips and send them around to your members. These can be included in an event wrap-up that you send to your stakeholders.
- Finally, don't take a lack of coverage personally. Sometimes the best planned and implemented events don't get any coverage at all. The news is unpredictable; developments beyond your control can rob your event of media coverage. With persistence, the media will cover your issue.

## **LEADERSHIP TIPS:**

### **Event Roles and Consideration**

- Spokesperson(s)
- Writing media advisory
- Pitching event to media
- Emcee
- Marshals
- Props
- Greeter for the media
- Supplies (bottled water, ponchos, etc.)
- Alternate site
- Necessary permits
- Competing events

### ***Creating Online Union Communications***

Implementing web-based tools and embracing digital communication can go a long way in streamlining and delivering the connection points members are looking for from their union. Engaging audiences online is an effective way to augment, complement, and supplement your day-to-day union activities. The ways in which people receive their news and information and engage with family, friends, and colleagues increasingly is taking place online.

As a new leader, you may encounter or have your own reservations about using the web as a key communications vehicle. As your local develops its communications team and identifies a communications coordinator, it's important to air these concerns. Take time to survey how you're currently disseminating information and connecting with your membership. You'll likely find that information you're including in desk drops, bulletin board postings, and mailings will translate easily to an online platform — making the information your members need to know available on their schedules.

There are countless online tools available that can take your communications, planning, and task management to the next level. For more information on these tools, visit [www.afge.org/commstraining](http://www.afge.org/commstraining). The AFGE Communications Department also assist locals in developing their own websites based on the national's webpage. Learn more at [www.afge.org/websites](http://www.afge.org/websites).



### **AFGE Featured Publications**

**AFGE's Week in Review.** The AFGE Week in Review is a weekly roundup of the latest stories, actions, and legislation AFGE is active with on behalf of its membership. From leadership gains to policy initiatives to community projects, the Week in Review is a key tool in letting activists know about what's happening in their union. Members can sign up for this weekly e-newsletter on the AFGE website, [www.afge.org](http://www.afge.org).

**Government Standard.** This is AFGE's bi-monthly membership publication and is an excellent source of current news about legislative and policy issues affecting government workers. The Government Standard also contains stories on local union successes in organizing, collective bargaining, grassroots political action, and community service.

**AFGE Leader.** The AFGE Leader is the premier publication keeping leaders of our union in the know about issues impacting government workers and the latest successes around the federation.

**AFGE.org** is home to AFGE's website, which contains a wealth of information on issues, events, and resources. The MyLocal and MyCouncil sections of AFGE.org enable presidents and treasurers to maintain their membership roster and review important financial information.

**M. Local: If it is to be – Its up to me**

AFGE Leadership Meeting  
Philadelphia, Pennsylvania - June 7 - 10, 2016

## **IF IT IS TO BE...IT'S UP TO ME**

OUR MEMBERS DEPEND ON US TO REPRESENT THEM IN THE WORKPLACE, SECURE AND PROTECT THEIR PAY; AND BENEFITS; AND TO FIGHT FOR THE MISSION OF THEIR AGENCIES AND ACTIVITIES. THIS IS OUR RESPONSIBILITY AS UNION LEADERS.

TAKE A FEW MINUTES TO REFLECT ON THE FOLLOWING:

- What is my key takeaway from this meeting?
- What are my personal commitments to action?
- What do I need to share with those back home who were unable to attend this meeting?

Write your declaration here:

"It's up to me to: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Speak your commitment into being by sharing it with your tablemates. Ask one of them to help you honor your commitment by checking in with you in two weeks to see how things are going. Who will YOU support in this way?

Name: \_\_\_\_\_ Local: \_\_\_\_

Phone/Text#: \_\_\_\_\_ Email: \_\_\_\_\_

N.Local: Meeting Minutes Fillable



# MEETING MINUTES

AFGE L/C \_\_\_\_\_

AGENCY \_\_\_\_\_

[Date | time] | Meeting called to order by [Name]

Location: [Location]

Facilitator: [Name]

Total In Attendance:  
*(attach Attendee Sign-In Sheet)*

Call to Order:

Roll Call:

Agenda:

Approval of minutes:

Reports

Old Business:

New Business:

Financial Reports

Announcements

Next Meeting

[Date | time], [Location]

Motion to adjourn was made at \_\_\_\_\_, \_\_.m and was passed unanimously.



## O. Local: Online Resources

### Online Resources

The following are a list of online websites where you can find additional Steward information, resources, and training.

Website	Description
<a href="http://www.afge.org">www.afge.org</a>	The AFGE website has a wealth of resources to assist stewards including information on communication, organizing, representation, collective bargaining, and other topics.
<a href="http://www.afge.org/stewards">www.afge.org/stewards</a>	This site includes steward-specific information, resources, and training.
<a href="http://www.flra.gov">www.flra.gov</a>	The Federal Labor Relations Authority site includes guides, manuals, forms, checklists as well as current information on the 5 U.S.C. Chapter 71 (the Statute) and associated case law.
<a href="https://www.dol.gov/olms/index.htm">https://www.dol.gov/olms/index.htm</a>	The Department of Labor provides important information on the Labor-Management Reporting and Disclosure Act of 1959 (LMRDA)
<a href="https://www.youtube.com/watch?v=s8-gmmx9eXI&amp;list=PLnY1508ZqZy2ftWzujJIX0edBiznR-NR&amp;index=2">https://www.youtube.com/watch?v=s8-gmmx9eXI&amp;list=PLnY1508ZqZy2ftWzujJIX0edBiznR-NR&amp;index=2</a>	10 minute training video on how to effectively conduct a Weingarten meeting. Produced by OPEIU Local 8 and the Washington State Labor Council.
<a href="http://www.workrightspress.com/lrus.html">http://www.workrightspress.com/lrus.html</a>	Designed for private sector unions, the Legal Rights of Union Stewards by union attorney Robert M. Schwartz provides useful information for new stewards on what they can and cannot do. Cost is \$20.00.
<a href="http://www.afge171.org/Council/StewardsJob.htm">http://www.afge171.org/Council/StewardsJob.htm</a>	A short description of steward and member responsibilities developed by AFGE Local 171.
<a href="http://www.afgelocal1345.org/gpage.html">http://www.afgelocal1345.org/gpage.html</a>	A comprehensive list of resources developed by AFGE Local 1345.

P. Organize: 1187

Form 1187 Rev. April 2016



# REQUEST FOR PAYROLL DEDUCTIONS FOR LABOR ORGANIZATION DUES

Section 5525 of title 5 United States Code (Allotments and Assignments of Pay) permits Federal agencies to collect this information. This completed form is used to request that labor organization dues be deducted from your pay and to notify your labor organization of the deduction. Completing this form is voluntary, but it may not be processed if all requested information is not provided.

This record may be disclosed outside your agency to: 1) the Department of the Treasury to make proper financial adjustments; 2) a Congressional office if you make an inquiry to that office related to this record; 3) a court or an appropriate Government agency if the Government is party to a legal suit;

4) an appropriate law enforcement agency if we become aware of a legal violation; 5) an organization which is a designated collection agent of a particular labor organization; and 6) other Federal agencies for management, statistical and other official functions (without your personal identification).

Executive Order 9397 allows Federal agencies to use the social security number (SSN) as an individual identifier to avoid confusion caused by employees with the same or similar names. Supplying your SSN is voluntary, but failure to provide it, when it is used as the employee identification number, may mean that payroll deductions cannot be processed.

Your agency shall provide an additional statement if it uses the information furnished on this form for purposes other than those mentioned above.

**PLEASE PRINT IN BLOCK UPPERCASE LETTERING USING BLACK/BLUE INK.**

1. Last Name First M.I.

2. Home Address Unit #

City State Zip code 3. Employee SSN 4. Date of Birth - MM/DD/YY

5. Home Phone Number 6. Personal Cell Phone Number (preferred) 7. Office Phone Number Extension

8. Primary Personal Email (Not your government email address)  Opt Out Email

9. Name of Agency

I would like to receive text messages from AFGE.  
 I give permission for AFGE to invite me to robocalls and tele-town halls via my personal cell phone.

**Section A - Authorization by Employee**

I hereby authorize the agency named above to deduct from my pay each pay period, or the first full pay period of each month, the amount certified below as the regular dues of the:

**American Federation of Government Employees** C       L

Council # (if applicable) Local #

and to remit such amount to that labor organization in accordance with its arrangements with my employing agency. I further authorize any change in the amount to be deducted which is certified by the below named labor organization as a uniform change in its dues structure.

I understand that this authorization, if for a biweekly deduction, will become effective the pay

period following its receipt in the payroll office of my employing agency. I further understand that Standard Form 1188, Cancellation of Payroll Deductions for Labor Organization Dues, is available from my employing agency, and that I may cancel this authorization by filing Standard Form 1188 or other written cancellation request with the payroll office of my employing agency.

Such cancellation will not be effective, however, until the first full pay period which begins on or after the next established cancellation date of the calendar year after the cancellation is received in the payroll office.

Contributions or gifts (including dues) to the labor organization shown at the left are not tax deductible as charitable contributions. However, they may be tax deductible under other provisions of the Internal Revenue Code.

Signature of Employee Date Signed MM/DD/YY Gender (Optional)  F  M  Other

FOR COMPLETION BY AGENCY ONLY - The above named employee and labor organization meet the requirements for dues withholding. (Mark the appropriate box. If "YES" send this form to payroll. If "NO" return this form to the labor organization.)

Yes  No

**Section B - For Use by Labor Organization**

Name of Labor Organization (Indicate Local)

**AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES, AFL-CIO, LOCAL**     I. D. Code:

I hereby certify that the regular dues of this organization for the above named member are currently established at \$ \_\_\_\_\_ per biweekly pay period.

Signature and Title of Authorized Official Date signed MM/DD/YY

**REBATE REQUEST FORM \***

Fax to \_\_\_\_\_ Membership Type  Full-time  Part-time

**New Member** I hereby certify that I have received a rebate from Local \_\_\_\_\_ in the amount of \_\_\_\_\_  
 Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_


**Recruiter** I hereby certify that I have received recruiter bonus from Local \_\_\_\_\_ in the amount of \_\_\_\_\_  
 Recruiter Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Recruiter SSN \_\_\_\_\_ Local # \_\_\_\_\_

Current Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Notes \_\_\_\_\_

\*IRS Form 1099 or W-2 will be issued based on current income tax laws by the payer.

Q. Organize: DC Membership Form

Form 277 Rev. July 2016



# AUTHORIZATION OR CANCELLATION OF VOLUNTARY DEDUCTION FOR PAYMENT OF EMPLOYEE ORGANIZATIONAL DUES

GOVERNMENT OF THE DISTRICT OF COLUMBIA OFFICE OF BUDGET AND FINANCIAL MGT. DISTRICT ACCOUNTING PAY SECTION

SECTION A - TO BE COMPLETED BY EMPLOYEE

PLEASE PRINT IN BLOCK UPPERCASE LETTERING USING BLACK/BLUE INK.

---

**Last Name**

**First**

**M.I.**

**Home Address**

**Apt. or Suite No.**

**City**

**State**

**Zip + four**

**Home Phone Number**

**Personal Cell Phone Number (preferred)**

**Office Number**

**Extension**

**Primary Personal Email (Not your government email address)**  **Opt Out Email**

I would like to receive text messages from AFGE.  
 I give permission for AFGE to invite me to robocalls and tele-town halls via my personal cell phone.

**Employee SSN**

**MJC**

**Effective date**

I hereby authorize a deduction from my pay each pay period, to be forwarded to the employee organization named herein:

**NAME OF EMPLOYEE ORGANIZATION**

\_\_\_\_\_

Signature of Employee

**Check One**

Cancellation - Enter 0000 Above
  New Application - Field Code 096

Enter proper deduction code (see reverse side)

Local \_\_\_\_\_

Date Signed MM/DD/YY

SECTION B - TO BE COMPLETED BY EMPLOYEE ORGANIZATION

**NAME OF EMPLOYEE ORGANIZATION**

AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES

\_\_\_\_\_

Signature and Title of Authorized Official

Local \_\_\_\_\_

Date signed MM/DD/YY

REBATE RECEIPT

**Recruiter Last Name**

**First**

**M.I.**

**Recruiter SSN**

**Email address**

**Home phone**

City \_\_\_\_\_

State \_\_\_\_\_


Zip \_\_\_\_\_

\*In compliance with DoL regulations, any recruiter receiving over \$600 a year will receive a 1099 tax form.

## R. Organize: PAC Brochure


### What's Your Level?

**President's Club** President's Club  
Diamond Lapel Pin




\$40 per pay period or \$1,040

**Platinum** Durable PAC Duffel Bag  
Blue canvas with brown  
leather straps



\$30 per pay period  
or \$780


**Emerald** \$20 per pay period or \$520



Downtown  
Microfiber Jacket

L    M  
 S    XL  
 2XL    3XL

**Diamond** \$15 per pay period or \$390




Polo shirt

Ladies  
 Mens  
 L    M  
 S    XL  
 2XL    3XL

**Gold** \$10 per pay period or \$260

**Silver** \$5 per pay period or \$130




"Elections have consequences. Your contribution to AFGE PAC helps elect lawmakers who understand and support the work that we do and the critical services we deliver. It also helps to defeat lawmakers who want to shrink government to the size where they can drown it in the bathtub."

J. David Cox Sr., AFGE National President

Contribute today from your PC or mobile device


Go to:  
[www.afge.org/mypac](http://www.afge.org/mypac)  
to sign up for credit card deduction.



Please return the form on the other side once completed to AFGE. You can mail it to:

**AFGE PAC, 80 F Street NW,  
Washington DC 20001**

Or you can email the form to:  
[afgepac@afge.org](mailto:afgepac@afge.org)






**AMERICAN FEDERATION  
OF GOVERNMENT EMPLOYEES**  
Political Action Committee

202.639.6457   [afgepac@afge.org](mailto:afgepac@afge.org)   [www.afge.org](http://www.afge.org)

Do Not Distribute on Government Property  
Under Any Circumstance.

# AFGE PAC



AMERICAN FEDERATION  
OF GOVERNMENT EMPLOYEES  
— Political Action Committee —



Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Last 4 Digits of Social \_\_\_\_\_ AFGELocal \_\_\_\_\_  
 Mobile phone \_\_\_\_\_  
 I want to receive text messages  
 Home E-mail \_\_\_\_\_  
 Agency \_\_\_\_\_  
 Occupation \_\_\_\_\_  
 AFGELocal is now collecting data on which parties PAC contributors prefer their contributions be given to each year:  
 Democrat  Republican  Defer

Check (payable to AFGELocal PAC) \$ \_\_\_\_\_  Cash \$ \_\_\_\_\_  
 Payroll Deduction per Pay Period \$ \_\_\_\_\_  
 This is an upgrade  
 Retiree annuity deduction per mo. \$ \_\_\_\_\_

Visa  MasterCard  
 American Express  Discover  
 One Time Contribution \$ \_\_\_\_\_  
 Monthly Contribution (12 times) \$ \_\_\_\_\_  
 Credit Card No. \_\_\_\_\_  
 Security Code \_\_\_\_\_ Expire Date \_\_\_\_\_  
 Signature \_\_\_\_\_

\* Contributions to AFGELocal-PAC are used for political purposes and are not tax deductible. You may give more or less than the amounts suggested and AFGELocal and AFGELocal-PAC will not favor or disadvantage anyone by reason of the amount of their contribution or their reason not to give.

### Payroll Deduction

ABA #: 026003379  
 Account #: 151021202  
 Bank: Amalgamated Bank  
 Suggested amounts: \$5, \$10, \$15 or \$20 per Pay Period

**Employee Express**  
[www.employeeexpress.gov](http://www.employeeexpress.gov)

- 1 Login to your Account
- 2 Click on Financial or Discretionary Allotments
- 3 Click on Start New Allotment
- 4 Enter the Routing, Account Numbers and chosen amount from information above
- 5 Follow instructions to completion

**MyPay**  
<http://mypay.dfas.mil>

- 1 Login to your Account
- 2 Click on Financial or Discretionary Allotments
- 3 Click on Start New Allotment
- 4 Enter the Routing, Account Numbers and chosen amount from information above
- 5 Follow instructions to completion

**National Finance Center/Employees Personal Page (EPP)**  
[www.nfc.usda.gov](http://www.nfc.usda.gov)

- 1 Login to your Account
- 2 Click on Financial or Discretionary Allotments
- 3 Click on Start New Allotment
- 4 Enter the Routing, Account Numbers and chosen amount from information above
- 5 Follow instructions to completion

Retired AFGELocal members can still contribute to PAC at:  
[www.serviceline.opm.gov/](http://www.serviceline.opm.gov/)

- 1 Log into your account and click establish an allotment to an organization
- 2 Select AFGELocal and the amount of the allotment

### Why AFGELocal PAC?

- AFGELocal PAC will fight legislation cutting federal pay, pensions and benefits.
- AFGELocal PAC will fight legislation that cuts agency funding.
- AFGELocal PAC will fight federal staffing cuts.
- AFGELocal PAC fights to have your voice heard.

### Your Contribution Fuels our Fight

#### Politics Matter


You have a very personal stake in who gets elected. As a government employee, the lawmakers who get elected determine your pay, benefits, job security and agency funding. This year, some lawmakers have threatened to cut all four. By participating in AFGELocal PAC you can help choose who is looking out for your best interests on Capitol Hill.

#### AFGELocal PAC: How Does it Work?

We support candidates who advocate for government employees regardless of party affiliation. Our collective contributions build relationships which are critical to passing or defeating key legislation.

#### Strength in Numbers

A large PAC sends a clear message to Congress: our members are politically informed, motivated, involved and want their voices heard.



S. Organize: TSA 1158

DEPARTMENT OF HOMELAND SECURITY  
Transportation Security Administration

**VOLUNTARY DEDUCTION / CANCELLATION OF AFGE UNION DUES**

**INSTRUCTIONS:** Sections I, II, and IV are to be completed by employee. Section III must be completed by the AFGE Local Representative, and Section V will be completed by the TSA Office of Human Capital (OHC) HRAccess. Please type or print the required information in the spaces below. Human Resources/Payroll Specialist will retain the original and provide a copy to the employee.

<b>SECTION I. Employee Information</b>			
Last Name:	First Name:	SSN: (full)	
Home Address: (Number and Street)		(City)	(State) (Zip Code)
Contact Number: ( ) -	Airport Code/Office:		
Personal email address: (optional)			
<b>SECTION II. Voluntary Deduction Request</b>			
Labor Organization – <b>American Federation of Government Employees (AFGE)</b>			
Action Requested: (check only one box).			
<input type="checkbox"/> Establish AFGE Dues Deduction – Employees must contribute dues for a minimum of one (1) year.			
<input type="checkbox"/> Cancel AFGE Dues Deduction – Cancellations must be submitted during the time frame specified in Section IV.			
<b>SECTION III. Union Representative Only</b>			
Amount to be Deducted Bi-weekly: \$		ID or Local Number: (if applicable):	
Union Representative Name		Union Representative Signature	Date
<b>SECTION IV. Employee Acknowledgment</b>			
I hereby authorize TSA to deduct from my pay each pay period the amount certified above as the regular dues of the AFGE Local, and to remit such amount to AFGE in accordance with its arrangements with TSA. I understand that this authorization will become effective the pay period following its receipt in the TSA Payroll Office. I understand that the AFGE has the right to change the amount to be deducted when certified by AFGE at any given time after my membership begins. I further understand I must resubmit this form to cancel dues deductions for AFGE, and that I may only cancel this dues deduction after my initial one-year anniversary membership date or upon my selection to a position not covered by the bargaining unit. I fully understand that after completing my initial one (1) year of contributions, I can cancel my contributions within two (2) pay periods prior to or two (2) pay periods after my anniversary membership date each year. Cancellations relating to a position change can be submitted upon the effective date of this action. Cancellations will be effective the first full pay period after the form is received in the TSA Payroll Office. Bargaining unit employees who have elected to have dues withheld, who are reassigned from one airport to another, will continue to have dues withheld.			
Signature		Date	
<b>SECTION V. TSA Payroll Office Use ONLY</b>			
Voluntary Deduction Code:		Collection Code:	

**TSA Payroll Office Processing Instructions – Forward to:**

TSA HRAccess Shared Service Center  
Metroplace1, 2650 Park Tower Drive, Suite 201  
Vienna, VA 22180-7300

**PRIVACY ACT STATEMENT: AUTHORITY:** 49 U.S.C. § 114(n); E.O. 9397. **PRINCIPAL PURPOSE(S):** To request that union dues be deducted from your pay, or cancel union dues from being deducted from your pay, and notify AFGE accordingly. **ROUTINE USE(S):** Information may be shared with the Department of the Treasury, with employees of AFGE, or for other routine uses listed in the Transportation Security Administration's system of records notice, DHS/TSA 022 National Finance Center (NFC) Payroll Personnel System. **DISCLOSURE:** Voluntary; failure to furnish the requested information may result in an inability to process your request. **Your SSN is requested by AFGE for reporting requirements.** Supplying your SSN is voluntary, but failure to provide it may result in inability to process your payroll deduction/cancellation request.

## T. Representation: Example Demand to Bargain

April 8, 2005

MEMORANDUM FOR: Chief, Labor Relations Branch, ARHLL

FROM: AFGE Council \_\_\_, Midterm Bargaining Team

SUBJECT: Chapter \_\_, Space Management, Administration  
Services Policy Handbook

This serves as AFGE Council of \_\_\_ Locals demand to bargain over the proposed changes to Chapter \_\_ of the Administration Services Policy Handbook. Our preliminary proposals are as follows:

1. **Parking:** Parking spaces provided, as the result of a reasonable accommodation, will not be reported to the Internal Revenue Service as a fringe benefit.
2. **Emergency Evacuation Equipment:** Each office situated above the ground floor in either GSA or leased space must be provided emergency evacuation equipment in accordance with the standards of the American Red Cross.
3. **Natural Light:** The access to natural light shall be maximized in the space occupied by employees.
4. **Break Rooms:** Break rooms/lunchrooms will be provided at a 100:2 ratio.
5. **Unoccupied Private Office Space:** The use of unoccupied private office space will be negotiated at the local level.
6. **Enclosed Space:** All private office space or enclosed space that is larger than 10x10 must have at a minimum one (1) direct air vent.

2.

7. **Space Allocations:** Workstations occupied by non-supervisory employees in Headquarters and the Field will have a minimum of 64 square feet. Additional space will be provided for the required equipment necessary to perform his/her duties Actual allocations will be determined by local negotiations.
8. **ADA Requirements:** All space designs and alterations shall comply with ADA requirements.
9. **Utilization of Systems Furniture:** The use of systems furniture will be determined in Local Negotiations.
10. **Analyst/Engineer/Architects:** Employees classified as Construction Analysts, Engineers, Architects, or any position demonstrating the need, will have larger workstations to accommodate the requirements of the positions. In addition, space will be allotted for review and storage of the necessary plans/blueprints .
11. **Planning Process:** The Local Union shall be consulted and included in the overall planning process of all space needs prior to the issuance of the Solicitation for Offers and execution for any Occupancy Agreement. The Local Union will be given the opportunity to provide input in the development of the plans and shall be provided a copy of the plan for concurrence.
12. **Bulletin Boards:** Section 8.06 of the \_\_\_/AFGE Agreement provide the display and distribution of Union material.
13. **Space Alterations:** The Local Union shall be consulted and included in the overall planning process of any space alterations or request for release of space.
14. **Definition:** The term systems furniture includes ergonomic chairs, computer equipment, and work surfaces.
15. **Space Preference:** The space occupied by contractors will be determined by Local negotiations and HUD employees shall have preference in space and workstation location over contracted employees. In no instance will the space for contractors be equal to or greater than HUD employees.

16. **Pre-Occupancy and Post-Occupancy Review and Inspection:** A pre-occupancy and post-occupancy review and inspection will be conducted of the facility by the appropriate GSA and HUD representatives, and will include Union officials.
17. **Post-alteration Inspection:** The local Union will be given the opportunity to participate in a post alteration inspection upon completion of the alterations to ensure the space has been prepared in accordance with the construction drawings and the terms of the contract.
18. **Future Changes:** The parties agree to engage in good faith bargaining over any unforeseen or later identified issues.
19. **Local Bargaining:** Impact and implementation will be negotiated at the Local level in accordance with Article 5 of the HUD/AFGE Agreement.
20. **Effective Date:** This supplement shall become effective within 30 days of the date the parties at the negotiating table sign this supplement.
21. **Access to HUD space:** Buildings having outside cameras or surveillance equipment, parking checks or cameras, and who restrict public access to the floors not occupied by HUD (for buildings with communal ventilation systems) or the 2 floors above and below those occupied by HUD will be given preference in the selection of sites based on the degree of greater security offered employees."

Below is an information request. This information needs to be provided prior negotiations in order for the Union team to be properly prepared to begin negotiations.

1. What are the GSA size standards for employee space?
2. The footnote on page 13-8 is missing. What is the footnote?
3. Who is responsible for enforcing compliance with Section 1 (4)(d)(1)? How will this be accomplished?
4. Provide additional clarification of a Level I and Level 2 Director.
5. Provide the amount spent per employee in the last two years for all office that have been renovated or are in the planning stages. Also, provide the amount of square footage per employee and the square footage of all conference rooms, break rooms and lunchrooms.
6. Is the allocation of \$7,000 per employee adjusted by location based upon local labor costs?
7. Does the allocation of \$7,000 per employee include the furniture provided in non-bargaining unit space?
8. Provide clarification of the space required for outstationed Headquarters and program personnel.

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These are preliminary proposals only and the Union reserves the right to bargain or amend or add proposals in accordance with Article 5. Tim Oravec has been appointed as Chief Negotiator for the Council.



## U. Representation: FLRA 22 ULP Form

### INSTRUCTIONS FOR COMPLETING FORM 22:

#### General

Use this form if you are charging that a federal activity or agency committed an unfair labor practice under paragraph (a) of section 7116 of the Federal Service Labor-Management Relations Statute. File an original form with the appropriate Regional Director, Federal Labor Relations Authority. If you do not know that address, contact the Office of the General Counsel, Federal Labor Relations Authority, (202)482-6600. If filing the charge by fax, you need only file a fax-transmitted copy of the charge (with required signature) with the Region. You assume responsibility for receipt of a charge. A charge is a self-contained document without a need to refer to supporting evidence and documents that are also submitted to the Regional Director along with the charge. If filing a charge by fax, do **not** submit supporting evidence and documents by fax. See 5 CFR Part 2423 for an explanation of unfair labor practice proceedings and, in particular, §§ 2423.4 and 2423.6, which concern the contents, filing, and service of the charge and supporting evidence and documents.

#### Instructions for filling out each numbered box

**#1.** Give the full name of the activity (or agency) you are charging and the mailing address, telephone #, and fax # (if available). Include the street number, city, state, zip code. If you are charging more than one activity/agency with the same act, attach the required information on a separate sheet.

**#2.** Give the full name of the union or individual filing the charge and the mailing address, telephone #, and fax # (if available). If the union is affiliated with a national organization, give both the national affiliation and local designation.

**#3. and #4.** This information is essential to the investigation of your charge as it tells us who is representing the parties. Be as specific and as accurate as possible. It will assist the investigation if you include your home as well as work telephone number in the space provided.

**#5.** Identify which one or more of the following subsections of 5 U.S.C. 7116(a) has or have allegedly been violated. Subsection (1) has already been selected for you because a violation of (2) through (8) is an automatic violation of (1). List all sections allegedly violated:

#### **7116. Unfair labor practices**

(a) For the purpose of this chapter, it shall be an unfair labor practice for an agency--

- (1) to interfere with, restrain, or coerce any employee in the exercise by the employee of any right under this chapter;
- (2) to encourage or discourage membership in any labor organization by discrimination in connection with hiring, tenure, promotion, or other conditions of employment;
- (3) to sponsor, control, or otherwise assist any labor organization, other than to furnish, upon request, customary and routine services and facilities if the services and facilities are also furnished on an impartial basis to other labor organizations having equivalent status;
- (4) to discipline or otherwise discriminate against an employee because the employee has filed a complaint, affidavit, or petition, or has given any information or testimony under this chapter;
- (5) to refuse to consult or negotiate in good faith with a labor organization as required by this chapter;
- (6) to fail or refuse to cooperate in impasse procedures and impasse decisions as required by this chapter;
- (7) to enforce any rule or regulation (other than a rule or regulation implementing section 2302 of this title) which is in conflict with any applicable collective bargaining agreement if the agreement was in effect before the date the rule or regulation was prescribed; or
- (8) to otherwise fail or refuse to comply with any provision of this chapter.

**#6.** It is important that the basis for the charge be BRIEF, COMPLETE, and FACTUAL, rather than opinion.

- Give dates and times of significant events as accurately as possible.
- Give specific locations when important, e.g., "The meeting was held in the auditorium of Building 36."
- Identify who was involved by title, e.g., "Chief Steward Pat Jones" or "Lou Smith, the File Room Supervisor."
- Tell what happened, in chronological order.

**#7.** Indicate whether you or anyone else that you know of has raised this same matter in another forum:

- a. GRIEVANCE PROCEDURE
- b. FEDERAL MEDIATION AND CONCILIATION SERVICE
- c. FEDERAL SERVICE IMPASSES PANEL
- d. EQUAL EMPLOYMENT OPPORTUNITY COMMISSION
- e. MERIT SYSTEMS PROTECTION BOARD
- f. OFFICE OF SPECIAL COUNSEL
- g. OTHER ADMINISTRATIVE OR JUDICIAL PROCEEDING
- h. NEGOTIABILITY APPEAL TO FLRA

**#8.** Type or print your name. Then sign and date the charge attesting to the truth of the charge and that you have served the charged party (individual named in box #3). Indicate method of service by placing an "x" in one of the boxes provided.



## V. Representation: Grievance Disciplinary Example

January 31, 2011

David Wood, FACHE, Director  
Oklahoma City VA Medical Center  
921 N.E. 13<sup>th</sup> St.  
Oklahoma City, OK 73104-5028

Re: Vicki M, Social Worker  
Step 3 Grievance

Dear Director Wood:

Pursuant to Article 42 of the Master Agreement, please accept this letter as AFGE Local 2562's Step 3 Grievance to challenge the January 24, 2011 decision to remove Vicki M. The Union is filing this initial grievance at a Step 3 pursuant to Article 42(7)(Note 5) of the Master Agreement. In short, the Union asserts that the Agency did not have just or sufficient cause to remove Ms. M and that her termination is in unlawful retaliation for her union activity, EEO activity, and Whistleblower activity.

The Agency is in violation of Article 13 of the Master Agreement for it did not have Just or Sufficient Cause to terminate Ms. M.

Although the Agency has charged Ms. M with seven reasons for the proposed removal, most of those reasons refer to one incident, specifically, Ms. M's alleged retrieval of unprotected files and her notification of this security breach to VISN 16 Privacy Officer Mary Jones through her union representative Chris Sanford. Ms. M denies that her actions were misconduct. Ms. M is required – as all DVA employees are – with reporting Privacy Act violations; this is exactly what she did. Additionally, Ms. M denies that she was absent without leave on October 12 and 13, 2010. Ms. M was prevented from requesting leave herself on October 12, 2010, due to her arrest. Notwithstanding, Ms. M requested leave for both days through her union representative. Article 32(1)(D) and (E) of the Master Agreement is clear that leave shall not be denied for the

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purposes of discipline and that no arbitrary restraints on requesting leave shall be imposed.<sup>1</sup> Since Ms. M did not violate any agency policy by her actions, the Decision to terminate her is without just and sufficient cause.

The Agency is in violation of Article 2 and Article 13(6) of the Master Agreement for its termination is in retaliation for statutorily protected conduct.

Article 2 and Article 13(6) of the Master Agreement requires the Agency to follow all laws in its disciplinary actions. However, the Agency has not done so in this Decision as the removal is in retaliation for Ms. M's statutorily protected (1) EEO activity, *see* 42 U.S.C. § 2000e *et seq.*, (2) whistleblowing activity, *see* 5 U.S.C. § 2302(b)(8), and (3) her union activity, *see* 5 U.S.C. § 7116(a)(1), (2), (4) and (8). Therefore, Article 2 and Article 13(6) of the Master Agreement have been violated.

The Agency is in violation of Article 16(1) and Article 17 of the Master Agreement for its termination is in retaliation for protected EEO conduct.

In addition for violating the Master Agreement in its protection against unlawful retaliation, the Agency also violated the Master Agreement in its own protection against retaliation for EEO activities. It is undisputable that Ms. M has engaged in recent, protected, EEO activity. Similarly, there can be no doubt that Mark Huyke (the proposing official) and you (the deciding official) were aware of Ms. M's protected activities. Lastly, there is a temporal nexus between the proposed termination, termination and Ms. M's protected activities. Therefore, Ms. M has presented a *prima facie* case of retaliation with respect to the proposed termination. The Agency's alleged legitimate reasons as documented in the proposed termination<sup>2</sup> are pretextual.

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<sup>1</sup> Therefore, the Union asserts that Article 32 has also been violated by the Decision.

<sup>2</sup> Although Ms. M submitted a comprehensive written opposition to the proposed termination, the January 24<sup>th</sup> Letter of Decision does not address any of her points. In fact, the Decision does not explain on what basis or even which of the charges were sustained. Instead, it merely concludes that "the sustained charges against you are of such gravity, mitigation of the proposed penalty is not warranted." Therefore, the only alleged legitimate reasons remain those documented in the proposed termination.

Because Ms. M's actions were not only consistent with the Agency's policy and/or VISN's express directions, discipline for the specifications outlined in the proposed termination is pretextual. Therefore, Article 16(1) and Article 17 of the Master Agreement have been violated.

The Agency is in violation of Article 16(9) of the Master Agreement for its termination is in retaliation for protected whistleblowing conduct.

In addition for violating the Master Agreement in its protection against unlawful retaliation, the Agency also violated the Master Agreement in its own protection against retaliation for whistleblowing activities. Ms. M engaged in whistleblowing activity when she collected the evidence of supervisory misconduct, contacted Ms. Jones via her union representative, and by making a protected disclosure by forwarding the evidence to Ms. Jones. It is undisputable, given that five alleged reasons for the proposed termination are related to said disclosure, that the disclosure was a contributing factor in the agency's decision to propose the termination. As applied herein, Ms. M had a reasonable belief that her disclosure to the VISN Privacy Officer was a disclosure of unlawful activity or gross mismanagement by her supervisor. Notwithstanding VISN 16's assurances that no disciplinary action would result, Ms. M has now been issued a Decision of termination. Therefore, Article 16(9) of the Master Agreement has been violated.

The Agency is in violation of Article 16(1)(C), (2), and (5) of the Master Agreement for its termination is in retaliation for protected union activities.

In addition for violating the Master Agreement in its protection against unlawful retaliation, the Agency also violated the Master Agreement in its own protection against retaliation for union activities. Ms. M was open and public about her union activities beginning with her support for Mr. James' election as the new local president of AFGE Local 2562. On June 27, 2010, the Union held elections and that evening, Mr. James was elected and he appointed Ms. M to union steward. The very next day, the Agency issued Ms. M a disciplinary action which was mitigated to an admonishment. In early August 2010 the Agency again issued proposed discipline but this proposal was rescinded. Thereafter, on or about August 17, 2010, the Agency issued a proposed 10-day suspension for alleged failure to follow a supervisory instruction which was mitigated to

written reprimand.<sup>3</sup> This termination is yet another in the litany of meritless disciplinary actions that have begun since the day Ms. M assumed any role in the union. Therefore, Article 16(1)(C), (2) and (5) of the Master Agreement have been violated.

Alternatively, the Agency failed to properly address *Douglas* factors.

Ms. M began employment with the Agency on or about February 9, 2004. In September 2008, she was promoted to be the supervisor of the geriatric and extended care social work service. From her hire through mid-2009, Ms. M has consistently received awards for her performance and contributions. Many of her awards were listed in her written opposition to the notice of proposed removal and total thousands of dollars. Similarly, Ms. M received the best performance appraisal ratings possible within the Agency, i.e., “outstanding” with much praise in the narrative portions. Ms. M’s employment history and lack of discipline through February 2010 – before the filing of her first EEO complaint, her nomination to a union position, and her whistleblowing activity – are all factors which mitigate against the imposition of any adverse action. Nevertheless, in the Decision to terminate Ms. M’s employment, you expressly declined to evaluate mitigating facts and instead concluded “the sustained charges against you are of such gravity, mitigation of the proposed penalty is not warranted.” Your failure to consider mitigating factors is a violation of the Master Agreement, case law, and public policy.

## **CONCLUSION**

The Agency has not and cannot establish that Ms. M violated Agency regulation or policy as outlined in its proposed termination. Furthermore, the proposed adverse action is in retaliation for protected activities. Therefore, for the foregoing reasons, Ms. M respectfully requests that the January 24, 2011, Decision to terminate Ms. MacEntire be rescinded with prejudice and she be restored to her position without restriction.

Sincerely,

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<sup>3</sup> The September 2010 formal EEO complaint was amended to include this disciplinary action as a basis for retaliation.

Gony F. Goldberg, AGC  
Office of General Counsel  
202-639-6424  
202-639-6441 (fax)  
friedg@afge.org

cc: Frank James, Local President

Alma Lee, President, AFGE NVAC

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## W. Representation: Information Request

September 2, 2008

James A Zeveski, CLA  
Department of Veterans Affairs  
1 Jefferson Barracks Drive  
Building 25  
St. Louis, MO 63125-4194

Re: AFGE Local 96 and DVA (In re C)  
Request for Information

Dear Mr. Zeveski:

Pursuant to 5 USC Section 7114(b)(4), AFGE Local 96 (Union) hereby serves this request for information. The Union requests responsive information by the close of business on September 5, 2008, as the arbitration is scheduled for next week. Please convey the response via facsimile or overnight mail to the undersigned.

The Union requires the information requested in this correspondence to allow us to provide adequate and effective representation for the above captioned arbitration for further investigation this matter and to prepare the case for arbitration. This information is required to determine if the agency had sufficient justification to propose the instant discipline and also to evaluate the *Douglas* factors.

### **INFORMATION REQUESTED**

1. All documents collected by the Agency regarding the incident on July 23, 2007, that gave rise to the instant discipline, including but not limited to statements written by RN Singer, RN Green, LPN Brickey, NA Miller, and Mr. William Singleton.
2. All documents, minutes, and notes regarding management's decision to issue new SOP EMS 137-18 effective July 30, 2007.
3. Grievant Patrick C's OPF.
4. Any documents reflecting discipline, if any, for Patrick C not already contained in the OPF.

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Additionally, if you would be so kind as to let me know the location of the arbitration hearing and what time it is set to begin, I would greatly appreciate it.

Thank you for your cooperation in this matter.

Sincerely,

Gony F. Goldberg, Assistant General Counsel  
202-639-6424

cc: Glen Czarnecki

**CERTIFICATE OF SERVICE**

I hereby certify that on this \_\_\_\_\_ day of September, 2008, a copy of this Request for Information was sent via facsimile to James Zeveski at 314-845-5033.

\_\_\_\_\_  
Gony F. Goldberg, AGC

# Charge Against an Agency (FLRA Form 22)



**UNITED STATES OF AMERICA  
FEDERAL LABOR RELATIONS AUTHORITY  
CHARGE AGAINST AN AGENCY**

**FOR FLRA USE ONLY**

Case No.

Date Filed

**1. AGENCY AGAINST WHICH CHARGE IS BROUGHT**

a. Name of Charged Agency (include address, city, state, & ZIP)

b. Agency Representative (include name, title, address)

tel. \_\_\_\_\_ fax \_\_\_\_\_  
e-mail \_\_\_\_\_

**2. CHARGING PARTY**

a. Name of Charging Party (include address, city, state, & ZIP)

b. Charging Party Representative (include name, title, address)

tel. \_\_\_\_\_ fax \_\_\_\_\_  
e-mail \_\_\_\_\_

**3. BASIS OF THE CHARGE**

a. Set forth a clear and concise statement of the facts constituting the alleged unfair labor practice, including date and location of the particular acts.

b. Which subsection(s) of 5 U.S.C. 7116(a) do you believe the Agency has violated? (1)  (2)  (3)  (4)  (5)  (6)  (7)  (8)

c. Have you or anyone else raised this matter in any other procedure? No  Yes  If yes, where?  
 Grievance Procedure  Federal Mediation and Conciliation Service  Federal Service Impasses Panel  
 Equal Employment Opportunity Commission  Merit Systems Protection Board  Office of Special Counsel  
 Other Administrative or Judicial Proceeding  Negotiability Appeal to FLRA  Other \_\_\_\_\_

**4. DECLARATION**

I DECLARE THAT I HAVE READ THIS CHARGE AND THAT THE STATEMENTS IN IT ARE TRUE TO THE BEST OF MY KNOWLEDGE AND BELIEF. I UNDERSTAND THAT MAKING WILLFULLY FALSE STATEMENTS CAN BE PUNISHED BY FINE AND IMPRISONMENT, 18 U.S.C. 1001.

THIS CHARGE WAS SERVED ON THE PERSON IDENTIFIED IN BOX 1b BY [check all appropriate boxes]

In Person  1st Class Mail  Fax  Commercial Delivery  Certified Mail  e-mail (see reverse)

\_\_\_\_\_  
Type or Print Your Name

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date



# NOTES

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AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES, AFL-CIO