

AFGE New Officer Training

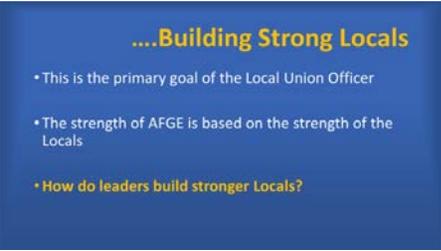
Instructor's Guide



Slides and Support Materials	Steps for Instruction/Talking Points	Notes
	<p style="text-align: center;">INTRODUCTION AND COURSE OBJECTIVE/PURPOSE</p> <p>What to Do: 1. Welcome participants to the New Officers Training:</p> <p>Suggested Language: Hello my name is ___ I am the ___ at ___. Welcome to AFGE's New Officers Training. This training has been designed to enlighten you on your roles and responsibilities as Leaders in this organization. While there is no cookbook or exact formula to how you conduct yourselves as Leader, there are practices, and procedures that are common in this org to follow as well as some laws, statutes, and constitutional guidelines. We will discuss requirements as to what your role is and how you operate in it. In addition, we will be offering you tools to help you build a healthier local.</p> <p>Building a healthier, stronger and more effective Local is the ultimate goal. As a leader you are in service to your Local and AFGE's members. You are in a position to help build the union which is something that AFGE leaders from around the country agreed to be a priority in 2013 at the National Convention. At that convention, we created a shared vision for the future of our union and we called it Big Enough to Win.</p>	
	<p style="text-align: center;">Big Enough To Win</p> <p>Suggested Language: How many people here was at the 2013 National Convention? (Ask if they would like to describe a short review of what they remember about BeTW).</p> <p>In sum, BeTW The Big Enough to Win plan united AFGE leaders at all levels to:</p> <ul style="list-style-type: none"> ■ Organize more members to become stronger. ■ Build our legislative and political power. ■ Strengthen every local. ■ Increase quality and quantity of training and communication. <p>As we move along in this training, keep in mind this BeTW plan and the key aspects because this is truly the framework for how you build a strategy to making your Locals stronger.</p>	

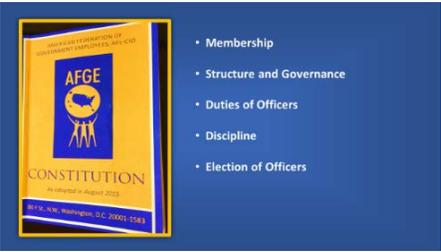
	<p>Throughout this course it is critical to know that AFGE's perspective about building strong Locals is rooted in the BIG ENOUGH TO WIN framework. We will be having a continuous discussion about what it means to be BIG ENOUGH TO WIN but everything we just talked about regarding building strong/effective Locals is directly tied to being BeTW.</p>	
	<p style="text-align: center;">COURSE OBJECTIVES</p> <p>Suggested Language: "Here are our objectives for this course. Can someone read the first objective? (Have a participant read the course objectives off the slide). Suggested Language: Among the top desired qualities for a leader (including charisma, vision-oriented, and social able) knowledge and expertise usually lands at the top of the list. The purpose of this course is to give you pertinent foundational information that you need to know as you start or continue your journey as a leader within AFGE. As we will discuss in this course, there are a lot of resources out there, particularly on the wonderful world-wide web, for you to access. What is important is that you keep yourself educated and in tune in your role as a Union Officer.</p>	
	<p style="text-align: center;">COURSE OVERVIEW</p> <p>Suggested Language: •Timeline: In order to achieve these objectives, we will be in this learning community together for three days. In the beginning of this course, we will talk through federal law, we will then move into the AFGE Governance, and Structure, followed by overall legal and fiduciary responsibilities, which will be a hefty part of this course because of the significance of these responsibilities. •Course Materials/Resources: 1. Walk participants through the materials that they would need for the session which is primarily the participant workbook, a writing utensil (for in person trainings), and any handouts that may be specific to your Region/ District or Local. 2. Briefly walk through the contents of the Participant Guide, pointing out the major sections, and explaining how the guide will be used. 3. Tell participants that we will peruse through several resources online as well, and that they are encouraged to take notes on those resources, including web address if not already provided in the PW.</p>	<p>Make sure everyone has the AFGE Constitution, the AFGE Local Officers Resource Guide, and the Participant Workbook.</p> <p>Materials Needed To facilitate this section, you will need flipchart and markers</p>

<p>What Norms can we Abide by in this Learning Community?</p>	<p style="text-align: center;">NORMS</p> <p>What to Do:</p> <p>Using flipchart paper and markers to write down responses:</p> <p>Tell participants that in order to make this course successful, and make the best learning community we could possibly make, lets establish a set of norms that we can abide by throughout the duration of this course. We do this a lot, and it often becomes mundane, but this is a pretty long course, so I want you to really give it some thought, As we interact with each other, and as we work together, what would be most helpful for you to learn? What ground rules should we establish?</p>	<p>Materials Needed: Flipchart Paper Markers</p>
<p>What are your Expectations from this Course?</p>	<p style="text-align: center;">EXPECTATIONS</p> <p>What to Do:</p> <p>Using flipchart paper and markers to write down responses:</p> <ol style="list-style-type: none"> 1. Ask participants what they are expecting to get from this course 	<p>Materials Needed: Flipchart Paper Markers</p>
<p>INTRODUCTIONS</p> <ul style="list-style-type: none"> • WHAT IS YOUR NAME? • WHAT LOCAL ARE YOU FROM? • WHY DID YOU BECOME A LEADER IN THE UNION? 	<p style="text-align: center;">PARTICIPANT INTRODUCTIONS</p> <p>Suggested Language: You are all here because you serve in a leadership capacity in your Local or possibly will be serving in one. I want you to take 1 minute (literally) for some personal reflection and respond to the following question, “Why did you become/or have an interest in becoming a leader in AFGE?”</p> <p>What to Do: After 1 minute:</p> <ol style="list-style-type: none"> 1. Pair the participants together, and let participants know that they will get to know another participant a little better and that they are going to be introducing their partner. 2. Have them introduce themselves to their partner(s) by name, what local they are from, and share with them why they became a leader in AFGE. 3. After 5 minutes (timing depends on the number of participants, allow more time for more participants) start calling on people to introduce their partner(s). 4. During the introductions: <ul style="list-style-type: none"> • Chart key words (values) as to why they became leaders. • Compare/contrast reasons participants became leaders. • Connect their values to AFGE’s values. 	<p>Materials Needed: You will need flipchart paper and markers.</p>

	<p style="text-align: center;">BUILDING STRONG LOCALS</p> <p><u>Suggested Language:</u> Speaking of shared purpose and shared goals... You all have been attracted to union leadership for different specific reasons, but it is largely because you all in some way or the other share similar values. One of those values, I am sure is that you have a desire to see and build stronger Locals (which in turn of course increases our ability as a union to better service our members—which is always the bottom line of the work that we do). The primary goal as a leader is to build stronger Locals. AFGE the union, is only as strong as its Locals. So, the question is, what does that mean exactly? What do you think it means to build a strong Local? (<i>Solicit comments from the participants</i>).</p>	
	<p><u>Suggested Language:</u> Thank you for all of your responses. All of those are good ways to think about how we as union leaders build stronger Locals.</p> <p style="text-align: center;">•<u>Three Key Functions of AFGE:</u></p> <p>In thinking through how you as a leader build a stronger Local, keep in mind that AFGE has three key functions that the union focuses on and these are Organizing, representation, and legislative and political action. These key functions are essentially the guiding light to the work that we do, the programs we plan and implement and most importantly the decisions that we make.</p> <p style="text-align: center;">•<u>Involving and Educating the Membership:</u></p> <p>A huge percentage of our leadership efforts should be focused on increasing activism of our members. Member mobilization is very important in building a stronger Local. Grassroots membership support and involvement is the foundation to every Local. When we get our members involved and active, in order to retain them we must educate them on the union difference, important union skills like organizing or political action. We educate our members through 1:1 contacts, and 1:1 communication, Lunch and Learns, and of course more formal training settings that they have the opportunity to attend.</p> <p style="text-align: center;">•<u>Identifying and Encouraging New Leaders:</u></p> <p>Building strong Locals mean building a secondary leadership base. As leaders, it's important to develop potential leaders by encouraging them and giving them more challenging union assignments. This will develop their confidence and commitment.</p>	

	<p style="text-align: center;">LABOR HISTORY</p> <p>What to Do:</p> <ol style="list-style-type: none"> 1. Ask participants about key significant times in history where the labor movement change the course of history 2. Divide the class up into small groups and give each group a piece of flipchart paper for them to write down their answers 3. Let them work together as a group for about 20 minutes 4. Allow each group to report out 	<p>Materials Needed:</p> <p>You will need flipchart paper and markers.</p> <p>Flipchart paper for each group</p>
	<p style="text-align: center;">AFGE HISTORY (GROUP WORK)</p> <p><u>Suggested Language:</u></p> <p>What to Do: Direct people to correct page/chapter, AFGE History in Resource Guide: There is a famous and well known quote that says, “You cannot know where you are going until you know where you have been” AFGE has a long standing and rich history that every leader should know. Use page ____ to read and answer the questions in your PW on page ____Once the group resumes, ask a few questions to generate a discussion about the history a few may be:</p> <p>Was there anything that stood out to you? What is one interesting thing about AFGE history that you didn’t previously know? What are some accomplishments that AFGE experienced in history?</p> <p>Possible transition into next section: Along with these accomplishments, there have been challenges, needless to say that AFGE have had to overcome in order to move forward and to position this union where we are today. Everything about this union’s history has contributed to the policies, procedures, governance, structure etc that shape this union. These internal policies, procedures and the way we approach governance and the overall structure of AFGE is all shaped and outlined in our National Constitution.</p>	<p>Materials Needed:</p> <p>Participant Workbooks</p> <p>Resource Guide</p>

<p>“Without unions, workers will lose many of the protections against abusive employers. Wages for all will be depressed, even as corporate profits soar. The American Dream will be destroyed for millions. And we will have a government of the corporations, by the already powerful, for the wealthy.”</p>	<p style="text-align: center;">QUOTE ABOUT LABOR</p> <p><u>What to Do:</u></p> <p>Have someone read the quote out loud and start a very brief discussion on what it means.</p>	
 <p>The image shows a crowd of people at a protest or rally. In the foreground, several individuals are holding signs. One prominent sign reads "Stop Bush from destroying our jobs". Another sign partially visible says "Stop Bush from...". In the background, the United States Capitol building is visible under a clear sky. The text "AFGE National Constitution" is overlaid in large, bold, white letters on the left side of the image. A small AFGE logo is in the top left corner.</p>	<p style="text-align: center;"><u>AFGE CONSTITUTION</u></p> <p><u>Suggested Language:</u></p> <p>As a leader in AFGE knowing what is in the AFGE Constitution is imperative because it sets forth the rules by which the union conducts its business. Our Constitution is THE framework for how this union operates. It is important to know that the AFGE Constitution is a living document. Any changes or amendments to the constitution are made by democratically elected delegates at the National Convention. This convention occurs every 3 years and is the highest governing authority of the union.</p> <p>The convention has the power to adopt and promulgate laws and policies of AFGE, interpret and amend the constitution, as we have already stated, elect the national President, Secretary-Treasurer, and National Vice-President for Women's and Fair Practices, establish per-capita dues to the National, and act as a final court of review for members who feel they have not been treated fairly at lower levels of the union. Because the Constitution is so important, we will spend some time familiarizing ourselves with it in more detail. You all should have a copy of the Constitution.</p> <p><i>Other possible relevant points to make: AFGE National Constitution</i></p> <ul style="list-style-type: none"> • The AFGE National Constitution contains the rules and regulations adopted by the AFGE National Convention, which meets triennially. • The AFGE National Constitution is the supreme governing document of the Federation. If a provision of a Council or Local constitution conflicts with the AFGE National Constitution, the conflicting provision may not be enforced. • The AFGE National Constitution incorporates controlling laws, such as in Article XXIV, Section 8(c), regarding the bonding of all labor organizations required by law. The General Counsel's Office reviews the Constitution and any proposed amendments prior to each National Convention to determine whether any provision or amendment might conflict. In the event of any such conflict, the law must prevail. 	<p>Materials Needed: AFGE Constitution</p>

 <ul style="list-style-type: none"> • Membership • Structure and Governance • Duties of Officers • Discipline • Election of Officers 	<p style="text-align: center;">AFGE NATIONAL CONSTITUTION (GROUP WORK)</p> <p>Suggested Language: Even though this book is not terribly big, we certainly do not have the time to go through all of its content. If you have not done so already, as an AFGE Leader you should make it your business to read this cover to cover. Today as a group, we will review some of the key areas of the Constitution which include things like (read from the slide). In your PW, turn to page _____. There you should see the section AFGE National Constitution. We are going to mix it up a little so that you all can work with a different set of people. So gather your things, and we will count off in _____. All the 1s will gather at this table and so on....At your tables, in your groups, you will complete pages _____ using the AFGE Constitution, your own knowledge and the internet if needed. After you all have completed the hunt, your group will be assigned a topic to report out on, and we will ensure that everyone has the correct answers reflected in their workbooks.</p>	<p>Materials Needed: AFGE Constitution</p> <p>Participant Workbook</p> <p>**Plan to divide participants into small groups for this activity.</p>
<p style="text-align: center;">In the Constitution! Scavenger Hunt</p> 	<p style="text-align: center;">DIRECTIONS FOR SCAVENGER HUNT</p> <p>Suggested Language: At your tables, in your groups, you will complete pages _____ using the AFGE Constitution, your own knowledge and the internet if needed. After you all have completed the hunt, your group will be assigned a topic to report out on, and we will ensure that everyone has the correct answers reflected in their workbooks. Once you have completed this Scavenger Hunt, please let us know and we will give you the materials for the next part.</p>	
<p style="text-align: center;">In the Constitution! Scavenger Hunt Structure and Governance</p> 	<p style="text-align: center;">DEBRIEF/REPORT OUT FOR SCAVENGER HUNT</p> <p>Suggested Language: Alright, let's all come back together and start reporting out and reviewing some of this. We will review the answers to the Scavenger Hunt.</p> <p>So, with the "It's in the Constitution" questionnaire, you were all given the answers already, but are there any questions that you all have regarding the questionnaire? Let's start with any questions that you all have. (Proceed to answer questions, and allow people to provide input as well.)</p>	<p>Materials: AFGE Constitution</p> <p>AFGE Participant Workbook</p> <p>"It's in the Constitution Questionnaire" and Answer Sheet</p>
<p style="text-align: center;">AFGE ORGANIZATIONAL STRUCTURE</p> 	<p style="text-align: center;">AFGE STRUCTURE ACTIVITY DEBRIEF</p> <p>Suggested Language This is one of the recent depictions of AFGE's structure</p> <p>The National President (NP) is the principal officer of AFGE and the official spokesperson for the union. S/he has full responsibility for administering and implementing policies between the NEC meetings and the AFGE conventions. S/he is also responsible for presiding over the NEC; including planning and management</p>	<p>Materials: AFGE Constitution</p> <p>AFGE Participant Workbook</p>

	<p>of convention and NEC meeting logistics. The National President is an AFL-CIO Vice President and a member of the AFL-CIO Executive Board.</p> <p>The National Secretary-Treasurer is the national officer that 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 NEC and at the triennial National Convention; and submitting the required financial reports to the DOL and IRS. This officer also ensures that Districts, Councils, and Locals receive the information and forms they need to conduct District and Local elections and to elect delegates to the National Convention. What is the name of this person?</p> <p>The NVP for Women's and Fair Practices. This officer is responsible for advocacy and training on family and medical leave, childcare, sexual harassment, and the impact of domestic violence in 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; and AFGE's involvement in international affairs. What is the name of this person?</p> <p>In addition to the NVP, each District has two elected WFP officers; a Fair Practices Coordinator and a Women's Coordinator who are charged with assisting Local Women's and Fair Practice Coordinators in implementing District and national Human, Women's, 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.</p> <p>Locals, Councils and Districts: AFGE has more than 1100 chartered local unions in the US and its territories and Europe. Members elect the officers and delegates of their Local and send them as representative to the AFGE National Convention (refer participants back to the roof). All AFGE members must be members in good standing in their home Local in order to vote at the Convention.</p> <p>Each local has an Executive Board. The duties of the Executive Board members can be found in the AFGE Constitution and /or Local's Constitution and Bylaws.</p>	
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Suggested Language:

- National Convention. The AFGE Constitution sets forth the rules by which the union conducts its business. Any changes or amendments to the constitution are made by democratically elected delegates at the National Convention. This convention occurs every 3 years and is the highest governing authority of the union.
- The convention has the power to adopt and promulgate laws and policies of AFGE, interpret and amend the constitution, as we have already stated, elect the national President, Secretary-Treasurer, and National Vice-President for Women’s and Fair Practices, establish per-capita dues to the National, and act as a final court of review for members who feel they have not been treated fairly at lower levels of the union.
- On the 6nd floor you will find the National Executive Council (NEC). The NEC is the policy making and governing body of the union. The NEC monitors legislative matters directly affecting federal and DC government employees and initiates legislative actions as directed by the National Convention.
- Ask participants how many members make up the NEC?
- The NEC is comprised of 15 members, the National President, the National Secretary Treasurer, the National Vice President of Women’s and Fair Practices, and the twelve National Vice Presidents.

Materials:

AFGE Constitution
AFGE Participant Workbook



BREAKDOWN OF AFGE DISTRICTS

Suggested Language:

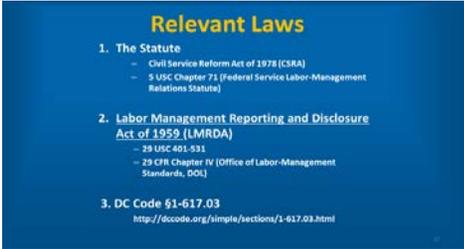
- Here are the 12 districts that comprise AFGE. This is how it is broken out geographically.
- Again, there are 12 National Vice Presidents who oversee these districts.
- The NVPs are charged with supervising and directing National Representatives (NRs) assigned to their District; assisting Locals in negotiating and implementing contracts; and 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. Delegates representing the Locals within each
- District elect a NVP 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 Women’s Advisory Committee member.

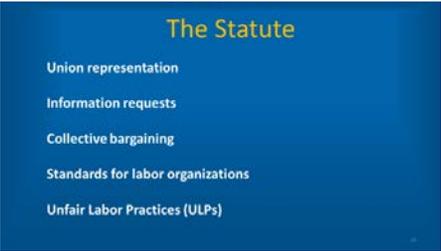
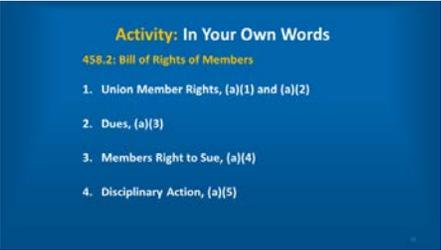
Materials:

AFGE Constitution

 <p>AFGE Councils</p> <ul style="list-style-type: none"> AFGE 000000 AFGE Federal Fire Fighter Steering Committee AFGE Federal Law Enforcement Council AFGE TSA Council 100 Air Force Materiel Command Locals (C-214) Council 252 Council of National Archives and Records Administration (NARA) Locals (C-260) DFAS Council of DFAC Locals (C-171) Defense Contract Management Agency (C-170) EPA Locals (C-234) ICE Council 118 Midwest Council of Food Inspection Locals (C-202) National Border Patrol Council National Council of EEOC Locals 216 National Council of Field Labor Locals (C-73) National Council of HUD Locals (C-222) National Council of Prisons Locals (C-33) National Council of SSA Field Operations Locals (Atlanta Region) (C-201) National Council of SSA Field Operations Locals (C-220) National Council of VA Locals (C-33) National Joint Council of Food Inspection Locals (C-45) 	<p style="text-align: center;">BREAKDOWN OF AFGE COUNCILS</p> <p>Suggested Language: The Constitution talks about Councils on Page 59: AFGE has more than 121 chartered councils who have been approved by the union's NEC. 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 their own officers at their own conventions attended by Locals in the councils; negotiate agency-wide contracts covering council locals; and lobby for their Locals' issues.</p>	<p>Materials: AFGE Constitution</p>
 <p style="text-align: center;">AFL-CIO</p> <ul style="list-style-type: none"> State Federations Central Labor Councils Area Labor Federations Affiliates Allied Groups Constituency Groups 	<p style="text-align: center;">AFL-CIO AFFILIATION</p> <p>Suggested Language: Lastly, an important and often over looked part of our structure is our overseer the AFL-CIO. The Constitution talks about the AFL-CIO and our affiliation with them on page 79. AFGE is a member of the AFL-CIO. The AFL-CIO is a national trade union federation, the largest federation of unions in the United States, made up of 56 national and international unions, together representing more than 12.5 million workers was the result of a merger in 1955 between the American Federation of Labor and the Congress of Industrial Organizations. It's headquarters is in Washington, DC. State AFL-CIO or State Federations: State federations tend to focus on state legislative lobbying, statewide economic policy, state elections, and other issues of a more over-arching nature. Local Bodies – Central Labor Councils (CLCs) and Area Labor Federations (ALFs): tend to focus on county or city lobbying, city or county elections, county or city zoning and other economic issues, and more local needs. Both state federations and local bodies work to mobilize members around organizing campaigns, collective bargaining campaigns, electoral politics, lobbying, strikes, picketing, boycotts, and similar needs. Affiliates: National unions and their locals can affiliate with their state federation or CLC. It is usually at the local level (through outreach from the CLC) that locals and their members mobilize around organizing campaigns, etc. Constituency Groups: Non-profit, nonpartisan organizations chartered and funded by the AFL-CIO to enhance the representational effectiveness of various under-represented groups. Usually they serve as a means to enhance the organizing of new members and as voter registrations and mobilization bodies. Examples of these groups include the A. Phillip Randolph Institute, Alliance for Retired Americans, Coalition of Black Trade Unionists,</p>	

	<p>Coalition of Labor union Women, Asian Pacific American Labor Alliance, Pride at Work, and Labor Council for Latin American Advancement.</p> <p>Allied Groups: Organizations that have more informal relationships to the AFL-CIO. They are truly independent organizations that wish to work closely with the AFL-CIO and promote its missions and goals. Such groups include JWW – Jobs with Justice, IWJ – Interfaith Worker Justice. Instructor Note: Remind participants that their dues are paid at the state level and that they should get involved with their State AFL-CIO if they are not. The CLCs or ALFs do require a minimal fee but they are encouraged to get involved at that level as well.</p>	
 <p>The image shows a presentation slide titled "LEGAL FRAMEWORK" for AFGE. On the left is the AFGE logo, which features a globe and the acronym "AFGE". Below the logo are four small photographs: a group of people in blue shirts, a person holding a sign, two women smiling, and a person in a white shirt with a rainbow flag. At the bottom of the slide, it reads "AMERICAN FEDERATION FOR GOVERNMENT EMPLOYEES, AFL-CIO".</p>	<p style="text-align: center;">LEGAL FRAMEWORK FOR AFGE</p> <p><u>Suggested Language:</u></p> <p>As a union that represents Federal and Local Government workers, there are a certain set of Federal laws that directly relate to how we operate and the work that we do. In this next section, we will talk through these laws to start to get a better understanding of those laws.</p>	

 <p>Relevant Laws</p> <ol style="list-style-type: none"> The Statute <ul style="list-style-type: none"> Civil Service Reform Act of 1978 (CSRA) 5 USC Chapter 71 (Federal Service Labor-Management Relations Statute) Labor Management Reporting and Disclosure Act of 1959 (LMRDA) <ul style="list-style-type: none"> 29 USC 401-431 29 CFR Chapter IV (Office of Labor-Management Standards, DOL) DC Code §1-617.03 http://dcode.org/simple/sections/1-617.03.html 	<p>Suggested Language:</p> <p>Here are the three most important laws that we as union leaders should be very familiar with. These three laws are definitely within the NEED TO KNOW category. I do want to point out that the last one, the DC Code specifically applies to those who are working in DC Locals only. So we will not spend time on that, just please familiarize yourself with the Code. It is searchable online, and we have included a website that will takeout directly to the Code here, as well as in your PW</p>	<p>Materials:</p> <p>Resource Guide</p> <p>AFGE Participant Workbook</p>
 <p>Enforcement/Accountability</p> <ul style="list-style-type: none"> Department of Labor (DOL), Office of Labor-Management Standards (OLMS) Federal Labor Relations Authority (FLRA) and for DC Government employees only <ul style="list-style-type: none"> Public Employee Relations Board (PERB) 	<p>Suggested Language: The agencies responsible for enforcing the LMRDA, CSRA, and DC Labor Relations Law are as follows: the U.S. Department of Labor, Office of Labor Management Standards (DOL, OLMS), Federal Labor Relations Authority (FLRA), and, for DC Government Employees only, the Public Employee Relations Board (PERB).</p> <p>We want to discuss, in more details, The Statue and The Standards of Conduct 29 C.F.R. §§ 457-459. The Bill of Rights of members or labor organizations, C.F.R §458.2,. These are two very important regulations for union officials.</p>	

	<p>Suggested Language: The Civil Service Reform Act of 1970 led to the creation of Title 5 U.S. Code Chapter 71. Agencies and Unions commonly refer to it as “the Statute” as it defines the legal framework for federal labor relations. Here is what you need to know about the Statute (read slide). If you have been a Steward, or been through our Steward class, then you know this stuff in detail. I encourage you all to attend a Representation class as, it goes into more detail about the Statute.</p>	<p>Materials: Resource Guide AFGE Participant Workbook</p>
	<p>Suggested Language: Overall the Standards of Conduct addresses these things (Read slide).</p>	<p>Materials: Resource Guide AFGE Participant Workbook</p>
	<p style="text-align: center;">REVIEWING THE LAWS (GROUPWORK)</p> <p>Suggested Language: OK– Now we will take some time to delve into a very important section of The Standard, The Bill of Rights of Members. Let’s break off into groups. You will be given a section to read through, discuss, and report out on the content.</p> <p>Report Out Main Points:</p> <p>(a)(1) Every member of a labor organization shall have the same rights, subject to reasonable rules, to:</p> <ul style="list-style-type: none"> Nominate Vote in elections/referenda Attend meetings and vote on business <p>(a)(2) Every member has a right to freedom of speech, but subject to reasonable rules, such as those that might pertain to the responsibility of members towards the organization, or interference with its legal or contractual duties. But be aware. Courts have found that union members have very broad rights to free speech.</p> <p>(a)(4) members have the right to sue when their rights are violated, but they usually have to go through any internal process first.</p> <p>(a)(5) 458.2 contains safeguards against improper disciplinary action. A member who is to be disciplined by the union must be 1) served with written specific charges, 2) given reasonable time to prepare his defense, and 3) afforded a full and fair hearing. What your bylaws say cannot override these requirements.</p> <p>(d) Finally under 458.2, you must make your contract available to members upon request.</p>	<p>Be prepared to break the participants into small groups for this activity.</p> <p>Materials: Resource Guide AFGE Participant Workbook</p>

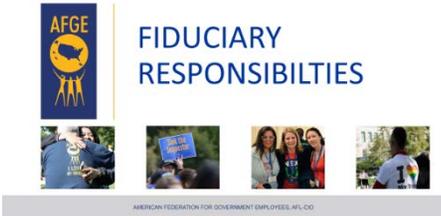
	<p>Just in case you were wondering, you cannot discipline members or otherwise coerce them to keep them from exercising these rights. (§458.37 458.38)</p>	
 <p>In the Constitution! Scavenger Hunt Article XXIII: Offenses, Trials, Penalties, Appeals</p> <ul style="list-style-type: none"> • Section 1: The Local is expected to handle its own discipline if it can • Section 2: List of offenses for which charges may be brought • Section 3: Investigating and preferring charges • Section 4: Local trial committee • Section 5: The accused has a right to representation • Section 6: If the accused fails to show up, the trial must go on without him/her • Section 7: For local trial committees, the trial committee presents its finding to the membership • Section 8: The decision goes into effect immediately pending appeal • Section 9: Appeals are made to NEC by the accused only 	<p>Suggested Language: Lets take a moment to pay special attention to an important area of the Constitution: Discipline. So, we could probably teach a separate class only on discipline and we don't have time here, we are just going to cover the highlights of the Article. So, information on Discipline in the Constitution is found on Page 62 in Article XXIII, entitled: Offenses, Trials, Penalties, Appeals. This is definitely a section we like to emphasize to make sure everyone has clarity.</p> <p>In section 1: The Local in which the member is part of is responsible for handling discipline. If the trial involves a Council Officer, then the Council is expected to handle the discipline.</p> <p>In section 2: This is a list of things that are considered offenses against the Federation. At the top of the list is encourages members/Local to leave. This is the highest offense and results in expulsion for life.</p> <p>In section 3: The National President, NVPs, the NEC, or Committee of Investigation (COI) can prefer charges." A local COI has 120 days to investigate charges.</p> <p>In section 4: A trial committee is made up of either all eligible members of an E-board or a committee elected by membership. The trial must occur within 180 days of preferring of charges.</p> <p>In section 5: The accused has a right to representation and the trial committee must produce a record of the proceeding.</p> <p>In section 6: If the accused fails to show up, the trial must go on without him/her. You can't just declare someone guilty on the spot.</p> <p>In section 7: For local trial committees, the trial committee presents its finding to the membership. WITHOUT DEBATE, the membership votes to either accept or reject those findings.</p> <p>In section 8: The decision goes into effect immediately, pending appeal.</p> <p>In section 9: Appeals are made to the NEC and must be received within 15 days of the receipt of the trial committee's decision. Only the accused may appeal</p>	
 <p>In the Constitution! Scavenger Hunt Appendix A: Rules of Conduct for an Election</p> <p>Key Players:</p> <ul style="list-style-type: none"> • Election Committee • Local Officer • Observer 	<p>Suggested Language: <u>The second subject is Conduct for Officer Elections. Okay, so first it is important to know the key players involved, which we will review now:</u> <u>First Point: Election Committee</u></p> <ul style="list-style-type: none"> •Nominations and elections of officers are governed by Appendix A of the AFGE National Constitution, which incorporates and satisfies the applicable legal requirements. For the purposes and goal of this class, I am going to give you an abbreviated version of the election process. 	

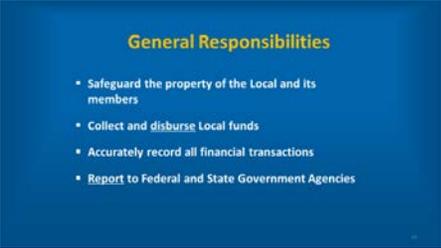
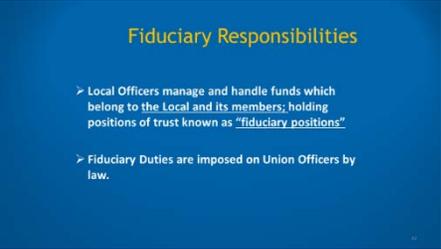
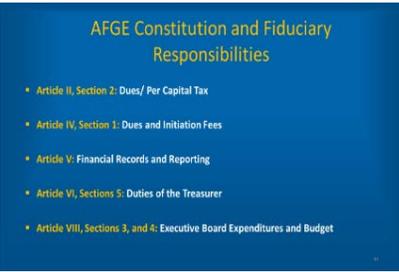
	<p>The AFGE Election Manual, which is available on the AFGE website, provides a more in depth look at elections.</p> <ul style="list-style-type: none"> •One of the first steps your local should take is to select an election committee. The manner of the selection should be specified in your local bylaws. The election committee should consist of at least three people, and if it's larger, the number of members on the committee should be odd. No member of the committee may be a candidate for, or incumbent of, a position in the election. •The committee has the complete authority to conduct all aspects of the nominations and election, including setting the dates and times and places of the nominations and election. The election committee should select a chair from amongst its members. Among the first things the election committee should do is rent a post-office box for handling its correspondence and ballots (mail or absentee) and familiarize themselves with the AFGE Election Manual. <p><u>Second Point: Local Officer's Role:</u></p> <ul style="list-style-type: none"> •The local's officers, particularly the President and Treasurer, have a constitutional responsibility to cooperate with the committee, and cannot interfere with or usurp the decisions of the committee. The local's officers should help the election committee to update the local's membership list and the members' addresses. This is possibly the single most important action to ensure a smooth election. •The election committee should draft campaign and election rules. The most important rules to remember regarding campaigning are the following: •Every candidate has a right to campaign, so long as he or she does so without the use of employer (including employers other than the agency) or union (including any union, AFGE or other) funds or resources; •The election committee must comply with all reasonable and timely requests of the candidates to distribute campaign literature to members, at the candidate's expense, and to provide the same opportunity to all candidates; and <p><u>Third Point: Observer:</u></p> <ul style="list-style-type: none"> •Each candidate is entitled to have an observer, who is a member of the local, present at all stages of the election, such as when the ballots are picked up from the P.O box or counted. 	
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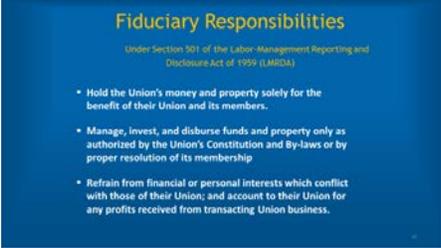
<p style="text-align: center;">In the Constitution! Scavenger Hunt Appendix A: Rules of Conduct for an Election</p> <p>Nomination Notice</p> <ul style="list-style-type: none"> • Must be issued at least 10 days in advance <ul style="list-style-type: none"> ○ What is required on the nomination notice? • Eligibility requirements for holding an Office <ul style="list-style-type: none"> ○ What are the requirements? 	<p>Suggested Language: Another key point to point out is the process of nominations:</p> <ul style="list-style-type: none"> • The local must give at least ten days written notice prior to the nomination meeting or deadline for submission of nominations by mail. The notice must inform the members of the following information: <ul style="list-style-type: none"> • 1) which officers are to be elected; • 2) the term of office of the officers; • 3) the date, time, and place of any nomination meeting, or the deadline for mailed nominations and the method of making and accepting nominations; and • 4) the eligibility requirements for holding office: <ul style="list-style-type: none"> • a) being in good standing (current in dues); • b) being a member of an AFGE local for at least one year (this does not apply to newly-formed locals); • c) not being a member of any labor organization not affiliated with the AFL-CIO. • Remember: The nomination notice must be issued (posted, emailed or mailed) at least 10 days in advance, so as to provide members with a reasonable opportunity to nominate candidates. If your local covers more than one worksite, you may need to mail your notice, particularly to retirees. 	
<p style="text-align: center;">In the Constitution! Scavenger Hunt Appendix A: Rules of Conduct for an Election</p> <p>Elections</p> <ul style="list-style-type: none"> • All elections must be conducted by secret ballot • Local must mail notice at least 15 days before the election <p>Ballots</p> <ul style="list-style-type: none"> • Should be counted when polls close or the deadline is reached • Write in votes are prohibited <p>Results</p> <ul style="list-style-type: none"> • By majority • Results should be sealed 	<p>Suggested Language: So what about the actual election?</p> <p>All elections, mail or manual ballot, must be conducted by secret ballot. The local must mail notice of the election to each member at his or her last known address at least fifteen days before the election. If your local is conducting a manual ballot, the local may choose to conduct nominations and the election in one meeting. In this case, the local may mail out a combined nomination and election meeting, but the notice must satisfy the requirements of both nomination and election notices. The election notice must specify the offices to be filled, time, date, place, manner of election, and any provision for absentee ballots. The notice should also provide provisions for a run-off ballot. If the local is conducting its election by mail, the notice may include the actual ballot that will be used for voting. The voting instructions should call for the return of the ballot at a date a minimum of fifteen days later. Included with the ballot should be an envelope addressed back to the election committee and an otherwise blank envelope labeled "Secret Ballot."</p> <p>BALLOTS</p> <ul style="list-style-type: none"> • In either type of election, when either the polls have closed or the deadline for returning ballots has passed, the election committee must count the ballots. The election committee should count each vote where the voter's 	

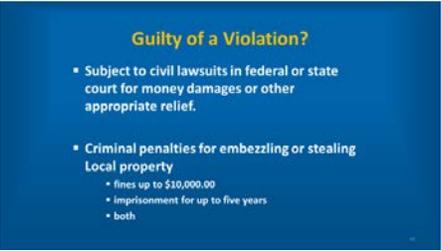
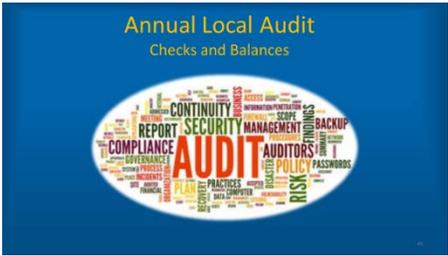
	<p>intent is clear and the ballot remains secret. Write-in votes are prohibited under the AFGE National Constitution.</p> <ul style="list-style-type: none"> •Officers must be elected by majority vote. If no one gets the majority of votes cast for an office on the first ballot, the election committee will need to hold a run-off election. When the election is complete, the election committee should gather the records and seal them. •Protests and appeals are governed by Appendix A, Part III of the AFGE National Constitution. Elected officers assume offices after installation notwithstanding pending protests and they retain those offices until the term expires or until new officers are elected as a result of an ordered rerun election or of a decision on a complaint/appeal by the election committee, National Vice President, or the National President. •The time limits for filing protests are set forth in Appendix A, Part III, and must be strictly followed by the protestor and the election committee. <p>RESULTS:</p> <ul style="list-style-type: none"> •By majority •Results should be sealed •Protests and appeals are governed by Appendix A, Part III 	
	<p>Suggested Language: Under law and DoL regulations (§458.26), AFGE may place affiliates in trusteeship for such purposes as (a) correcting corruption or financial malpractice, (b) assuring the performance of negotiated agreements or other duties of a representative of employees, (c) restoring democratic procedures, or (d) otherwise carrying out the legitimate objects of such labor organization. The two most common reasons for trusteeship are that the officers fight so much amongst themselves that the local can't function and the failure to pay per capita tax.</p>	<p>Materials: AFGE Constitution Resource Guide</p>
	<p>Suggested Language: When it imposes trusteeship on a local, AFGE removes the current officers, but must allow the local to elect delegates to national elections. Also, AFGE cannot impose trusteeship to seize assets from locals, except for what the local may owe in per capita or other assessments (§ 458.27). DoL will consider a trusteeship valid for 18 months if AFGE follows its Constitution and there was a fair hearing (§ 458.28)</p>	<p>Materials: AFGE Constitution Resource Guide</p>
	<p>Suggested Language: DOL regulations also impose a number of fiduciary obligations (§§458.31, 458.32, 458.33, 458.34, 458.35) upon local union officers, which we will be covering in greater detail in that section. The overarching principle to take home is that the local's money belongs to the members and should be spent for their benefit as a union.</p>	

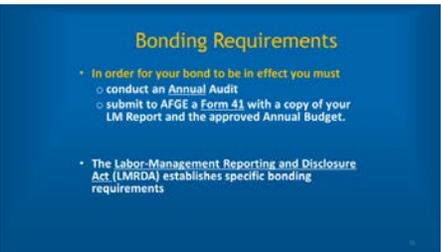
	<p>When you get a chance, read 29 U.S.C. § 501(a). This statute means, among other things, that you should have no conflicts of interest with the local, such as business dealings, nor should your family. While legally the local can lend money to members or officers, it shouldn't. If it does, any loans should not exceed \$2,000 and must be treated like a loan, meaning that it should be pursuant to an agreement that sets up regular payments and interest.</p> <p>Department of Labor regulations (§458.3 and § 403) require that your local file LM reports, which we will discuss more during the section on Fiduciary Responsibilities. One small point to remember is that you are required to file your constitution and bylaws with it. As a result, your bylaws are a matter of public record.</p> <p>On a related note, people convicted of certain crimes may not hold union office for thirteen years after conviction or the end of his or her imprisonment, whichever is more recent. The statute (29 U.S.C. § 504) lists a number of offenses, including bribery, extortion, murder, rape, and violation of narcotics law, but some of the offenses are not as clear. It can get confusing with regard to whether an offense is covered or when the thirteen years begins to run, so if you have any questions about this, you should contact the General Counsel's Office.</p>	
	<p style="text-align: center;">HARD CASE ACTIVITY</p> <p>Suggested Language: Alright, so let's put our knowledge and experience to the test. We will look at some scenarios together, and think about the best resolves, the response....</p>	<p>Materials: AFGE Constitution Resource Guide Participant WB</p>
 <p>Chuck attends all local membership meetings, but he is loud and critical of the leadership at virtually every meeting.</p> <p>Because of his antics and verbal abuse of officers and other members, attendance of other members has declined, and it is difficult to conduct business at the meetings.</p> <p>The Executive Board is meeting to consider what to do about Chuck. What options does it have? Can it bar him from meetings, order him to leave if he criticizes, file disciplinary charges against him, or suspend him from membership?</p>	<p>Have participants read the scenario off the slide, and answer the question as a large group.</p> <p>LMRDA §101(a)(2); 29 CFR §458.2(a), §458.37; libel cases; call security.</p>	<p>Materials: AFGE Constitution Resource Guide Participant WB</p>

 <p>Judy wants to join your Local.</p> <p>Unfortunately, in the past she has loudly criticized AFGE and has urged other employees to seek another union.</p> <p>Now she brags that she will get into the Local in order to “destroy it from the inside.” She has signed and submitted a SF-1187, dues allotment form, to become a member.</p> <p>What can your Local do?</p>	<p>5 U.S.C. §7116(c); FLRA ALJ 4-CO-10021 (1992); charges and trial under Article XXIII</p>	<p>Materials: AFGE Constitution Resource Guide Participant WB</p>
 <p>Your Local Vice President has just come to you, Local 3333's President, and confessed that he was convicted of a felony—obstruction of justice—seven years ago, but never served time in jail because he was sentenced to two years on parole, which ended five years ago.</p> <p>Is this a problem? If so, what should you do?</p>	<p>29 C.F.R. §458.36; various state criminal statutes</p>	<p>Materials: AFGE Constitution Resource Guide Participant WB</p>
	<p>FIDUCIARY RESPONSIBILITIES SECTION</p> <p><u>Suggested Language:</u> As a union that represents Federal and Local Government workers, there are a certain set of Federal laws that directly relate to how we operate and the work that we do. In this next section, we will talk through these laws to start to get a better understanding of those laws. Now we are going to talk about some of your fiduciary responsibilities. I do want to clarify that while you are getting a portion of the material from the Financial Officer's training, what will be presented to you today is not, I repeat, is not a substitute for the Financial Officer's training.</p> <p>Let's start by identifying who the Financial Officers are: Ask the participants to identify who they believe the Financial Officers are before you show the slide.</p>	
	<p><u>Suggested Language:</u> So who is has responsibility over finances? These people! Yes, all of these individuals in some capacity is responsible for the Local's finances. So essentially all Officers should know the ins and outs of Fiduciary responsibilities. I repeat, Every Local president and officer stands in a fiduciary position with respect to the union and its members</p>	

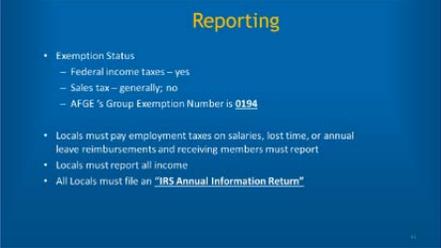
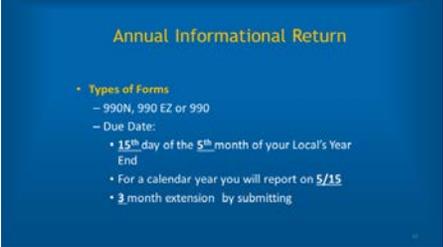
 <p>General Responsibilities</p> <ul style="list-style-type: none"> • Safeguard the property of the Local and its members • Collect and disburse Local funds • Accurately record all financial transactions • Report to Federal and State Government Agencies 	<p>Suggested Language: Overall, as a Financial Officer, you are entrusted by the membership to faithfully perform vital duties such as: safeguarding the property of the Local and its Members, collecting and disbursing Local funds, accurately recording all financial transactions, and reporting to Federal and State Government Agencies</p>	
 <p>Fiduciary Responsibilities</p> <ul style="list-style-type: none"> ➢ Local Officers manage and handle funds which belong to the Local and its members; holding positions of trust known as "fiduciary positions" ➢ Fiduciary Duties are imposed on Union Officers by law. 	<p>Suggested Language: You manage and handle funds that belong to the Local and its members. Ask the participants who the money belongs to? That is correct, the Local and its members. It is not your money, but in your fiduciary position, you have a great responsibility to handle the Local and members' money with care.</p>	
 <p>Where is this Information?</p> <ul style="list-style-type: none"> • AFGE Constitution • Labor Management Reporting and Disclosure Act • Civil Service Reform Act • Local Bylaws • Union and Local Operating Practices 	<p>Suggested Language: There are several places where fiduciary responsibilities are outlined, and as an AFGE leader, you should know all of them, and what they say. As we have been saying throughout the training, we do not have the time to go through every single thing, but we will spend time reviewing some of the highlights. So this is where you can find information on Fiduciary responsibilities (<i>click the slide to show the list</i>). So let's start reviewing some of the highlights. Starting with what is outlined in the Constitution....</p>	
 <p>AFGE Constitution and Fiduciary Responsibilities</p> <ul style="list-style-type: none"> • Article II, Section 2: Dues/ Per Capital Tax • Article IV, Section 1: Dues and Initiation Fees • Article V: Financial Records and Reporting • Article VI, Sections 5: Duties of the Treasurer • Article VIII, Sections 3, and 4: Executive Board Expenditures and Budget 	<p>Suggested Language: Fiduciary responsibilities are also outlined in section 501 of the LMRDA! These duties, imposed on Union officers by law are set forth in Section 501 of the Labor-Management Reporting and Disclosure Act of 1959. Those duties include holding the Union's money and property solely for the benefit of their Union and its members; managing, investing, and disbursing funds and property only as authorized by the Union's Constitution and Bylaws or by proper resolution of its membership; refraining from financial or personal interests which conflict with those of their Union; and accounting to their Union for any profits received from transacting Union business.</p>	<p>Materials: AFGE Constitution</p>

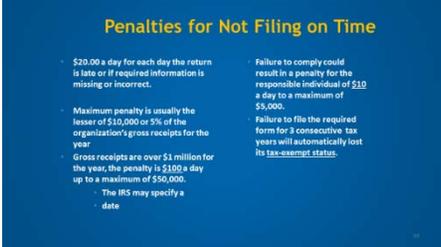
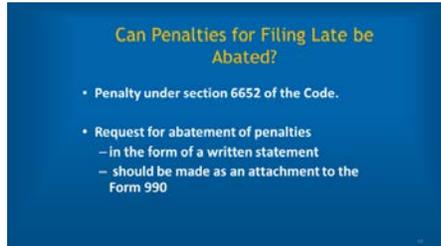
	<p>Suggested Language: Before we get off the topic of managing the Local's money properly, let address a topic of interest: CREDIT CARDS A local cannot effectively conduct financial business without the use of a credit card, but there are some inherent problems with credit card usage. To avoid such problems, credit cards should be in the name of the individual local officer; monthly dollar amount limits should be placed on credit cards; no ATM or debit capability should be allowed; credit cards should be used for Local business only (no personal charges by an officer); a credit card statement should not be considered authorization for payment (you must provide receipts, hotel statements, vouchers, etc.); and use of a credit card should be defined in the Local's Bylaws</p>	
	<p>Suggested Language: Ok– secondly in regards to properly managing the Local's funds, let's talk LOANS! JUST SAY NO! AFGE does not recommend making loans to members because recover of defaulted loans are costly and difficult. However, if a local decides to make a loan, you should follow the guidelines written. They must be approved by the membership; The executive board cannot approve loans; and a loan cannot be more than \$2,000 per individual.</p> <p>For any loan, there should be some very clear standard criteria that the Local has adopted. Remember what the Local does for one member, you must do for all members and all outstanding advances in excess of \$2,000 are considered a loan by the DOL. Remember, what the Local does for one member, you must do for all members.</p>	
	<p>Suggested Language: Fiduciary responsibilities are federally regulated! So there are real and intense fines and penalties if they are violated. Consequences could include an officer being personally responsible for losses.... Union officials who violate these federally created fiduciary duties are subject to civil lawsuits in federal or state court for money damages or other appropriate relief. In addition, there are criminal penalties for embezzling or stealing Local property – fines up to \$10,000.00, imprisonment for up to five years, or both.</p>	

	<p>Suggested Language: As with any organizations there is a system for checks and balances in regards to finances at AFGE, and that comes in the form of an annual local audit. Each Local is required to conduct an audit at least once a year and make a certification using audit Certification Form 41 to the National Secretary-Treasurer showing that an audit has been completed. It is mandatory that you conduct an audit at the close of each year end, when there is a chance in financial officers, or when there is a suspicion of any wrong doing. Because this is actually so important to the fiduciary process, let's review more details about audits.</p>	
	<p>Suggested Language: As with any organizations there is a system for checks and balances in regards to finances at AFGE, and that comes in the form of an annual local audit. Each Local is required to conduct an audit at least once a year and make a certification using audit Certification Form 41 to the National Secretary-Treasurer showing that an audit has been completed. It is mandatory that you conduct an audit at the close of each year end, when there is a chance in financial officers, or when there is a suspicion of any wrong doing. Because this is actually so important to the fiduciary process, let's review more details about audits.</p>	
	<p>Suggested Language: If you haven't done so already, you should make sure that you identify an audit committee or someone to conduct the audit. If you are having an annual internal audit, the President should appoint an odd number of members (3-5) that do not have signature authority on any accounts to this committee. You may hire outside accountants or bookkeepers to perform an annual external audit if you so choose. AFGE suggests that the Financial Officers conduct an audit of the Savings, Checking, Investment, and Credit Card account statements on a monthly basis to insure that all items have been reconciled. A review of the checkbook and dues deduction listings is also recommended.</p>	
	<p>Suggested Language: Here is a list of records needed to perform an audit. There are several records that are needed to perform an audit. The list of records include the following: checkbook; savings, checking, and investment account statements, cancelled checks, deposit slips, and credit card statements; dues deduction listings; local Constitution and Bylaws; minutes of local meetings, minutes of E-Board meetings, LM-2, LM-3, or LM-4 reports for the past two years; IRS 990-EZ or 990 for the past two years, annual budgets, prior audit committee reports; Form W4's for the past two years (payroll); current financial roster; inventory of all fixed</p>	<p>If time permits, may want to visit the website using the LCD/Projector screen to give people an idea of how much of what they need is there, and where to find it.</p>

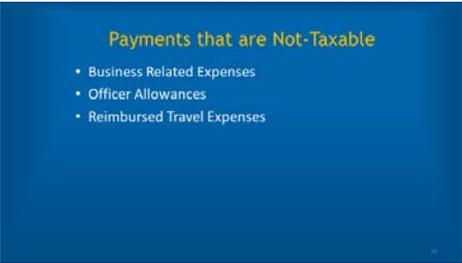
	assets (i.e. computer, office furniture, copy machine, etc.); and payroll tax returns, forms 940, 941, W-2s and 1099s.	
 <p>Records Needed to Perform Audit</p> <ul style="list-style-type: none"> • Checkbook • Savings, checking, and investments account statements, cancelled checks, deposit slips, and credit card statements • Dues deduction filings • Local constitution and by laws • Minutes of local meetings • LM-2, LM-3, or LM-4 reports for the past 2 years • IRS 990 EZ or 990 for past two (2) years • Annual budget • Prior audit committee reports • Form 991's for the past two years - payroll • Current financial roster • Inventory of all fixed assets (i.e. computer or office furniture) • Payroll tax returns, forms 940, 941, W-2's and 1099's 	<p>Suggested Language: and here is a list of red flag items during an audit. When having an audit performed, there are some red flags that you should pay attention to. Those red flags are: 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; and unbalanced checkbooks with no deposit records.</p>	
 <p>Red Flag Items During an Audit</p> <ul style="list-style-type: none"> • 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 	<p>Suggested Language: Bonding is required to protect Unions from financial losses it is an Insurance policy that insures an organization against financial loss IT IS Referred to as a security or fidelity bond Required All AFGE Locals are covered under a blanket bond and charged annually for the coverage</p>	
 <p>Bonding</p>	<p>Suggested Language:</p>	
 <p>Bonding Requirements</p> <ul style="list-style-type: none"> • In order for your bond to be in effect you must <ul style="list-style-type: none"> ◦ conduct an Annual Audit ◦ submit to AFGE a Form 41 with a copy of your LM Report and the approved Annual Budget. • The Labor-Management Reporting and Disclosure Act (LMRDA) establishes specific bonding requirements 	<p>Suggested Language: The Labor-Management Reporting and Disclosure Act (LMRDA) establishes specific bonding requirements to protect Unions from financial losses caused by "fraudulent or dishonest acts" by Union Officers or employees. All AFGE Locals are covered under a blanket bond and charged annually for the coverage. In order for your bond to be in effect, you must conduct an annual audit and submit to AFGE a Form 41 with a copy of your LM report and the approved annual budget. The Labor-Management Reporting and Disclosure Act (LMRDA) established specific bonding requirements.</p>	

<p style="text-align: center;">LMRDA Bonding Requirements</p> <ul style="list-style-type: none"> ➤ Required coverage <ul style="list-style-type: none"> ➤ CA + TR x 10% = amount of coverage required ➤ CA is current assets (cash, investments) ➤ TR is total receipts ➤ 10% is the amount of coverage required ➤ AFGE's recommendation <ul style="list-style-type: none"> ➤ CA + TR x 100% 	<p>Activity - Fiduciary Responsibilities (True or False):</p> <p>A bond, like any insurance policy has a maximum recovery amount. Per the Department of Labor, the bond must be equal to at least 10 percent of the Local's assets. A quick formula for computing required coverage is current assets (cash, investments) plus total receipts multiplied by 10%. That is the least amount of coverage you should have. AFGE is strongly recommended that your coverage be 100% of your total assets</p>	
<p style="text-align: center;">TRUE or FALSE</p> <ol style="list-style-type: none"> 1. A member of the NEC or any duly authorized representative must give you a 72 hour notice if they desire to look at your records. 2. It is mandatory for the Local to conduct an audit when there is a change in Financial Officers? 	<p>Ask the participants to stand up. Let them know that you are going to read them five statements. They should move to the right of the room if the statement is true and to the left of the room if the statement is false</p> <ol style="list-style-type: none"> 1. A member of the NEC or any duly authorized representative must give you a 72 hour notice if they desire to look at your records. False – all books, records, and financial accounts shall be open to the inspection of the National Executive Council or 2. It is mandatory for the Local to conduct an audit when there is a change in Financial Officers? True – Ask participants what other two times must an audit be conducted – at the close of each year end or when there is a suspicion of any wrongdoing 	
<p style="text-align: center;">True or False</p> <ol style="list-style-type: none"> 3. There are criminal penalties for embezzling or stealing Local property that can include fines up to \$10,000, imprisonment for up to five years, or both. 4. In order for your bond to be in effect, you must conduct an annual audit and submit two documents to AFGE; a Form 41 and a copy of LM report. 5. Pre-signed checks by one officer is a red flag item during an audit. 	<ol style="list-style-type: none"> 3. There are criminal penalties for embezzling or stealing Local property that can include fines up to \$10,000, imprisonment for up to five years, or both. True 4. In order for your bond to be in effect, you must conduct an annual audit and submit two documents to AFGE; a Form 41 and a copy of LM report. False – you should submit 3 documents, a Form 41, a copy of your LM report, and the approved annual budget. 5. Pre-signed checks by one officer is a red flag item during an audit. True 	
<p style="text-align: center;">Fiduciary Reporting</p> 	<p>Suggested Language:</p> <p>This image depicts how people usually feel and deal with reporting finances. BUT it does not have to be this way....It is important to gather all the information you can, so that you can be well-informed.</p> <p>First off, know who you will be reporting to. Who do report to? (Read list)</p>	

	<p>Just read the slide.</p>	
	<p>Suggested Language: AFGE Locals are exempt from federal income taxes by the IRS by being a 501C (5) organization and the Group Exemption Number is 0194. Generally, AFGE Locals are not exempt from Sales Taxes. Locals must pay employment taxes on salaries, lost time, or annual leave reimbursements paid to their officers or members. The members receiving these types of payments must report the income and pay taxes. Locals must report all income to the Internal Revenue Service whether it is taxable or not. The exemption from tax does not extend to all types of Local income. Certain types of income are taxable and must be reported to the IRS on form 990T</p>	
	<p>Suggested Language: What forms will you be using? These forms, 990N, 990-EZ, and 990 should be filed by the local by the 15th day of the 5th month after their fiscal year end. For a calendar year, the report should be filed on May 15. A Local can get an extension of 3 months by submitting an IRS “Extension to File Form” 8868.</p> <p>If your gross receipts are less than \$\$50,000 the local will need to file a 990-N (E-Postcard); If your gross receipts are less than \$200,000 and total assets are less than \$500,000 the local should file the 990-EZ; and If your gross receipts are greater than \$200,000 or total assets are greater than \$500,000 the local should file a full 990. <u>You can get the forms from the IRS website. When on the website, enter the Form you are looking for in the “Search Box” at the top of the screen. For example, 990 or 990-EZ. You may also go to the AFGE website under NST financial Officers Resources and get the forms.</u></p>	

 <p>Penalties for Not Filing on Time</p> <ul style="list-style-type: none"> \$20.00 a day for each day the return is late or if required information is missing or incorrect. Maximum penalty is usually the lesser of \$10,000 or 5% of the organization's gross receipts for the year. Gross receipts are over \$1 million for the year, the penalty is \$100 a day up to a maximum of \$50,000. <ul style="list-style-type: none"> The IRS may specify a date. Failure to comply could result in a penalty for the responsible individual of \$10 a day to a maximum of \$5,000. Failure to file the required form for 3 consecutive tax years will automatically test its tax-exempt status. 	<p><u>Suggested Language:</u> IT IS IMPERATIVE THAT YOU FILE ON TIME! if an organization fails to file a required return by the due date, including any extensions of time, it must pay a penalty of \$20 a day for each day the return is late. The same penalty applies if the organization does not give all the information required on the return or does not give the correct information. In general, the maximum penalty for any return is the lesser of \$10,000 or 5 percent of the organization's gross receipts for the year. For an organization that has gross receipts of over \$1 million for the year, the penalty is \$100 a day up to a maximum of \$50,000. If the organization is subject to this penalty, the IRS may specify a date by which the return of correction information must be filed. If the return is not filed by that date, an individual within the organization who fails to comply may be charged a penalty of \$10 a day. The maximum penalty on all individuals shall not exceed \$5,000.</p>	
 <p>Can Penalties for Filing Late be Abated?</p> <ul style="list-style-type: none"> Penalty under section 6652 of the Code. Request for abatement of penalties <ul style="list-style-type: none"> in the form of a written statement should be made as an attachment to the Form 990 	<p><u>Suggested Language</u></p> <p>Failure to timely file the information return, absent reasonable cause, can give rise to a penalty under section 6652 of the Code. Whether an organization qualifies for the reasonable cause exception to the penalty will be determined on a case-by-case basis taking into account all relevant facts and circumstances. The regulations provide that a request for abatement of penalties based on reasonable cause must be made in the form of a written statement, containing a declaration by the appropriate person that the statement is made under penalties of perjury, setting forth all the facts alleged as reasonable cause. This statement should be made as an attachment to the Form 990 The statement should include the following: The reason the penalty was charged. The daily delinquency penalty may be charged for a late file return, an incomplete return, or both. What prevented the organization from requesting an extension of time to file its return or if the organization did not request such an extension How the organization was not neglectful or careless but exercised ordinary business care and prudence and what steps have been taken to prevent the same situation from occurring in the future</p>	

<p>Is your Local an Employer?</p> <ul style="list-style-type: none"> Do you pay Officers, Stewards, Staff or others to perform duties or services for the Local: <ul style="list-style-type: none"> Salaries Payment for Lost Time (LWOP) Annual Leave Reimbursements Stipends All employers must pay payroll taxes. <p>IRS's Description of an Employee <i>(only one needs to exist)</i></p> <ul style="list-style-type: none"> Member's compensation is measured by the hour, week or month rather than by the job Performs the services personally, without the ability to delegate the task to somebody else Continuing working relationship between the member and the Local Local supplies materials or facilities used by the member in performing the services (i.e. office, office supplies, telephone, etc) Local provides instructions or training to the member; and the member performs the service in question solely for the Local (and not for others) 	<p>Suggested Language Remember the Local is an Employer when it makes payments to Officers, Stewards, Staff or others to perform duties or services for the Local, such as those listed on the slide (salaries, payment for Lost Time – LWOP, annual leave reimbursements or stipends). If you are an employer, you must pay payroll taxes.</p> <p>Have participants read slide out loud</p>	
<ul style="list-style-type: none"> Annual Financial Report If your Local has gross receipts of: <ul style="list-style-type: none"> More than \$250,000, you must file an LM-2 Report Less than \$250,000 and more than \$10,000 you must file an LM-3 Report Less than \$10,000, you must file an LM-4 Report DC Government Locals are not required to file a LM Report with DOL 	<p>The LMRDA requires Locals to file an “Annual Financial Report” with the U. S. Department of Labor. The type of report that you file depends on your gross receipts. The LMRDA requires Locals to file an “Annual financial Report” with the US Department of Labor. If your Local has gross receipts of:</p> <ul style="list-style-type: none"> More than \$250,000, you must file an LM-2 report; Less than \$250,000 and more than \$10,000 you must file an LM-3 report; and Less than \$10,000, you must file an LM-4 report DC Government Locals are not required to file a LM report with DOL. 	
<p>When are the Labor Department Reports Due?</p> <ul style="list-style-type: none"> 90 days after the Local's Year End <ul style="list-style-type: none"> If you are on a Calendar Year this is 3/31 If you are on a Fiscal Year, it is 90 days from the close of your Year End 	<p>Suggested Language: The LM Forms are due 90 days after the Local's Year End. The best place to go to get the Labor Department forms is the Labor Department website.</p>	
<p>Reporting to your Local Membership</p> <ul style="list-style-type: none"> Keep the Membership informed of: <ul style="list-style-type: none"> All Income received by the Local All Expenditures and Payments All Assets and Accounts The creating and reporting of Budget items 	<p>Suggested Language: Now let's talk about what AFGE requires of you to report. The Financial Officers have a responsibility to keep the membership informed of all income received by the Local (Dues and other income), all expenditures and payments made on behalf of the Local, all assets and accounts held on behalf of the Local, and the creating and reporting of Budget items allocated by the Local.</p>	

 <p>Retention of Documents and Other Important Items</p> <p>General Local Files:</p> <ul style="list-style-type: none"> • By-laws and Amendment----- Permanent • Correspondence ----- 5 Years • Election Records ----- 2 Years past the term of office • Local MOUs ----- Permanent • Minutes of Meetings ----- Permanent (Membership & E-Board) • Items that Document the Local's History ----- Permanent 	<p>Suggested Language: We know we have some leaders who don't like to get rid of anything and some leaders who like to get rid of everything. However, there are some documents that you need to keep indefinitely and some for a period of time. Of your general local files, you should keep the:</p> <p>By-laws and amendments -permanently Correspondences -5 years Election records – 2 years after the term has expired Local Memoranda of Understanding – permanently Minutes of Meetings (membership and e-board) – permanently Items that document the local's history – permanently</p>	
 <p>Retention of Documents and Other Important Items</p> <p>Local Membership Records:</p> <ul style="list-style-type: none"> • Dues Deduction Forms (1187, 1188, etc.) ----- 3 years • EEO Case Files ----- 5 years • Grievance Case Files ----- 5 years • MSPB Case Files ----- 5 years • Workers' Compensation Case Files ----- 5 years 	<p>Suggested Language: When it comes to your Local membership records, you should keep</p> <p>Dues deduction forms (1187, 1188, etc) – 3 years EEO case files – 5 years Grievance case files – 5 years MSPB case files-5 years Worker's compensation case files – 5 years</p>	
 <p>Retention of Documents and Other Important Items</p> <p>Financial Records</p> <ul style="list-style-type: none"> • Correspondences ----- 5 years • IRS Forms ----- 5 years • LM Forms ----- 5 years • Financial Statements and Reports ----- Permanent • Officer Bonds ----- Permanent 	<p>Suggested Language: and regarding your financial records, you should keep</p> <p>Correspondences – 5 years IRS forms – 5 years LM forms-5 years Financial statements and reports – permanently Officer bonds – permanently Many of these retentions are mandated by the Department of Labor and IRS.</p>	
 <p>Payments that are Not-Taxable</p> <ul style="list-style-type: none"> • Business Related Expenses • Officer Allowances • Reimbursed Travel Expenses 	<p>Give participants an opportunity to read the slide.</p> <p>Suggested Language:</p> <p>As a financial officer, you should be aware of the payments that are not-taxable. For business expenses, the payment is not-taxable when the expense is for Union business, when detailed vouchers are provided showing time, place, and business purpose; when documentation is submitted in a timely manner; and when any unused funds are returned to the organization. All four factors must be met or payment is taxable</p> <p>Detail vouchers are provided showing: time, place, and business purpose Documentation is submitted in a timely manner Any unused funds are returned to the organization</p> <p>OFFICER ALLOWANCES: When:</p>	

	<p>Expense is for union business Expense vouchers are provided Documentation is submitted in a timely manner Any unused funds are returned to the organization REIMBURSED TRAVEL EXPENSES: When: Expense is for union business Expense vouchers are provided showing time, place, and business purpose Documentation is submitted in a timely manner Any unused funds are returned to the organization</p>	
	<p>Suggested Language: When non-payroll payments are made and exceed \$600 annually for an individual or vendor, then you are responsible for completing a 1099. When non-payroll payments are made and exceed \$600 annually for an individual or vendor, then you are responsible for completing a 1099. Types of payments that require a 1099 include membership recruitment payments made to a member or an officer, payments made for services performed by arbitrators, accountants, legal services, consultants, etc., and items or equipment purchased for the officers or members (i.e. personal cell phones, laptops, etc.).</p> <ul style="list-style-type: none"> • 1099s must be given to the individual or vendor by January 31st. Copies of all 1099s must be filed with the IRS by February 28th along with an Annual Summary (Form 1096). • Give participants an opportunity to read the slide. 	
	<p>Suggested Language: There is support available. A suggested approach for AFGE Locals and Councils is the AFGE Customized Accounting System through the use of Quick Books Pro. If you take the Financial Officer's training, you will be able to experience using this program. You can also take the training online by going to AFGE's website and clicking on Financial Officer's training under the Education tab. You must be logged in to access the online training: District trainings Bonnie Ladin Union Skills AFL-CIO Online at www.afge.org</p>	

		
	<p>Suggested Language:</p> <p>Alright– time to get into some skills. The first part of this training was heavily knowledge based. We provided you with a lot of information, and that was just the surface. Again, we cannot stress enough to take time out to read more through the laws, even the Resource Guide to get a fuller understanding of everything we covered.</p> <p>Well the same thing goes for skills. We do not have the time needed to review all the skills needed to be successful in your work. But --as has been the theme for the entire training, we will highlight some skills.</p> <p>Let's start by listing out the skills important for Officers to have to be successful in their work. Though we will not cover it all, having this list will help everyone in the room understand from collective experience what is important to develop as a leader within AFGE.</p>	
	<p>Ask participants this question. Can use flipchart and markers to record responses.</p> <p>As we think about what it takes to be an effective leader, we know that effective leadership is also what makes us BIG ENOUGH TO WIN. Having strong leadership, builds a stronger union bc this union is built from the bottom up.</p> <p>What to Do: After 1 minute:</p> <ol style="list-style-type: none"> 1. Pair the participants together, (encourage folks to go to someone they do not know or barely know) and let participants know that they will get to know another participant a little better and that they are going to be introducing their partner. 2. Have them introduce themselves to their partner(s) by name, what local they are from, and share with them why they became a leader in AFGE. 	<p>Materials Needed: Flipchart Paper Markers</p>

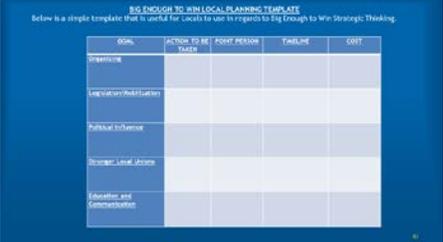
	<ol style="list-style-type: none"> 3. After 5 minutes (timing depends on the number of participants, allow more time for more participants) start calling on people to introduce their partner(s). 4. During the introductions: <ul style="list-style-type: none"> • Chart key words (values) as to why they became leaders. • Compare/contrast reasons participants became leaders. • Connect their values to AFGE's values. 	
	<p>Ask participants this question. Can use flipchart and markers to record responses.</p>	<p>Materials Needed: Flipchart Paper Markers</p>
	<p>First skill we will discuss is time management. As an AFGE leader, it will be very important to manage your time effectively. This as well relates to strategic planning because as you plan you will notice there will be a lot of things that come up, but everything can not be accomplished. Time management involves learning AND practicing first things first and put an order to everything. One helpful way to do this is called Eisenhower's Urgent/Important Principle. So, let's take a look:</p> <ol style="list-style-type: none"> 1. Important and Urgent There are two distinct types of urgent and important activities: ones that you could not have foreseen, and others that you've left until the last minute. You can eliminate last-minute activities by planning ahead and <u>avoiding procrastination</u> . However, you can't always predict or avoid some issues and crises. Here, the best approach is to leave some time in your schedule to handle unexpected issues and unplanned important activities. (If a major crisis arises, then you'll need to reschedule other tasks.) If you have a lot of urgent and important activities, identify which of these you could have foreseen, and think about how you could schedule similar activities ahead of time, so that they don't become urgent. 2. Important but not Urgent 	

	<p>These are the activities that help you achieve your personal and professional goals, and complete important work.</p> <p>Make sure that you have plenty of time to do these things properly, so that they do not become urgent. Also, remember to leave enough time in your schedule to deal with unforeseen problems. This will maximize your chances of keeping on track, and help you avoid the stress of work becoming more urgent than necessary.</p> <p>3. Not Important but Urgent</p> <p>Urgent but not important tasks are things that prevent you from achieving your goals. Ask yourself whether you can reschedule or <u>delegate</u> them.</p> <p>A common source of such activities is other people. Sometimes it's appropriate to say "no" to people politely, or to encourage them to solve the problem themselves. (Our article "<u>Yes' to the Person, 'No' to the Task</u>" will help here.)</p> <p>Alternatively, try to have time slots when you are available, so that people know they can speak with you then. A good way to do this is to arrange regular meetings with those who interrupt you often, so that you can deal with all their issues at once. You'll then be able to concentrate on your important activities for longer.</p> <p>4. Not Important and not Urgent</p> <p>These activities are just a distraction – avoid them if possible.</p> <p>You can simply ignore or cancel many of them. However, some may be activities that other people want you to do, even though they don't contribute to your own desired outcomes. Again, say "no" politely, if you can, and explain <i>why</i> you cannot do it. If people see that you are clear about your objectives and <u>boundaries</u> , they will often avoid asking you to do "not important" activities in the future.</p>	
 <p>The diagram illustrates the 7-S Model, a framework for organizational effectiveness. It consists of seven interconnected nodes arranged in a circular pattern. The top three nodes are red: Strategy, Structure, and Systems. The bottom three nodes are yellow: Skills, Staff, and Style. The central node is a yellow circle labeled 'Shared Values'. All nodes are connected to each other by thin lines, forming a complex web of relationships.</p>	<p>Suggested Language: As a leader at AFGE, you have the special task of seeing the view from the top. Due to your position in the organization, there is a level of expectation for all of you to see the bigger picture, communicate that bigger picture, and get members involved into that bigger picture.</p> <p>There are a lot of models for leadership/ or managing teams/organizations, one in particular is called the 7-S Model. This model as well as others are just useful ways to look into the complex elements of teams and organizations.</p> <p>With the 7-s model Strategy, Structure and System is the overarching themes, and will be how we will frame the skills section of this training.</p> <p>Strategy: Refers to the plan or route-map that guides your Local. What is your plan for the future? How do you intend to achieve the objectives? When was the last time you looked at your strategic plan? What were the actions you took after looking at it? When was the last time you updated your strategic plan? How do you deal with pressure? What are the sources of sustainable support? What are the key strategic priorities?</p>	

	<p>Structure: Refers to the framework in which the activities of the organization's members are coordinated. A key function of structure is to focus members' attention on what needs to get done by defining the work they do and whom they should be working with. How is the organizational structure designed right now? How is the team divided? How do the various departments coordinate activities? How do the team members organize and align themselves? Is decision making and controlling centralized or decentralized? Is this as it should be, given what you're doing? Where are the lines of communication? If you had to suddenly hire another 6 employees tomorrow, what would it look like? What changes would you have to make</p> <p>Systems: Refers to the day-to-day processes and procedures. Having effective systems helps reduce redundancy and streamlines process. How do you gather and share information? Do you have a unified database? If you have to put together a report on something, could you do it quickly? What happens if one of your staff leaves; will they take with them a key part of your Local's knowledge? What are the main systems that run the Local? What internal rules and processes does the team use to keep on track?</p> <p>One thing to point out is that these three things are highly inter-related and highly inter-dependent upon one each other.</p> <p>So over the next moments, we will go through a few key skills related to promoting a healthy structure, strategy and system for your Local. One of which is creating a Strategic Plan.</p>	
	<p style="text-align: center;">SWOT ANALYSIS</p> <p>Suggested Language: A big part of the Strategic plan is something you all may be familiar with and that is the SWOT analysis. A good SWOT analysis can help you with important decisions in your Local. The purpose of the SWOT analysis is to identify the Strengths, Weakness, Opportunities and Threats</p> <p>Strengths (internal, positive factors) Strengths describe the positive attributes, tangible and intangible, internal to your Local. They are within your control. What do you do well? What internal resources do you have? Think about the following: Positive attributes of people, such as knowledge, background, education, credentials, network, reputation, or skills. What advantages do you have? Overall positive aspects?</p> <p>Weaknesses (internal, negative factors) Weaknesses are aspects of your business that detract from the value you offer or place you at a competitive disadvantage. What factors that are within your control?</p>	<p>Materials: Participant WB</p>

	<p>What areas need improvement to accomplish your objectives? What does your Local lack (for example, expertise or access to skills or technology)? Does your Local have limited resources?</p> <p>Opportunities (external, positive factors) Opportunities are external attractive factors that represent reasons your Local is likely to prosper. What opportunities exist that you can benefit from? Is the perception of your Local/leadership/team positive? Is the opportunity ongoing, or is there just a window for it? In other words, how critical is your timing?</p> <p>Threats (external, negative factors) Threats include external factors beyond your control that could put your work/your Local at risk. You have no control over these, but you may benefit by having contingency plans to address them if they should occur. What factors beyond your control could place your Local/the work at risk? Are there challenges? What situations might threaten your efforts?</p> <p>Look in your participant workbook, on page_____ there is a planning sheet to think through what your SWOT consist of. Take a moment to think through a S W O T analysis of Local 9000 and start to jot a few things down.</p>	
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 <p>The diagram is titled "Strategic Planning" and is set against a blue background. It features a central circle labeled "Strategic Planning" with four smaller circles branching out to the right, each representing a phase of the process. Phase One is "Where are we now?", Phase Two is "Where are we going?", Phase Three is "How did we get there?", and Phase Four is "Are we on track?".</p>	<p style="text-align: center;">STRATEGIC PLANNING and BIG ENOUGH TO WIN</p> <p>Suggested Language: The creation and implementation of your Strategic Plan will hands down be the most important skill and tool you will use to effectively build out a sound strategy, structure and system.</p> <p>There is a well-known quote by Benjamin Franklin, "By failing to prepare, you are preparing to fail". One aspect of preparing yourself as a leader is doing what we have been doing this week. Engaging in training, learning and taking in as much knowledge as possible.</p> <p>The Strategic Plan involves bring everything together and answer two key things which is the what and the how. The Strategic Plan is your roadmap as a leader and should guide you in how you organize the PEOPLE and the WORK.</p> <p>The process of strategic planning looks different for different people, and there is a level two/advanced training that goes deeper into the strategic planning process. But overall, this is what you should know about strategic planning. You are answering these big questions (read off the slide).</p> <p>AFGE urges and encourages ALL unions to complete a strategic plan, in some way shape or form bc planning is a key step to becoming BIG ENOUGH TO WIN. THE</p>	
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	<p>KEY AREAS OF BeTW are: Organizing, Legislative Mobilization, Political Influence, Stronger Local Union (which we discussed earlier), and Education and Communication. As we go through discussing and practicing planning these are the areas you want to be mindful of. These are our strategic objectives, and now you all just have to the strategy and tactics in your Local and Councils.</p>	
	<p>On Page 32 of the PW is a chart that will help you as you think through how to make your Local Big Enough to WIN. Take a few moments to start to brainstorm some ideas.</p>	
	<p style="text-align: center;">ORGANIZING A TEAM</p> <p>Suggested Language: Of course this speaks directly to structure. Building out your committee structure will be imperative, because your committees will implement a lot of the work that will be done. Based on what you know about the programmatic goals of AFGE, What kind of committees do you think you will need at your Local? (Legislative/Political, Communications, Retiree/YOUNG, etc). In terms of creating a healthy structure, strategy and system, Mapping gives you an opportunity to look at what you need to know about your agency, bargaining unit(s), and work sites in order to be really effective in organizing and representing the employees. Some things you look at in mapping is:</p> <ul style="list-style-type: none"> • Mission of agency/agency division/location • Brief history of agency/agency division/location (date created, why) • Location(s) of agency/agency division • Whether other agency/agency division employees are represented by AFGE or other unions • Total number of employees of agency/agency division/location • Operational head of agency/agency division/location • Labor relations head of agency/agency division/location • Location(s) of BUEs • Functions performed by BUEs • Number of BUEs • Number of AFGE members • General demographics (age, gender, race, veteran status, disability status, length of service) 	

	<ul style="list-style-type: none"> • The Local should also be able to communicate with the bargaining unit employees as not just part of the bargaining unit but as part of a particular subset of employees, usually divided by function. In order to identify employees by functional groups, it is important to know: • Functions in the bargaining unit • Specific duties performed for each function • Locations for each function • Shifts for each function • Supervisors for each function • General employees concerns for each functional group • Occupational series, title, grade • Union leaders within each function • Number of AFGE members • General demographics (age, gender, race, veteran status, disability status, length of service) <p>There is also your Calling Circle, which is the skill of assessing the potential leaders you have around you.</p> <p>As you already know, Stewards are key components of your Local's structure. They are the main people our members count on, go to, depend on, communicate with etc. Member may have no clue who you are, BUT chances are they know their Steward. Important to build your steward structure.</p>	
 <p>The graphic features the AFGE logo (a blue shield with a yellow globe and the letters 'AFGE') on the left. To its right, the word 'Communications' is written in a blue, sans-serif font. Below the logo and text are four small, square photographs showing diverse groups of people in various settings, likely representing union members and their interactions.</p>	<p><u>Suggested Language:</u> An important skill that supports the work that you do within your Local is Communications.</p>	
 <p>The slide has a solid blue background. At the top, the word 'Communications' is written in a light blue, sans-serif font. Below it, there are four lines of white text, each preceded by a small white square bullet point. The text reads: 'Building relationships', 'Building the union', 'Connecting the union to employees', and 'Effecting change for employees'. At the bottom of the slide, the phrase 'Communication is a two-way street!' is written in white.</p>	<p><u>Suggested Language:</u> Communications is all about building relationships and building the union. Having a strong plan around communications at your local will ensure member are updated on important information and will in turn, increase trust amongst the membership. Communication also connects the union to employees and effect change for employees.</p>	

<p style="text-align: center;">Communications</p> <p>Consider:</p> <ul style="list-style-type: none"> • Your audience <ul style="list-style-type: none"> – Internal – External • The method 	<p><u>Suggested Language:</u> Two major things you should consider in Communications:</p> <ol style="list-style-type: none"> 1. Your audience and 2. Your method 	
<p style="text-align: center;">Newsletters</p> <ul style="list-style-type: none"> • Distributed to all employees • Should be simple, uncluttered; • Articles should be short, relevant, and to the point • Include pictures, graphics 	<p><u>Suggested Language:</u> Im certain all of you may be familiar with newsletters, whether you have worked on one, or read one, or seen one at your worksite. Here are some key points when it comes to newsletters: Read Slide</p>	
<p style="text-align: center;">Your Message</p> <ul style="list-style-type: none"> • Clear • Concise • Easily explains the issue and the Local's position <p>You should:</p> <ol style="list-style-type: none"> 1. Understand the issue 2. Understand the Union's position 3. Summarize in 20 seconds or less 4. Avoid jargon, technical terms, or acronyms 	<p><u>Suggested Language:</u> Newsletters are meant to be brief, eye catching, and informative. Writing for newsletters is good practice for messaging overall. When thinking about an overall message you want to consider these things: READ SLIDE</p>	
<p style="text-align: center;">Your Audience</p> <ul style="list-style-type: none"> • Who is your audience? • How are the concerns of your members relevant to the general public? <p><i>Read the editorial "Ban Government Employee Unions" on page 2-19 of your Participant Workbook.</i></p> <ol style="list-style-type: none"> 1. Name one political and economic assumption made 2. Identify two factual mistakes 3. List three reasons the public should support the ability of federal employees to act together to affect change in the workplace. 	<p><u>Suggested Language:</u> The biggest thing you should consider when you are crafting your message is your audience. READ SLIDE Ask the class what are some other things that should be considered when thinking about your audience.</p>	

<p style="text-align: center;">Talking to the Media</p>  <p>AFGE's policy:</p> <ul style="list-style-type: none"> • Contact your District, Council, or the National Office before speaking to the media 	<p>Suggested Language: Language on the slide.</p>	
<p style="text-align: center;">Legal Restrictions</p> <ul style="list-style-type: none"> • Don't defame anyone • Hatch Act regulates federal employee partisan activity – Resource Guide pages 2-3, 2-5, 2-7 	<p>Suggested Language: There are restrictions when it comes to Communications. You can not defame anyone nor can you commit slander or libel. Secondly, as I hand out this pamphlet, as federal employees, what you communicate is regulated to a certain extent. (Point out key points from the "Political Activity" pamphlet.</p>	
<p style="text-align: center;">Local Communications Planning</p> <ol style="list-style-type: none"> 1. Determine your goals 2. Develop a message 3. Evaluate where you are now <ul style="list-style-type: none"> – Tools? – Past topics/issues? – Resources? – Are you reaching your audience? 4. Evaluate success <ul style="list-style-type: none"> – How many people are you reaching? – How many of those people are engaging with your content? – How do you measure success? 	<p>Suggested Language: Communicating with membership is a vital function of the Local. Here are some basic steps to developing a communications plan for your Local:</p> <ol style="list-style-type: none"> 1. Determine your goals <ul style="list-style-type: none"> ➤ What is most important to communicate to bargaining unit members right now? In the near future? 2. Develop a message <ul style="list-style-type: none"> ➤ What is the most important thing for your audience to know? How does this relate to your strate 3. Evaluate where you are now <p>➤ Tools?</p> <ul style="list-style-type: none"> • Print • Digital • Face-to-face <p>➤ Past topics/issues?</p> <p>➤ Resources?</p> <p>➤ Are you reaching your audience?</p> <p>Evaluate success</p> <p>➤ How many people are you reaching?</p> <p>➤ How many of those people are engaging with your content?</p> <p>➤ How do you measure success?</p> <p>Visit AFGE's Communications Department website (www.afge.org/leaders-activists/education/communications-training) for more information and online trainings on topics such as: Storytelling/Messaging</p>	

	<p>Social Media Effective Newsletters Writing Tips</p>	
 <p>AFGE How to Run a Local Meeting</p> <p>AMERICAN FEDERATION FOR GOVERNMENT EMPLOYEES, AFL-CIO</p>	<p>Suggested Language: There may be varying levels of experience with this on the room, but one thing for sure is that as a union leader, you will definitely gain a great deal of experience with running local meetings.</p>	
<p>Union Meetings</p> <p>Goal: making members - new and old - feel welcome An effective meeting enables the Union to:</p> <ul style="list-style-type: none"> • Discuss problems and solutions • Get ideas for being more effective • Encourage participation • Build solidarity and community • Educate members about union goals • Bring complaints/conflicts out in the open <p><i>Local Officers Resource Guide, Chapter 9: Running Effective Union Meetings</i></p>	<p>Suggested Language: Language on the slide</p>	
<p>Planning Meetings</p> <ul style="list-style-type: none"> • Plan/organize ahead of time • Provide advance notice • Develop an agenda • Be sure the meeting space/time is convenient and accessible • Start and end on time • Run the meeting efficiently and democratically 	<p>Suggested Language: Language on the slide</p>	
<p>Agenda</p> <ul style="list-style-type: none"> • Call to Order • Roll call of officers • Reading minutes from previous meeting • President and other Officers' Reports • Committee Reports • Unfinished business • New business • Good and Welfare • Adjournment <p><i>Resource Guide page 2-53: Sample Local Member Meeting Agenda</i></p>	<p>Suggested Language: Language on the slide</p>	

<p>Parliamentary Procedure</p> <ul style="list-style-type: none"> • Only one subject at a time • Each proposal shall be freely debated • The will of the majority rules, but the minority has the right to present a case • Each member has rights and responsibilities equal to every other member • The desires of membership should move along such that the welfare of the organization as a whole is served 	<p><u>Suggested Language:</u> Language on the slide</p>	
<p>Parliamentary Procedure and Robert's Rules</p> <p>https://www.youtube.com/watch?v=FfnBGoKmbM</p>	<p>OPTIONAL video to show participants.</p>	
<p>Close Out/Next Steps</p> <ul style="list-style-type: none"> ✓ Complete the training evaluation ✓ Spend time with your notes/workbook ✓ Look for training opportunities 	<p style="text-align: center;">CLOSING</p> <p><u>Suggested Language:</u> Tell participants that they will receive an evaluation and that they should fill it in to help instructors keep improving the training.</p>	

