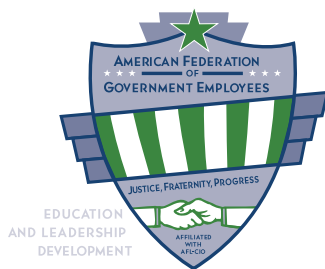




# AFGE LOCAL OFFICERS

Resource Guide

2<sup>ND</sup> EDITION



AMERICAN FEDERATION OF  
GOVERNMENT EMPLOYEES, AFL-CIO

Education and Leadership Development Department  
80 F Street, NW  
Washington, DC 20001

[www.afge.org](http://www.afge.org)

[education.afge.org](http://education.afge.org)

# AFGE Local Officers Resource Guide

## HOW TO USE THIS GUIDE

This guide includes resources designed to help AFGE Local Officers educate and lead the local union. It contains information on the roles and responsibilities of local union officers as well as useful tools for developing union activists and mentoring them in their union work. Keep this guide handy and use the resources in this book in one-on-one education sessions with officers, stewards, and members.

Stewards and other union activists will find the information contained in this guide useful in building confidence in performing their duties and gaining a more complete understanding of the goals and objectives of AFGE and the local union.

*The information and materials outlined in this guide are also available online at [education.afge.org](http://education.afge.org).*

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## CHAPTER 1

# Primary Goal of Local Union Officers: Building a Strong Local Union







# Building a Strong Local Union

The strength of AFGE is based upon the strength of our local unions. 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. When trying to solve a workplace problem or allocate the local's income, we should ask: How will this decision help build the Union? We build a stronger Local by: Involving and educating the membership, and identifying and encouraging potential leaders

## Involving and Educating the Membership

A strong local union is one that has grassroots membership support and involvement. Our leadership efforts should be directed at increasing the activism of our members. Membership mobilization is the key to member activism. We educate members through one-on-one contacts, Lunch & Learns, and other two-way communication forums that give Local leaders an opportunity to talk with members and to hear their concerns. Once members understand the issue and what is at stake, we can involve them in collective actions to increase our power (e.g., wearing a button, passing out flyers to work groups, meeting with Members of Congress, etc.).

## Identifying and Encouraging New Leaders

No AFGE Local can be strong without a secondary leadership base. As we mobilize and recruit more members, we often become aware of potential new leaders. It is our responsibility as local officers to develop these potential leaders by encouraging them and giving them more challenging union assignments. As they become more involved and take on greater challenges, they develop confidence and their commitment to the organization grows.

### LEADERSHIP TIP:

#### Identifying New Union Activists and Potential Leaders

In group meetings with employees and union members, use a conversational tone that engages group members in a two-way dialogue. Utilize active listening techniques.

Support the natural leaders of the group and then ask them to take on a small task representing the group. Dedicate some time to mentoring the new activist to help ensure that he or she is successful at the task.

An easy task for the new activist is to distribute AFGE education materials. AFGE has legislative issues updates available at its website. The new activist can be provided copies of this information to distribute to members one-on-one. This allows him or her to begin the process of educating and mobilizing his or her co-workers and developing their natural leadership abilities.

## The Three Key Functions of AFGE: Organizing, Representation, And Legislative and Political Action

Organizing, representation, and legislative and political action make up the key functions of AFGE. Each program is interdependent—if any one of these programs is weak, all of our efforts suffer. Our success in 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 three 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. This understanding is reached through union education (both formal and informal) which encourages discussion and debate.

### 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.



## CHAPTER 2

# How AFGE Operates





# How AFGE Operates

## Union Profile

**Beginnings.** The American Federation of Government Employees was formed in 1932. AFGE joined the American Federation of Labor in 1932 and has been an affiliate of the AFL-CIO since the two organizations merged in 1955.

**Size.** AFGE, the largest federal employee union, represents 600,000 federal and D.C. government workers nationwide and overseas. 200,000 of this group are dues paying members.

**Composition.** AFGE members inspect the food we eat and the places we work, they protect citizens from the illicit flow of drugs, maintain the safety of our nation's borders, care for our nation's veterans, serve as a vital link to Social Security recipients, and keep our national defense systems prepared for any danger. The majority of our members work in federal offices across the nation in a diverse variety of occupations including mechanics, lawyers, correctional officers, environmentalists, nurses, and mine inspectors.

**Geographic Spread.** The union is headquartered in Washington, D.C., and divided into 12 geographical districts consisting of some 1,100 locals. Of the 1.75 million people employed by the federal government, only 250,000 are based in the Washington, D.C. metropolitan area. Over one-half of AFGE's members are consolidated into agency-wide bargaining units. Agencies with the highest concentration of union membership include the Department of Defense, the Department of Veterans Affairs, the Social Security Administration and the Department of Justice.

## AFGE Governance and Organizational Structure

### 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.

### National Convention

This is the highest governing authority of the Union. AFGE holds its convention every 3 years, usually in August. Once the Convention makes a decision, that decision stands, and it must be carried out by every single officer and employee of the Union--at both the local and national levels. Convention action can be changed only by a later Convention or by a referendum of the membership.

The Convention has the power to:

- Adopt and promulgate laws and policies of AFGE.
- Interpret and amend the Constitution.
- Elect the National President, Secretary-Treasurer and 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 who feel they have not been treated fairly at lower levels of the Union.

Delegates to the AFGE Convention are elected by Local unions with the number of delegates per Local determined by membership strength as specified in the AFGE Constitution. Any chartered national, regional, state or district council is entitled to two delegates.

## 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 who have been approved by the union's National Executive Council. Only locals in good standing may be affiliated with AFGE Councils. Of this number, approximately 30 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:

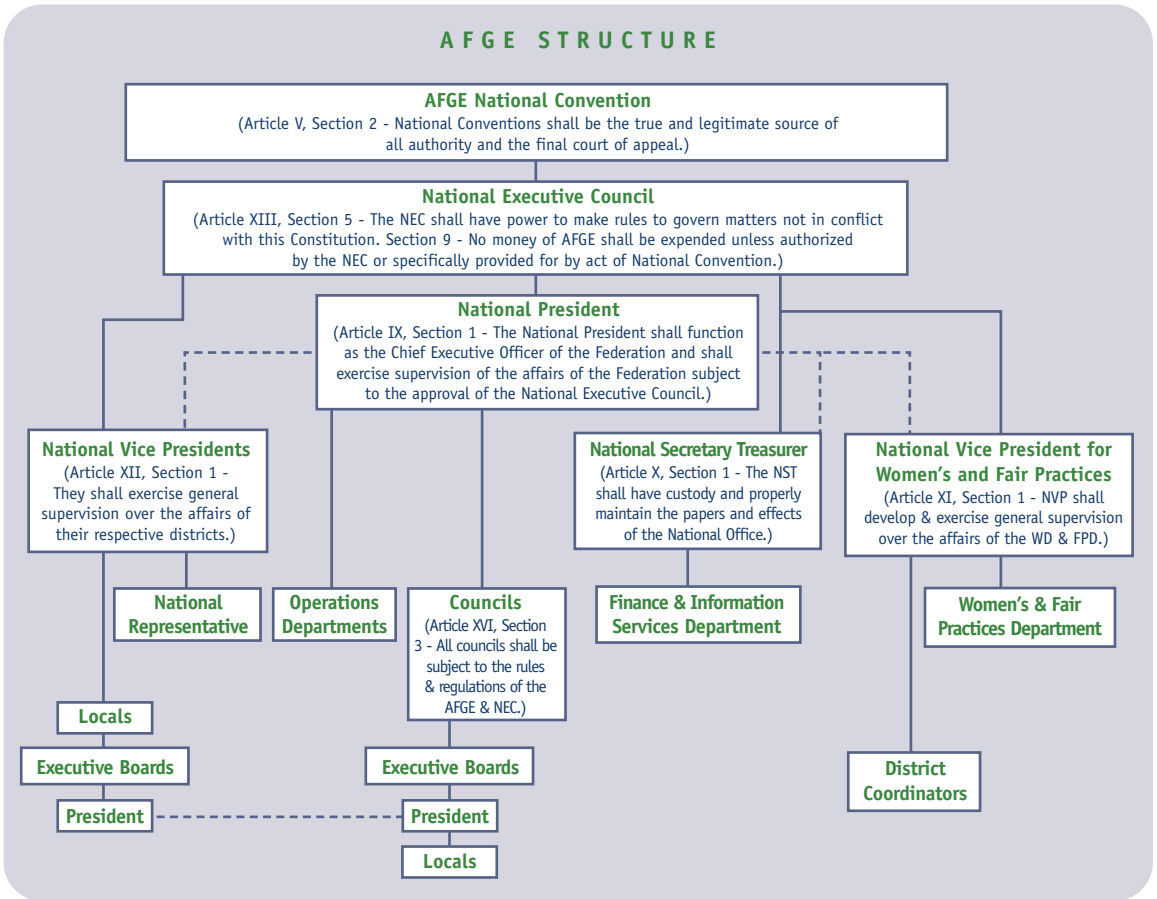
- National President
- National Secretary-Treasurer
- National Vice President for Women's and Fair Practices
- Twelve National Vice Presidents

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.

### AFGE DISTRICTS



## AFGE STRUCTURE



### District National Vice Presidents

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 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.** The National President (NP) is the principal officer of AFGE and the official speaker for the Union. He or she has full responsibility for:

- Administering and implementing policies between National Executive Council meetings and the AFGE conventions.
- Presiding over the convention and meetings of the National Executive Council (NEC) including planning and management of Convention and NEC meeting logistics.

The National President is an AFL-CIO Vice President and a member of the AFL-CIO Executive Board.

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

- Receiving all monies and disbursing monies of AFGE in payment of obligations for the Federation.
- Investing surplus funds, directing audits of affiliates, and maintaining the union's membership records.
- Submitting financial reports to the National Executive Council and at the triennial National Convention, and submitting the required financial reports to the Department of Labor and Internal Revenue Service.

The NST also ensures that District, Council, and Locals receive the information and forms they need to conduct District and Local 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, an arrangement formalized in Article XI of the Constitution by the 1997 Convention. 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 approved by the NEC.
- Providing civil rights expertise to the Federation, and concentrating on significant EEO representational matters of AFGE Locals and members.
- Overseeing the Human Rights Committee's (HRC) budget as well as facilitating communication and activity of the HRC.

**National Vice Presidents.** Each of the 12 AFGE National Vice Presidents (NVPs) is responsible for supervising all policies and programs of the Union within a District. Within the 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. (In the 14th District, the NVP deals directly with DC government department heads).

District staffing levels are based on membership numbers within the District. For every 2000 union members, the District hires 1 National Representative.



In addition to the listed staff, each District has 2 elected officers: a Fair Practices Coordinator and Women's Coordinator who are charged with:

- 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.

**Non-Elected Full-Time Staff.** AFGE employs non-elected full-time staff who support departmental functions. Full-time staff employees working at or out of AFGE headquarters are under the supervision of Departmental Directors who are in turn supervised by National Officers.

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. Legislative Political Organizers (LPOs) direct and support grassroots political action efforts throughout the Union.

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.

## AFGE Departments

### Representation

**General Counsel.** The General Counsel's Office (GCO) is 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. The GCO litigates before federal, state, and local courts and administrative agencies.

**Field Services Department.** The Field Services Department provides staff expertise in collective bargaining, legal representation, personnel system changes and other areas of direct relationship between AFGE affiliates and agency management.

### Union Building

**Membership & Organization Department.** The Membership and Organization Department assists AFGE Districts, Councils and Locals in their efforts to increase membership, as well as educate and mobilize those members into a strong national union.

### **Education and Leadership Development**

**Department.** The Education and Leadership Development Department coordinates AFGE's national leadership development program and develops standardized curriculum for use in AFGE Districts, Councils and Locals.

### **Legislative and Political Action**

#### **Legislative and Political Action Department.**

The 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.

#### **AFGE-PAC & Issue Mobilization.**

This office provides AFGE members with the tools and resources they need to be effective grassroots political activists. In concert with the Legislative Department, this office works to elect pro-worker candidates to office and to involve AFGE members in the political process.

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

### **Union Communications**

**Communications Department.** The Communications Department ensures that AFGE's message is widely dispersed at the national and local levels. The Department designs videos, print media and web communications that also serve as effective organizing tools.

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

### **Human Resources, Finance, and Information Services**

**Personnel Department.** The Personnel Department provides professional & administrative support for the personnel needs of AFGE employees.

#### **Finance and Information Services Department.**

The Finance and Information Services Department (FIS) consists of 3 sections. The Finance Section (FIN) of the FIS Department performs all of the financial reporting of AFGE. The Data Processing Section (DPS) of the FIS Department enters all membership changes. FIS's Management Information System Section (MIS) manages AFGE's computer network.

### **Building Security and Maintenance**

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

## How Much Are Minimum Union Dues?

Effective January 1, 2007, the per capita tax is \$17.50 per member per month (\$.50 per retired member per month) and for insured locals, \$18.55 per member per month (\$1.55 per retired member per month). Each local establishes its own dues structure with a dues level high enough to allow payment of the per capita tax and to provide sufficient funds for the operating expenses of the Local. The average union dues payment is \$13.00 per member per bi-weekly pay period.

## Who Decides How Much Dues We Pay?

AFGE members decide the dues structure of their local. The convention delegates who are elected by the rank and 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:

- **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 Labour Congress** as well as state and local labor federations and councils.
- **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.

## Where Do Our Union Dues Go?

### **The Local Union Share (35%)**

- Representation on Day-to-Day Problems
- Grievance and Arbitration
- New Member Orientation
- Participation in Union Training
- Local Union Newspaper & Web Site Communications
- Special Benefit Plans for Members

### **The District Share (27%)**

- Data Processing and Administration
- Representation
- Education & Training
- Legislative and Political Action
- Membership and Organizing

### **The National Share (38%)**

- Data Processing, Governance and Administration
- Membership and Organizing
- Legal Defense
- Legal Advocacy
- Representation
- Communications
- Public Policy Research
- Legislation and Political Action
- Education and Leadership Development
- Women's Affairs and Fair Practices

## AFL-CIO Structure

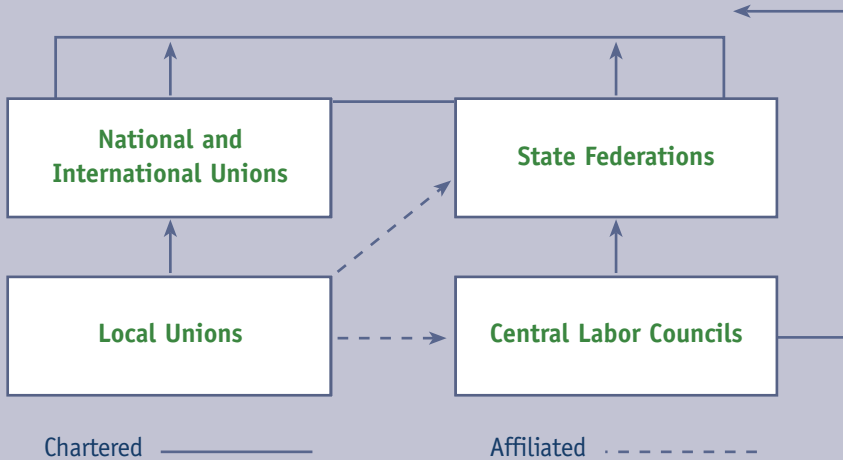
AFGE, along with 50 other national labor unions representing working men and women are affiliated with the AFL-CIO (American Federation of Labor–Congress of Industrial Organizations). The AFL-CIO's mission is to advance social and economic justice in our nation by enabling working people to have a voice 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**

Chartered by the AFL-CIO, the nearly 570 central labor councils (CLCs) give working families a voice in cities, towns and counties.

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.

## AFL-CIO STRUCTURE



### 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.

All AFGE Locals are automatically fully affiliated members of their State Federation. AFGE Locals can fully participate in their State Federation through election of Local delegates. The State Federation sends delegates to the National AFL-CIO quadrennial convention.

### 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.





## CHAPTER 3

# Fiduciary Responsibilities of Local Officers







# Fiduciary Responsibilities of Local Officers

## Fiduciary Responsibilities under the Law

Every Local president and officer stands in a fiduciary position with respect to the union and its members. The sources of that fiduciary position are the:

- Civil Service Reform Act (CSRA)
- Labor-Management Reporting and Disclosure Act (LMRDA)
- AFGE Constitution
- Local Bylaws
- Union and Local Operating Practices

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 need to familiarize themselves with the duties required of them.

## Civil Service Reform Act (CSRA)

The Civil Service Reform Act, (CSRA) establishes standards of fiduciary conduct for labor organizations representing government. The general fiduciary obligations that the CSRA imposes upon Local Officers is that they:

- Hold 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.

## Fiduciary Responsibilities under 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 and currently cover over 2/3 of AFGE membership locals.

- 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 a breach 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 in an amount up to \$10,000 and/or imprisoned for up to five years.

## 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. (The Department of Labor defines a loan as any outstanding advances of the Local union that are in excess of \$2000.) AFGE strongly recommends that AFGE Locals not make loans to members. Recovery of a defaulted loan is costly and difficult.

The possibility for 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 if they are experiencing personal or family financial crises, and their applications for a personal credit card have been rejected.

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–no more than \$2000 per officer or employee.

## Checks and Balances – Annual Local Audit

The AFGE National Constitution requires every Local to conduct an annual Local audit of its fiscal records. (Article XIX, Sec. 6). An audit is also required whenever there is a change in Local officers. The audit serves as a 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.

## LEADERSHIP TIP:

### Red Flag Items.

In the course of conducting the annual audit, pay special attention to the following seven red flag items that may indicate trouble for the Local:

- One Signature Checks
- Pre-signed Checks by One Officer
- Checks Written Out of Sequence
- Checks Written to Cash
- Checks written to Individuals
- Advance Payment of Salary to Employees
- Unbalanced Checkbooks with no Deposit Records

### Critical steps in completing 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.



## CHAPTER 4

# Setting Goals and Preparing a Local Budget





# Setting Goals and Preparing a Local Budget

## Setting Goals

Local officers are more effective when they take the time to look ahead and set specific goals for the upcoming year. The mere exercise of discussing and agreeing to specific goals can be an empowering and positive experience for the Executive Board. It also serves to unite the Board behind a common vision for the future. Goals will enable your Local to have a proactive plan, rather than reactive responses.

## Strategic Planning

At the national level, AFGE has been engaged in a strategic planning process to set goals for the National Union in addressing the challenges and crises facing government workers. At its National Leadership Meeting in August, 2002, AFGE leaders from around the U.S. called on AFGE Districts, Councils and Locals to develop strategic plans for shaping union priorities and allocating resources to support these goals.

Every Local officer has his or her own specific Constitutional duties. But the Local Union Executive Board has the collective responsibility to provide guidance and direction for the Local. To effectively carry out this task, the Executive Board can 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.

## A Checklist for Successful Planning

- Involve Local Leaders, Stewards, and Activists.
- Set Aside Time.
- Assess Where The Local Is Today. Identify Threats & Opportunities To Future Growth.
- Examine the Local's Strengths And Weaknesses.
- Develop Realistic, Achievable Goals and Objectives.
- Determine Strategies for Achieving the Local's Goals.
- Identify Tasks To Be Completed, Assign Responsibilities
- Set a Timeline For Completion.
- Allocate Resources.
- Monitor, Evaluate And Revise Goals as Needed.

## The Use of Goals in Preparing a Local Budget

Preparing a Local budget gives officers an opportunity to support the goals of the Local. When allocating the Local's income, we must ask ourselves, "What percentage of the Local's budget is allocated to this item? Are we spending too much on certain items and not enough on others? Are we allocating funds to areas, programs, and activities that help build the Local union and involve members? Are we continuing to allocate money to meet goals set years ago?"

Many Local leaders are used to a budget process that looks at line items versus specific goals. Involving key leaders and activists in developing the Local's strategic plan will increase support for establishing a local dues structure that is focused on growing a strong local union in the future.

### LEADERSHIP TIP:

#### Sample Local Goals

**Stewards:** Recruit 5 new stewards.

**Education:** Develop budget item to reimburse local officers and activists lost wages when attending AFGE training programs.

**Communications with Membership:** Set up local union's web site; Begin monthly stewards meetings; Subscribe to *Stewards' Update* newsletter.

**Mobilization:** Set-up local membership mobilization structure.

**Organizing:** Recruit 20% of non-members in the bargaining unit.

**Legislative/Politics:** Run voter registration drive; Target congressional candidate for active local support.

**Women's Affairs/  
Fair Practices:** Appoint Local Union Women's Coordinator and Fair Practices Coordinator; Send Coordinator to Human Rights Conference.

**Community Outreach:** Attend AFL-CIO Central Labor Council meetings; Participate in AFL-CIO sponsored activities.

**Health and Safety:** Conduct health and safety workplace survey.





## CHAPTER 5

# Duties and Responsibilities: **Local President**





## DUTIES AND RESPONSIBILITIES:

# 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 XV, 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.
- 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.

Your most difficult task as Local President is juggling all of these responsibilities. If you are feeling overwhelmed, perhaps you 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.

### 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. (See Chapter 16, Mobilizing Our Power).

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.

## Keep Your Fellow Officers Up-to-Date on AFGE News and Information

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

The National Union sends frequent mailings to the Local Presidents. These mailings include updates to financial documents, notice of national events, conferences, and education materials. Much of this information should be shared with the other officers. Use a simple routing slip if you are in the same office or mail copies to out of town officers. Make sure that all local officers and activists are signed up for the AFGE Action News, by logging on to [www.afge.org](http://www.afge.org).

## 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.”

### 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.

### 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).

#### LEADERSHIP TIP:

### A Checklist: Delegating

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.

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.

Provide the member the resources and authority needed to carry out the assignment.

Keep in contact with the member—to monitor progress, evaluate results, establish accountability, and give the member a way to provide information and feedback.

Give credit and praise for a “job well-done.”

**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.

## 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.
- Read key parts of reports and articles.

#### Phones

- Cut down on “phone tag.”
- Shorten phone conversations.
- Have phone numbers handy.

#### Miscellaneous

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

However, if you don’t make the difficult decisions but 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 lists of tasks you’ve created and setting priorities of what tasks will get done first. These decisions are based on dividing the tasks into three categories: (A) most important; (B) important; and (C) important enough to try to get done, but least important of the three categories. As you make these decisions, always keep in mind that the next step is to actually spend your time on the highest priority tasks.

## LEADERSHIP TIP:

### 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

**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 if you are 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 least important to get done.

**Focusing on Results.** Focus on the results of what you get done, not just how many things you cross off 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.



## CHAPTER 6

# Duties and Responsibilities: **Local Treasurer**







## DUTIES AND RESPONSIBILITIES:

# Local Treasurer

**P**rotecting the funds and assets of the Local is the fundamental job of the local Treasurer. Under Appendix B, the Local Standard Constitution of the AFGE Constitution, Article VI, Sec. 5, the Local Treasurer's duties...

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*"...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 transactions...make regular monthly reports to the NST..."*

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

- Prepare the Local budget in consultation with E-Board for approval of 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. Invest Local funds consistent with sound accounting practices and policies of the Local.

### Handling Expenditures

All union expenditures must be: Authorized, Documented, Explained and, Reported.

**Authorized.** Because of the fiduciary nature of your position as Secretary-Treasurer, the need for authorization for disbursements is greater than in a commercial enterprise. Authorization may take the form of allowances set forth in By-Laws, 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. These expenses should also be reported at the next scheduled membership meeting.

### Expense Vouchers

An expense voucher should be used by individuals to gain reimbursement for authorized personal expenses incurred in the course of union business. Local expense voucher forms can be ordered from the AFGE National Office in Washington, DC. ATTN: Secretary-Treasurer's Office.

Expenses should be turned in weekly with proper explanation of expenses, activities, and receipts which support reimbursements. Where receipts are not obtainable, appropriate explanation should be entered on the vouchers. Expenses to list on your voucher include:

## LEADERSHIP TIP:

### Getting Started as the Local Treasurer

When you begin your term as Treasurer, take the time you need to work through the documents and requirements involved in your job. AFGE's National Secretary-Treasurer's Office holds Local Secretary-Treasurer training throughout the year which will help you do your job effectively. If you have any questions about the following items ask your Local President or your AFGE National Representative.

1. Review AFGE Constitutional requirements for Secretary-Treasurer. (See Appendix B, Standard Local Constitution, Articles VI, Sections 4 and 5.)
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.
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.

**Wages.** Wages should be reimbursed weekly for lost time while on union business.

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

**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 Union policy.

**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:

##### Double Dipping-Don't

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...

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*"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."*

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**Financial Report to the Membership.** AFGE members should be encouraged to know as much as possible about the finances of their union. You can build your Local by sharing this information which helps educate members on all aspects of their union.

**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.

**LM-Reports.** 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 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 FORM SS-4 to obtain one from the IRS. If you are unable to locate the EIN for your Local, the office of the Secretary-Treasurer keeps a record of these numbers. You may secure it by calling or writing.

## 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 Financial Officer. 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.

### LEADERSHIP TIP:

#### 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. (For e.g., don't say "assets," say what your Local is worth.)
- Explain all items. Don't say "lost time," say "lost time" for stewards and officers on grievances.
- In your report, anticipate members' questions; answer them carefully and fully.

**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 an insurance guaranteeing reimbursement for 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 gross annual receipts. 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 the dues check directly to the Local Union who then remits the National's per capita. Every month, the National sends each Local an itemized report based on the membership data available from the previous month. The Local marks the report with any necessary changes and attaches it with the check for the National's per capita.

**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 Capita Tax Statement.** The Local's per capita 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.

### LEADERSHIP TIP:

#### 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 Database On The Web

Local Presidents and Secretary-Treasurers can perform all membership transactions, such as adding new members, dropping members, and making membership corrections directly on line by going to the "My Local" 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.

### **Other features of “My Local”**

The Local President and Local Secretary-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.

#### **LEADERSHIP TIP:**

### **Accessing Membership Data from the Web**

The easiest method for updating the local union’s membership database is to access these data directly from the AFGE’s web site. Here’s how:

- From web site <http://www.afge.org> click on “Members Log In”
- Log in by typing in your “User-Id”
- If you don’t have a “User-Id” you can create one immediately online
- Select the membership information you want
- Enter required information
- Click on login



## CHAPTER 7

# Duties and Responsibilities: Local Secretary







## DUTIES AND RESPONSIBILITIES:

# Local Secretary

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:

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*“...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.”*

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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 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, share responsibility for organizing and recruitment.

## Meeting Minutes: The Official Record of Union Business

Minutes are the official, permanent record of the activities and official actions of the Local. They should be retained indefinitely in the Local’s files since they may be necessary to substantiate Local actions at some future date.

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. 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.

### 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, and 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.
- Signature of Secretary.
- Approval of presiding officer.

## 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 your notes into minutes as soon as possible. If you are not sure how it sounds, read it aloud to yourself.
- ❑ 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 suggestion,” “very heated discussion,” or “an able report,” 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.

### 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.

## 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 office, files should be turned over to the new Secretary immediately.

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

A web-based grievance tracking system, “Case Track,” is now available from the AFGE National Office. (See Chapter 19 for more information).





## CHAPTER 8

# Duties and Responsibilities: Local Executive Board and Local Union Committees





## DUTIES AND RESPONSIBILITIES:

# Local Executive Board & Local Union Committees

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 plan for the year with specific goals in each major union category.
- 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. There are two types of committees: standing committees and special committees.

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 Standing Committees

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 that the Election Committee be "constituted" and its members "selected." 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 Chapter 10, "Running Union Elections," for more information.)

### AFGE Local Union Special Committees

There are three other committees that a Local may constitute: Article XIV, Section 8 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 XVIII, Section 3 of the National Constitution requires that when a member files disciplinary charges, the Executive Board appoint a Committee of Investigation.

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.

## 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 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 to talk frequently with the committee chair 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. It should include an explanation of the job of the committee and its role in the Local.

## Types of Local Committees

**Organizing Committee.** The local Organizing Committee's job is not to do all the organizing work itself, but rather to coordinate the involvement of members and stewards in organizing. The committee should address both internal organizing and new unit organizing.

**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 for Justice”, and the “Interfaith Council on Workers Rights.”

**Mobilization Committee.** This committee is 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 and/or website.

**Retirees Committee.** The committee’s primary responsibility is to organize AFGE’s Retired Member’s Club. In addition, members of the Retirees Committee 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.

#### 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.





## CHAPTER 9

# Running Effective Union Meetings





# Running Effective 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 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 get to know one another through working together.
- Educate members about union goals and plans to achieve those goals.
- 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 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.

If you are not familiar with parliamentary procedures, you may want to review this section before

## A Checklist for Running Effective Meetings

- Carefully plan and organize the meeting agenda ahead of time. This is the task of the President and the Executive Board.
- Provide the membership with advance notice. Use leaflets, newsletters, bulletin boards, and one-on-one contacts.
- Be sure the meeting space is comfortable, convenient, and accessible to all members.
- Start the meeting on time.
- 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
<b>PRIVILEGED MOTIONS</b>								
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
<b>INCIDENTAL MOTIONS</b>								
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
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, question of	Amend, reconsider limit or close privilege 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 next meeting	Amend, Reconsider, Close Debate
Postpone Indefinitely	Yes	No	Yes	Majority	No	Yes	Main motion, ques. of privilege	Limit or close debate Reconsider
<b>MAIN MOTION</b>								
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	Yes, if motion applies is debatable	No	Yes	Majority	Yes	No except adjourn, suspend rules	Any motion	Limit debate, lay on table, postpone definitely
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.

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.

## 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.





## CHAPTER 10

# Running Union Elections





# Running Union Elections

In every AFGE local, officers are elected by the total membership with elections running, on average, every three years. Who can run for elections, and the rules and procedures for how elections are to be conducted, are determined by the National Convention and spelled out in Appendix A of *AFGE's National Constitution*. In order to run for an elected office, a 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, refer to AFGE's Election Manual, available online at [www.afge.org](http://www.afge.org) under Member Resources.)*

## 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, and sending out the election notice. Ideally, following these steps will 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.

### Common Pitfalls

When local unions are in the process of conducting elections, they often 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 identify the “Dos and Don'ts” of Union Elections which 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 11

# Organizing







# Organizing

## Why Organize?

AFGE has three major union programs—organizing, legislative and political action, and representation. No one of these programs can stand alone. If one of these programs is weak, sooner or later it will weaken the whole Union.

Over the last 35 years, the public sector is the only sector of the economy that has experienced real union growth. Yet, despite this growth, only 1 in 3 of the government workers we represent are organized into AFGE. And almost 60% of our current AFGE membership will be eligible for retirement by the year 2008. Just to maintain our current membership levels, AFGE must recruit 40,000 new members each year.

Employers recognize numbers—and strength in numbers is key to the future of organized labor. Organizing cannot be viewed as a separate activity your local may or may not participate in, but must be seen as a key link increasing the power of government 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.

## Strength in Numbers

How much stronger would your position at the bargaining table be if your unit was 100% organized? Or if more than 40% of the workers in your community were organized? Bargaining a contract during a time when union membership is weak will continually frustrate and disappoint us. It is as if the unorganized workers in the same agency are sitting on the other side of the bargaining table with management, or siding with anti-worker politicians and Administration officials.

At the AFGE convention in 1997 and again in the year 2000, the delegates voted to increase support for organizing activities. A resolution adopted at the 1997 AFGE Convention provided for an additional 27 cents per member for organizing activities. At the 2000 Convention, the convention delegates adopted a resolution that called for all levels of AFGE to increase its organizing efforts. An additional 30 cents was allocated to organizing. In addition, several of the AFGE's National Representatives were converted to National Organizers to increase the Union's organizing efforts.

## 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 effort 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 that works with local union members who have an interest in becoming a volunteer organizer. After completing this training, activists are eligible for placement on a national roster of Temporary Organizers for National Organizing Campaigns and may be called on for use in District or National campaigns. *(Contact your District Office or the M&O Department for more information.)*

### AFGE's Internal Organizing Model: Issue Organizing

AFGE's model for recruiting new members and involving local members in organizing focuses 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.
- 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.

### **The Metropolitan Empowerment Initiative (METRO)**

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 week 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 workforce. Look for a leader who is outspoken and respected by co-workers. 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 co-workers and are willing to work and be public in supporting the union.

## Know Your Rights to Organize – Federal Labor Law

When you speak with government workers about organizing a union in their workplace, briefly explain to them the federal labor law as it relates to organizing. This includes their right to speak and pass out literature at work during breaks and lunch or before and after shifts. Talk with them about the FLRA election process.

Employees versus non-employees, under federal labor law, have different rights related to organizing a union in their specific work site. Employees involved in an organizing drive in their work site may distribute literature and solicit membership during non-work time in non-work areas (or in work areas if all involved are not working.)

If AFGE has not yet filed a petition with the FLRA for union representation, non-employee organizers may access the workforce in “public” areas on non-work time including meals, breaks, before and after work. (Non-work areas include the cafeteria, hallway, breakroom, sidewalk or parking lot.) During an organizing drive, federal labor law requires that management remain neutral and that they not interfere with, restrain or coerce any employee in the exercise of his or rights under the FLRA.

## 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 at the National Office.)

**New Forms of Organizing: 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.

An “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.

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.
  - **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

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.

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, using these programs can equal or exceed the cost of membership. The Legal Program alone has a value of \$150 to

\$200 a year. For detailed information on AFGE member benefits, please see “Access AFGE - a Leadership Guide for AFGE Member-Only Benefits.”

## LEADERSHIP TIP:

### Conversation Starters for Face-to-Face Organizing

#### *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...”

#### *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?”

#### *Learn about the worker and workplace:*

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

#### *If you are 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.

## 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 whether 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 including access to the workers and power over working conditions. Use of acronyms (FLRA, BUE's, ULP's, 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 with workers throughout the unit. The result, however, may be that key issues are missed, individual workers' questions are never answered, and the core group's 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 to recognize that."
- 6. Scheduling Boring and Unnecessary Meetings.** For most people, time is precious. If committee meetings turn into lectures, or "bull sessions", where nothing is accomplished, 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 on AFGE's Web site—[www.afge.org](http://www.afge.org). The section, which updates information every two weeks, provides a wealth of information to current and soon-to-be retirees. Questions and comments? E-mail [retirees@afge.org](mailto:retirees@afge.org) or call (202) 746-6707.







## CHAPTER 12

# Collective Bargaining and Representation





# Collective Bargaining and Representation

## A Brief History of Collective Bargaining

The three basic rights all workers must have to achieve fair wages, 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 1930's 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. 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.

Elected officials began to fear that the nation was on the verge of a revolution and felt something had to be done to relieve the situation and bring stability. 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. In 1969, President Richard M. Nixon issued Executive Order 11491 which expanded 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 the President 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 (FSMLRS) 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 about wages, hours, or other 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 or 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 including:

- Developing and Adopting a Bargaining Plan for the Local
- Appointing and Training a Bargaining Committee

- Educating and Surveying the Members on What They Want
- Drafting Bargaining Proposals
- Setting Ground Rules with Management
- Face-to-Face Bargaining
- Reaching a Tentative Agreement
- 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 that AFGE Locals are likely to be most involved.

Mid-term bargaining or “impact and implementation bargaining” can come up in a number of ways.

First, and foremost, management may take actions, 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. Third, there may be subjects that were not addressed in the contract negotiations, but which one side or the other now wishes to deal with.

And, fourth, the parties may simply agree to revisit certain subjects before the overall contract expires.

This authority comes from Section 7106 (Management Rights) of Title V of the U.S. Code which states in Section (b)(3) that... “nothing in 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.”

#### LEADERSHIP TIP:

#### Mid Term Bargaining Check List

1. Demand to bargain in writing (consult contract for ground rules - include agreement for interest arbitration).
2. Request a briefing by management.
3. Meet with union executive board - Identify union objectives.
4. Talk with union members - get their Input on the change.
5. Discuss possible actions with members. Recruit volunteers for bargaining.
6. Meet with unit employees to discuss possible “adverse effects.” Recruit new members and additional volunteers.
7. Develop a negotiable counterproposal.
8. Present the counterproposal to management in accordance with the CBA.
9. Communicate with unit members on the status of negotiations. Develop alternative courses of action if necessary.
10. Come to an agreement or go to impasse/arbitration.

*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.*

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.

### Do's And Don'ts In Negotiating The Contract

There are several things to keep in mind to ensure that your contract negotiations are successful. The following lists some "Do's and Don'ts" for bargaining an effective contract.

#### DO:

- 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.
- 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 department.
- Check the final contract draft to make certain that the language is the same as originally agreed.
- Keep the membership informed.

## LEADERSHIP TIP:

### Six Basic Skills in Bargaining

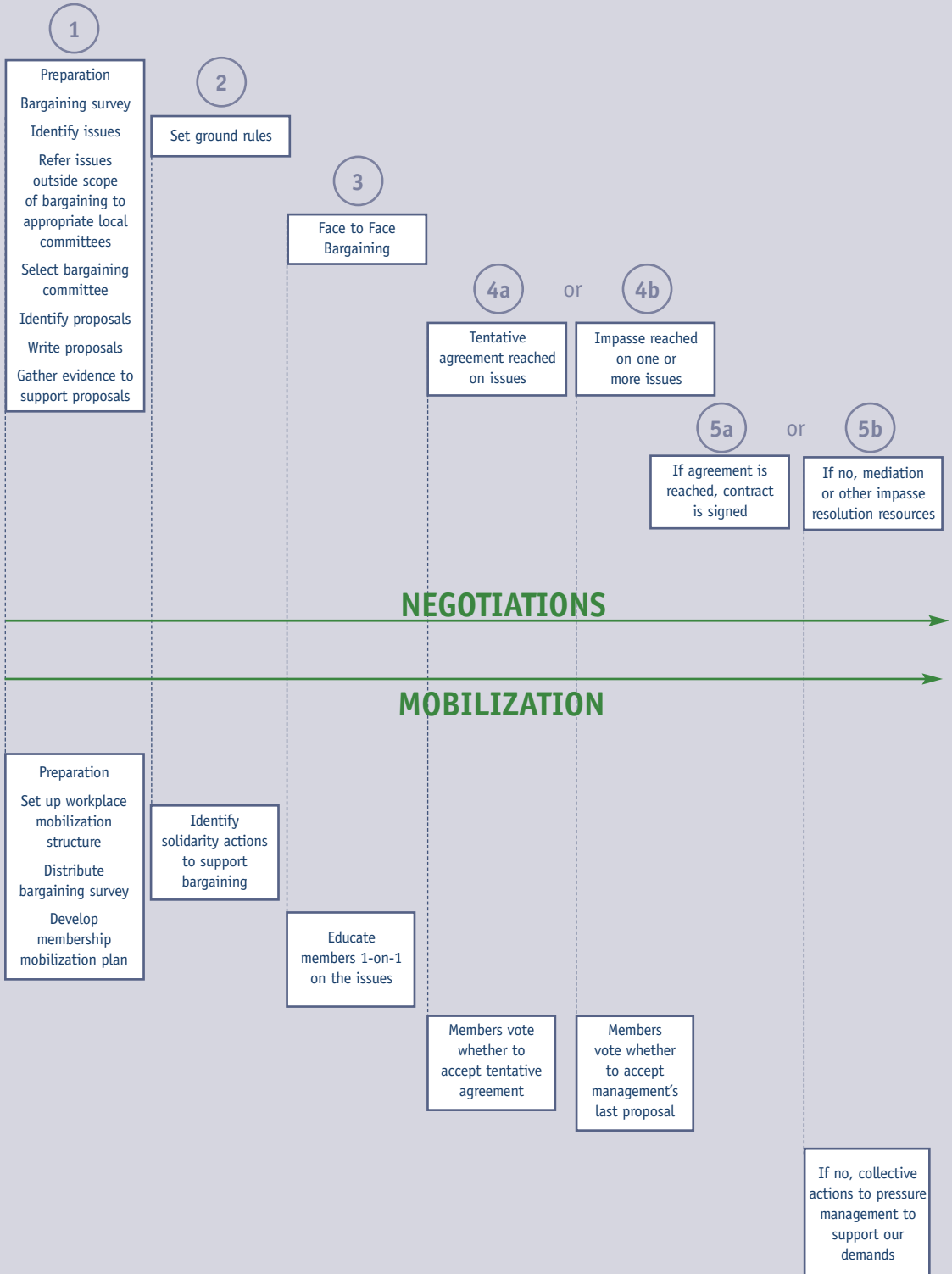
You can ensure a more successful negotiations process for your Local and for your bargaining team by following some basic skills:

- **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.

### 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.

## THE WHO, WHEN, WHERE AND HOW OF AFGE NEGOTIATIONS







## CHAPTER 13

# Legislative and Political Action





# Legislative and Political Action

## Legislative and Political Action

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 the Local Union President, work with your Legislative and Political Action Committee to keep the membership well informed on 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, Action Faxes, and e-mails. 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.

#### LEADERSHIP TIP:

### Profile Your Member of Congress

The more information we have about the politicians who represent us, the more we can influence a Member'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.

### 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 that covers this right is 5 U.S.C. 7211 which states:

This 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").

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*"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."*

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### 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 inform the member at 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.

## AFGE Volunteer Corps (VAC)

The Volunteer Action Corps is currently made up of over 1500 AFGE members who are actively involved in educating and mobilizing other government employees on workplace issues that directly affect our jobs, our families, and our communities.

Volunteer Action Corps volunteers are engaged in a variety of education and mobilization activities including: distributing flyers and talking with co-workers about workplace issues; helping out with Lunch and Learns and Union Fairs; communicating with members by setting up and participating in phone banks; getting involved in media outreach; and researching changes in the federal personnel policies and their impact on government employees. Volunteers become automatic subscribers to AFGE's Action News and Alerts, receive national recognition for their volunteer efforts, and are eligible to earn college credit for their service activities. *To join, log on to [www.afge.org](http://www.afge.org).*

## 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 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.

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.

#### LEADERSHIP TIP:

##### Hints 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.

## Legislative and Political Action Checklist

- ❑ 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.





## CHAPTER 14

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





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

## 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 in the workplace. The Fair Practices Department is charged with working to eliminate discrimination in the Federal and DC Governments and within AFGE.

## Human Rights Committee

To accomplish its program goals of education and training, member mobilization and legal representation, the Departments work with a 24 member advisory board, AFGE's Human Rights Committee (HRC). 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. His or her 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 Women's and Fair Practices Committees and recruiting members to serve.
- Writing articles for local newsletters.

## 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. 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 women's and civil rights. 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:

- Non-discrimination
- Pay equity
- Training and promotion
- Leave policies
- Sexual harassment
- Child care
- Reasonable accommodations
- Sexual orientation

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 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 that AFGE leaders and activists can join to increase our power in winning fair treatment at work. Some of these groups include:

- Asian Pacific American Labor Alliance (APALA)  
1101 14th Street, NW, Suite 310  
Washington, DC 20005  
(202) 842-1263
- Coalition of Labor Union Women (CLUW)  
1126 16th Street, NW  
Washington, DC 20036  
(202) 466-4610/4615
- Coalition of Black Trade Unionists (CBTU)  
P.O. Box 66268  
Washington, DC 20035-6268  
(202) 429-1203
- Labor Council for Latin American Advancement (LCLAA)  
815 16th Street, NW, Suite 310  
Washington, DC 20006  
(202) 347-4223
- Pride at Work (PAW)  
c/o 501 Third Street, NW, Suite 200  
Washington, DC 20001-2797  
(202) 637-5085
- A. Phillip Randolph Institute (APRI)  
1444 Eye Street, NW, Third Floor  
Washington, D.C. 20005-2210  
(202) 289-2774

## Education and Training for Equal Rights Advocates

Every year, except convention year, AFGE's National Women's and Fair Practices Departments sponsor the Human Rights Conference. Included in this conference is basic and advanced instruction for Local and District EEO practitioners and equal rights advocates. The skills based training covers a wide range of civil, human, women's and workers rights. Additional training is offered through District Leadership Meetings. *(For information on training opportunities, contact your District Office or the National Women's and Fair Practices Departments.)*

## Staying Informed: The Equalizer and The EEO Advocate

The Women's and Fair Practices Departments publish two newsletters, *The Equalizer* (a bi-monthly) which provides news and information about legislation, grassroots campaigns, and issues of importance to the civil rights, human rights, and workers rights communities. *The EEO Advocate* is distributed quarterly and is geared towards EEO activists who want in-depth information on issues related to EEO and Civil Rights laws. *(Log on to [www.afge.org](http://www.afge.org) to view current and past issues of The Equalizer and the EEO Advocate.)*



## CHAPTER 15

# Union Communications







# Union Communications

Communications is a vital function of the local union. AFGE's voice must be heard not only by our members and potential members but by the general public in our communities.

## Communicating with the Membership

Communicating with members and non-members falls into two categories—personal contact and formal communications. As a local leader, be sure to organize as much person-to-person contact as possible. Then supplement the personal contact with more formal communications—a regular newsletter or newspaper, membership surveys, bulletin boards, and a local union web site.

### Worksite Visits

Communications is not only sending messages to others; it is 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.

### Create a Local Communications Committee

Local leaders need to make internal communications a priority. The most effective way to do this is by creating a Local Union Communications Committee. 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

#### 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.

with internal communications? Clearly define the roles and expectations of the Committee's members. Make sure that they have the resources and tools they need to create quality communications.

### Newsletters

Each local union should have a regular newsletter or newspaper 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.

Establishing an editorial policy and production guidelines for the publication will help to keep the Local's newsletter consistent and in step with the goals of the union.

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 pictures and graphics and be attractively laid out. Ideas for newsletter articles can include:

- Stories about relevant professional 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.
- Surveys on relevant issues.
- Reviews of relevant books and reports.
- Announcements about union meetings.

#### LEADERSHIP TIP:

#### 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.

#### Creating Online Union Communications

The Internet is an invaluable tool for effective union communications. Employees who can't attend union meetings can receive electronic communications from the Local to keep them informed of union issues and activities. Several AFGE locals have established their own local union web sites. The Local Communications Committee should determine which types of electronic communications best serves the overall communications goals of the Local. For example, does the Local want to create a local union web site or would an electronic bulletin board that reaches members via e-mail better serve its communications needs?

*(For information on how to set up a local union web site, log onto [www.afge.org](http://www.afge.org).)*

- **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.

## AFGE Communications Resources

**AFGE Action News.** The AFGE Action News is an e-mail service maintained by the AFGE National Office that provides registered members with the latest AFGE news on issues most important to government employees including pay and health care benefits. It's also a resource to learn about upcoming AFGE conferences and trainings.

**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.

**The Capital Report** is a bi-monthly publication that covers not only legislative activity on Capital Hill, but also at the White House, OMB, OPM and other federal agencies. The Capital Report focuses on the efforts of AFGE's legislative department as well as the work by locals and grassroots activists.

**AFGE.org** is home to AFGE's web site, which contains a wealth of information on issues, events, and resources. The MYLOCAL section of AFGE.org enables Local presidents and treasurers to maintain their membership roster and review important financial information.

**Education.afge.org** is home to AFGE's Education and Leadership Development web site. There is a special section devoted to local union leaders that provides advice, tools, and training for union activists.

**UnionBlog.com** is a forum for AFGE members to sound off about issues and exchange ideas with their union sisters and brothers. Blogs, short for web logs, are sources for news and information commentary on the Internet. UnionBlog became the first such site launched by a national union when it was opened in November 2003.

## 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 it has no control will shape the public's perceptions 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 well being of all citizens, not just the job security of its own members. Community service's 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.

## Media Outreach

The news media communicates images and messages about AFGE to the general public. They are the primary source of information that shapes the public's attitudes towards labor unions. Thus, developing a relationship with the media is a key strategy for increasing the local union's public image.

**News Reporters and Editors.** Cultivating personal relationships with reporters is one of the most important tasks 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. And we have the raw materials they need to do their jobs—newsworthy events, expert testimonies, and human interest stories. Get to know the editors and key reporters of the local newspaper and TV and radio news. Meet with them regularly—invite them to union functions. Provide them with research, background information and story leads whenever possible.

The "media list builder," available at [www.afge.org/listbuilder](http://www.afge.org/listbuilder), provides contact information for the media in your area. Get your information about to area radio and TV, daily and weekly newspapers, and wire services such as the Associated Press (AP) and Reuters.

If asked for an interview, inquire about the topic prior to agreeing to be interviewed. If you are 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 calls or questions from the audience. If the report works for a print publication, ask who else the reporter has interviewed.

## News Releases

Much of the news that is printed or broadcast originates with news releases. A news 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. Samples of advisories and releases are available in the Communications Guide of the AFGE website.

It is important that a news release be well prepared or it will end up in the Editor's trash can.

## Tips for Reaching Out to the Media

- ❑ **Develop Media Lists.** Develop a core media list of reporters for use in distributing news releases. Include local radio and TV, daily and weekly newspapers, and wire services such as AP and Reuters.
- ❑ **Never Lie to a Reporter.** It will ruin your integrity and credibility. If you can't answer a question, tell them you will get back to them—and make sure you do it.
- ❑ **Don't Use Unfamiliar Terms or Jargon.** Acronyms and jargon sound like a foreign language to reporters. Use terms that mean something to people.
- ❑ **Always Return A Reporter's Phone Calls.** If you don't, they will stop calling. 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 dramatic human interest stories, poignant anecdotes, as well as 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.
- ❑ **Keep Your Personal Opinions to Yourself.** No matter how much you qualify the statement, it will be attributed to the Local.
- ❑ **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 or intolerant.
- ❑ **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 their money's worth from their federal government."
- ❑ **Don't Take it Personally.** Sometimes you won't get any media coverage despite the best of 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:

### Guidelines for 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.

### Media Interviews.

When it comes to interviews, there are three golden rules: 1. Use your message as the basis for your answers, 2. Don't say anything you do not want to see in print or on TV; and 3. Stop talking once you have made your point.

Reporters may use a person's natural tendency to fill uncomfortable silence with chatter. It is when people attempt to fill such silence that they are likely to say something off message, inarticulate, off color, embarrassing, or damaging to their cause. Remember the reporter is responsible for the interview. Just sit out the silence and remain composed. If you are offered the opportunity to add any comments at the end of the interview, just repeat your message.

### Getting Free Media

In addition to issuing news releases, local leaders can utilize other opportunities for free media or PR. Letters to the Editor, 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 President 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. And refine your responses; have ready in advance one concise quote (the Local's "message") 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, and 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?"

## Balance of tone

Messages should strike a balance of tone so as not to turn off the intended audience. How you say your message is as important as what you say. Remember, you are appealing to the general public for their support. Here are some tips to remember.

- Be agreeable, but contrast with the opposition.
- Be truthful, but focus on the union's position.
- Be informative, but not condescending.
- Be confident, but not self-righteous or arrogant.
- Instill sympathy, but don't get "whiny."

## 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 the local chamber of commerce 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.

## LEADERSHIP TIP:

### Event Roles and Consideration

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

### Scheduling

News cycles should be considered when scheduling events. It is helpful to know the deadlines for local reporters (usually 5 p.m., but it could be earlier in the day). Generally, it is better to schedule an event midday during the middle of the week. It is generally not a good idea to schedule an event before 9 a.m. any day of the week, before 11 a.m. on a Monday or after 2 p.m. on a Friday. At times, you may wish to hold numerous events in one day (e.g. a rally and then a march). If so, it is generally best to schedule multiple events back to back so reporters can cover both events in a short period of time. Back to back events also help to maintain the enthusiasm of participants. Try not to schedule you event(s) at a time that competes with events sponsored by other organizations.

### Location

The location of an event can add symbolism or drama. If possible, pick a setting that visually symbolizes or reinforces your message. For some locations, it may be necessary to obtain a permit. If an event is held on a government facility, it may be necessary to make arrangements in advance so the press will be granted access.

### 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. The Media List Builder on the AFGE web site ([www.afge.org/ListBuilder](http://www.afge.org/ListBuilder)) provides contact information for the media in your area. In general, you should fax or email a copy of the media advisory for your event to the assignment editor or the news desk of the media outlet. You may wish to call before sending the advisory. Just tell the person what your event is and when. You will usually be asked to send a copy of the advisory. If you send the advisory first, be sure to call that same day to confirm receipt. Follow up with the media the next day, and be sure to follow up on the day of the event.



## Day of Event

Reconfirm roles with participants and volunteers. You may wish to have a press packet on site that includes the advisory, list of speakers with title, press release, information on the Local, etc. Be sure that someone is designated 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. Don't forget to have fun.

## After the Event

You may wish to 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 on-site. 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.

The AFGE Editors Association, supported by AFGE's Communications Department, provides local newsletter editors with a monthly packet that includes stories, cartoons, and graphics. The Department also sponsors an annual training conference for AFGE newsletter editors.

### LEADERSHIP TIP:

#### Customizing AFGE Press Releases

At times, Locals may want to adapt a news release from AFGE national headquarters. Type up a modified press release on the Local's own letterhead (or just create a cover sheet to the existing press release) and include your Local's angle on the subject. Include quotes on the issue from the Local President and incorporate examples of how the issue affects government employees in your area.





## CHAPTER 16

# Mobilizing Our Power





# Mobilizing Our Power

## Why Mobilize?

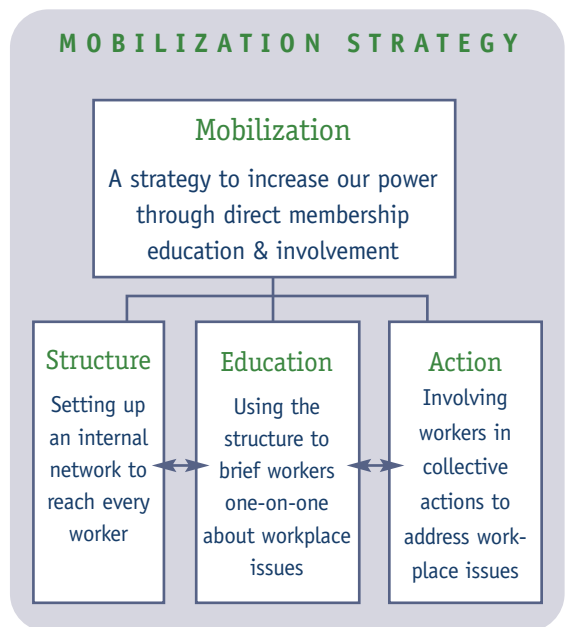
AFGE, like most unions, is only as strong as its member involvement. Organizing, problem solving at the work site, political action and contract negotiations all rest on the union's ability to sign up more members and increase their involvement. Yet, in our Local unions, there is often a tendency to view "individuals" (experienced, bright union leaders) rather than the membership, as the source of our power. We can become too reliant on the crafty union negotiator, the clever chief steward, and the effective local president to solve our problems. But these strategies by themselves will not increase our strength.

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 3 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 allows us to systematically, through an internal structure, 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 the workplace structure, which allows the union to communicate one-on-one, worker-to-worker, with every single member in a short period of time. Without a good 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. Suggested steps in building the Local mobilization structure include the following:

1. The Local Union President appoints a Local Mobilization Coordinator (LMC) who is responsible for setting up a communications network in each building location, establishing a calendar of mobilization activities and coordinating follow-up on the plan. *(Note: If there is more than one bargaining unit in your local, you may need a Local Mobilization Coordinator for each bargaining unit.)*
2. The Local Mobilization Coordinator (LMC) sets up the internal structure by compiling a list of all work locations where the Local has members, and identifying the number of bargaining unit members in each work site and the percentage of these workers who are members of AFGE. *(See "Building Location Worksheet")*
3. The LMC recruits a Building Mobilization Coordinator (BMC) for each work location or work site and records their names on the "Building Location Worksheet."
4. The Local Mobilization Coordinator brings together all of the Building Mobilization Coordinators for a brief training and overview of membership mobilization.
5. The Building Mobilization Coordinators (BMCs) recruit Work Group Mobilizers (WGM), one for every 10-20 members. The BMC records the names of Work Group Mobilizers for each building location or work site on the "Building Location Worksheet."
6. Each Building Mobilization Coordinator (BMC) should bring together their Work Group Mobilizers (WGM) to review membership mobilization and outline their roles and responsibilities. Every Work Group Mobilizer identifies the number of bargaining unit members in their specific work area and the percentage of these workers who are AFGE members. *(See the "Work Group Mobilizer Worksheet")*.
7. The Local Mobilization Coordinator (LMC) follows-up to make sure every workplace and every Local member is reached through the mobilization structure.

## LEADERSHIP TIP:

### Workplace Mapping: A Tool for Building a Communications Network

One tool for building a communications network is mapping. Mapping gives you a visual tool for identifying *who* everyone is in the local and *where* they are located. Once you have a visual picture of who's in your bargaining unit (or the worksite you are assigned to represent) 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 you can recruit to help organize and mobilize their co-workers; develop a schedule of regular visits to particular locations, 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 displayed in the front of the phone directory. Blow this map up and it will provide you with a physical layout from which to map your Local*) and (2) collecting data on the individual members of the bargaining unit you wish to place on the map.

**Using Surveys to Collect Baseline Data.** One way to get the data you need is to ask members directly for it. A good service activity might be to have stewards go around to BU members and ask them directly for their contact information. This is an easy opportunity to get in front of the

members, let them see who you are, and gives you a chance to 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.

The survey form completed by a bargaining unit member should be formatted so that it is easy to complete, so that it covers everything you will need to gather, and so that transferring data from the form to a computer will be efficient (*if that's the format you choose to use*).

**Employee Rosters.** Another valuable tool for gathering data on how to reach members of the bargaining unit is the Employee Work Group Roster. For example, the VA has an employee work group roster that lists the employee's name, job title, 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.

Once you have acquired the data, use it as an opportunity to talk with members one-on-one to make sure the information you have from HR is correct. Be sure to include all the data you will need for different purposes: sending out birthday cards to local union members, contacting them at home by email for political events, targeting recruitment, etc.

## LOCAL UNION MOBILIZATION STRUCTURE

### Local Union Mobilization Coordinator

Coordinates mobilization effort within and between bargaining units, recruits and trains local work site coordinators, troubleshoots, and evaluates how well the mobilization structure is working in their local.

### Work Site Mobilization Coordinators

One for every government location. Coordinates mobilization effort in their work site, recruits and trains workgroup mobilization coordinators, troubleshoots, and reports back how mobilization is going in their location.

### Workgroup Mobilization Coordinators

One for every 10-20 workers in a work location. Engages in brief, one-on-one contacts with individual workers, answer questions, and brings back workers' concerns to the work site coordinator.

### Members/ Workers

Local union members and workers are contacted one-on-one by workgroup mobilizers. Educated on work place issues and asked to support and participate in collective actions.



## **Building a Local Mobilization Structure – First Steps**

Local \_\_\_\_\_

Bargaining Unit \_\_\_\_\_

<b>Building or Work Site Location</b>	<b>Number of Members</b>	<b>Number of Potential Members</b>	<b>% AFGE Members</b>	<b>Building Mobilization Coordinator</b>	<b>Number of Workgroup Mobilizers Needed</b>
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

## Checklist for Setting Up a Local Union Mobilization Structure

- Secure support from local leaders. Is everyone on board?
- Appoint Local Mobilization Coordinator (LMC).
- Compile a list of all work locations or buildings that are represented by AFGE. Identify the percent of members and potential members in each location.
- Recruit one Building Mobilization Coordinator (BMC) from each work location.
- LMC meets with BMCs to brief them on mobilization, and review their roles and responsibilities.
- BMCs recruit Work Group Mobilizers (WGMs)—1 for every 20 workers.
- Each BMC meets with WGMs to brief them on mobilization and review their roles & responsibilities.
- Work Group Mobilizers (WGM) establish lists of one-on-one contacts, and record each contact and outcome.
- LMC follows-up to make sure every workplace & every member is reached. Meets regularly with BMCs to review and revise structure as needed.
- When a coordinator drops out or leaves, replace them immediately to maintain the structure.

## 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. These contacts are two-way discussions—the workgroup mobilizer shares information and the member often offers feedback or asks questions.

The mobilization structure is used to deliver one-on-one education issues. The education is carried out by the Work Group Mobilization Coordinators who 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 (5 minutes), but the mobilizer often leaves the worker with an education piece that contains information on the issue. The coordinator may also ask the member to join an action in support of the issue. *(For example, wear an AFGE pin, sign a postcard, fill out a survey, etc.)*

## Building a Local Mobilization Structure – Work Group Mobilizers Chart

Local No. \_\_\_\_\_ Local Mobilization Coordinator \_\_\_\_\_

Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Email \_\_\_\_\_

Building Location	Building Mobilization Coordinator	M	PM	%M
	Name: Address: Email: Phone: Cell Phone:			
Work Group Location	Work Group Mobilization Coordinator	M	PM	%M
	Name: Address: Email: Phone: Cell Phone:			
	Name: Address: Email: Phone: Cell Phone:			
	Name: Address: Email: Phone: Cell Phone:			
	Name: Address: Email: Phone: Cell Phone:			
	Name: Address: Email: Phone: Cell Phone:			

**M = AFGE Member**

**PM = Potential Member**

**%M = Percent AFGE Members**

## LEADERSHIP TIP:

### One-on-One Education Materials

There are two pieces of material used in one-on-one, contacts - an education piece and “yeah...buts.”

**Education Piece.** The issue flyer provides substantial information and insight on a particular subject to help members better understand the issue they are mobilizing around. This is the information piece which Work Group Mobilization Coordinators give to workers to explain and discuss the issue.

**Yeah...Buts.** This is a list of several possible objections which workers might offer when contacted one-on-one. For example, “Yeah...but why should I care about the government privatizing my job? I’m retiring next year.” The “Yeah...Buts” prepare Building and Work Group Mobilization Coordinators for worker objections and provide them with possible responses.

### Why One-on-One Communication?

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

- Reach 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. One-on-one requires that you not only talk but listen as well. 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 break, lunch and in hallways about workplace issues and the fight. The union comes alive to people and it gains credibility and visibility.

### Collective Actions

Collective actions build 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 from wearing the same shirts or buttons to work, to sending action faxes, standing up at the job, participating in rallies, and lobbying Congress. Collective actions:

- Allow members to participate directly, increasing their feelings of solidarity.
- 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 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.

## 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 and straight - don't say it requires 2 hours a 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 and not an open-ended commitment 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 how their part will contribute.
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/recognize volunteers.**
11. **Get the best volunteers more involved.** Slowly 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.





## CHAPTER 17

# Welcoming New Members







# 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.

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

## LEADERSHIP TIP:

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

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

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

## 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 time for new worker orientation, negotiate this contract language during the next round of collective bargaining. Encourage stewards to conduct the orientation as soon as possible after the worker begins their job or the new member is recruited.

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. This packet can include a profile of AFGE, a listing of consumer benefits available only to AFGE members including legal, credit cards, and auto buying, a listing of AFGE achievements, as well as specific information about the Local. *(Contact your District Office or the M&O Department for information on materials.)*

You may also want to include a welcome letter *(see sample on next page)* and a recent issue of your Local newsletter.

## Sample New Member Letter

The following sample letter can be included in your new member packet.

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.

At 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

## How to Conduct 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:

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*“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?”*

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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.

## 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.

## Differences Between A Union And Non-Union Workplace

We sometimes take for granted the protections the union provides for us on the job, and the difference a union can make in the way we are treated at work. It's worth reminding ourselves what things would be like without a union.

### 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.

### **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 70 years. 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. Tell the new employee that once they sign up, their union dues will be approximately \$25 a month, and will be 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.

### 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 see the Education Department's publication, "AFGE Leader's Guide to Conducting a New Employee Orientation.")*

### Why do I Need A Union?

Without a union, we have little power on the job. Think about it. 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:

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*"...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 wages he 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)*

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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.





## CHAPTER 18

# Building A Stewards Structure







# Building A Stewards Structure

**I**t 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 everyday when they go to work. In the eyes of most AFGE members, stewards are the union.

Stewards take on a number of roles in the workplace—reaching out to new members, settling grievances, creating 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 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 steward's training class, the new steward should be paired with an experienced steward until they feel comfortable with the basics.

## 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 workplace 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 typed Stewards' Bulletin that is distributed weekly or monthly. In order to reach stewards quickly, establish a phone tree, or e-mail network, to relay meeting notices and other short messages to stewards.

## 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."

## 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 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. Your role is to encourage their growth and provide support.

*(For more information on Stewards, see AFGE Education's publication, "A Stewards Handbook.")*

### 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 "burnout" include changing their work assignments, cutting back on the steward's union workload, or providing new training opportunities.





## CHAPTER 19

# Grievance Handling and Arbitration





# Grievance Handling and Arbitration

**A**s 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 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.

## A 5-Step Approach to Grievance Handling

Each work day, 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 very 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.

### 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.”

## 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 other reason.

## 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 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 your duties in the most effective manner possible.

### LEADERSHIP TIP:

#### **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.

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.

### 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 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 grades, reductions in pay, hazardous duty differentials, or overtime pay), AFGE's National VA Council (NVAC) recently hired its own attorney who is now a permanent member of the General Counsel's Office (GCO), handling legal affairs, VA negotiations and litigation at all levels exclusively for the NVAC.

For nearly 20 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 can not 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 \$1 million 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 CaseTrack 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.

CaseTrack has been designed to be user-friendly. All of our locals, councils, and NR - every case we have—will be entered into 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.

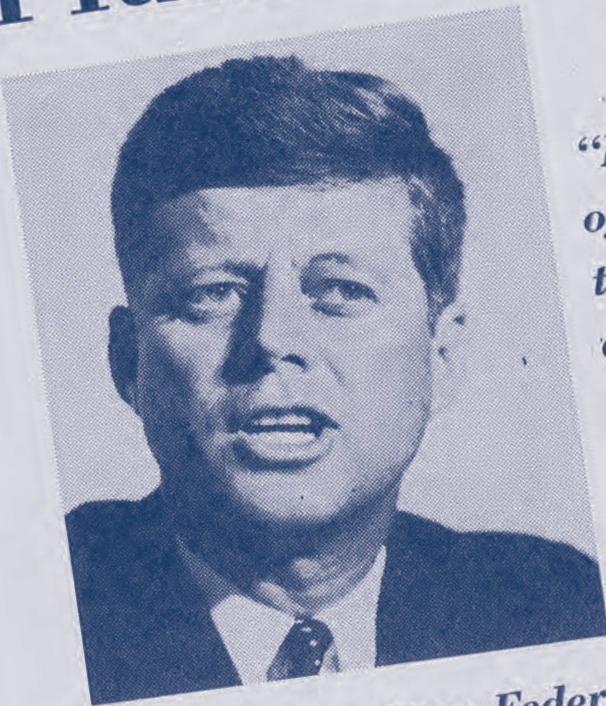
Tracking will allow AFGE leaders to spot trends, to identify trouble spots in representation and document those cases involving the Administration that can be acted on at the Local level. For more information, go to [www.afge-casetrack.org](http://www.afge-casetrack.org).



## CHAPTER 20

# AFGE History

# PRESIDENT KENNEDY On Employee Unions



*“I have always believed that the right of Federal employees to deal collectively with the Federal departments and agencies in which they are employed should be protected.”*

From a letter written by Mr. Kennedy one week before he was elected President

“The American Federation of Government Employees has been broadening and deepening its Government...”



# 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 printers, 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 the past 70 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.

## 1932 - 1952 *(continued)*

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.

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 E010988 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.

## 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.

## 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 E011491, 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 clean up federal prisons after several AFGE prison guards are killed and assaulted.

In 1985, AFGE wins \$3.75 million class action suit against Warner Robins 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 out work 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.

## 1982 – 1992 *(continued)*

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 E012871 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 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 grassroots 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. “Vision 1999 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 biggest 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, over 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

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 for 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.

## 2003

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

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.

## 2005

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.

## 2006

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.





AMERICAN FEDERATION OF  
GOVERNMENT EMPLOYEES, AFL-CIO

Education and Leadership Development Department  
80 F Street, NW  
Washington, DC 20001

[www.afge.org](http://www.afge.org)

[education.afge.org](http://education.afge.org)

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