AFSCME

Officer Handbook

A Guide for
Local Union Leaders



CONGRATULATIONS

A LETTER FROM THE OFFICERS

Congratulations

on being elected as an officer or Executive Board member in your local union.

This is both an exciting and challenging time to be a local leader.

Working people are struggling to afford the cost of everyday goods. Billionaires and anti-worker lawmakers have targeted our rights to negotiate together in unions.

And yet every day, we go to work determined to provide the very best public services and to build the strongest possible local unions.

Informed, educated and active members are what make our union strong. Your most important task as a local leader is to find new ways to engage people, empowering as many members as possible to be full participants in conducting the union's business.

Being a local union leader is so much more than filing grievances. It's about building power in numbers. It's about creating a culture of activism. No matter what activity or task you're performing – anything from laying out a newsletter to mobilizing for a contract campaign – you need to ask yourself: How can we get more folks involved? How can we use this opportunity to make our local louder, stronger and more powerful so we can improve the lives of members and potential members?

This AFSCME Officers Handbook will provide many of the tools to help you. It is a practical guide that contains information on how to meet your important responsibilities. The handbook is a companion to the AFSCME Local Union Leadership Academy. For more information about the LULA, please contact your council or the International Union.

We are AFSCME. We care for children, drive school buses, nurse the sick, plow roads, collect the trash, walk the beat on our streets and in our correctional facilities, and so much more. We take great pride in our work, and we never quit no matter what. We believe that everyone who dedicates their career to strengthening their community through public service deserves respect. And we fight for that respect by organizing powerful local unions.

Leading those local unions is a critically important job, and we know it isn't easy. We're grateful for your commitment to this hard work, and we stand ready to provide support in any way we can.

In solidarity,



Patrick Moran
President

Nicole R. Pollard
Secretary-Treasurer

AFSCME
We Make America Happen

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AFSCME
We Make America Happen

PREFACE

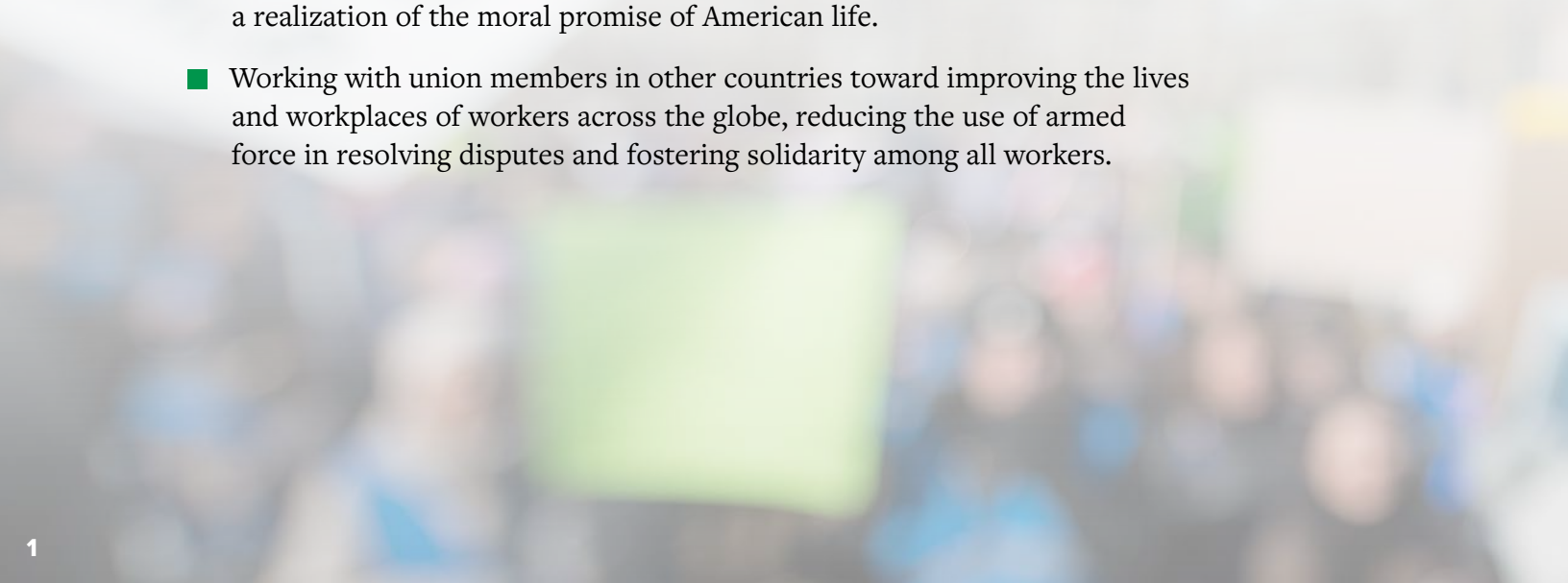
The work of AFSCME local union officers rests on two pillars: AFSCME's mission as a union and the rights enjoyed by all AFSCME members.

Both pillars are found in the AFSCME International Constitution, and they are guiding lights in the day-to-day activities of local union officers. Our union's mission is the destination. The rights of members represent our union's values, and they fuel our union's drive toward meeting its mission.

AFSCME'S MISSION

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

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



Our Union's Mission, Our Members' Rights

THE RIGHTS OF AFSCME MEMBERS

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

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



SECTION 01

AFSCME Strong: Our Strategy for Success



Recent polling indicates that the American people hold unions in historically high esteem.

Seventy percent of workers say that if they had the opportunity, they would vote for union representation. That's because they know that having a union and a voice on the job means better pay, better health care, a more secure retirement, and so much more. Being part of a union means having a say in safety, staffing, working conditions, and other important issues. Americans know from experience that most employers don't willingly give these things to us – rather, through our unions, workers have collectively built power and negotiated for improvements and fair treatment over the years. Unsurprisingly, there are some who attempt to weaken union power. Ties between the ultra-wealthy and some in government positions of power have never been closer. They want to weaken our ability to win better wages, hours and working conditions. But our union has been under attack many times throughout the decades, and we know what it takes to grow and sustain our worker power at the bargaining table and beyond so we can continue to negotiate strong contracts and provide the quality public services our communities depend on.

We have a strategy for success, and it's called **AFSCME Strong.** AFSCME leaders from across the country and elected delegates to International AFSCME's National Union Conventions have endorsed AFSCME Strong as a road map to build and sustain a strong union and win victories for public service workers and all AFSCME members at the local, state and national levels.

The priorities of this plan include: increasing our union's membership both within current AFSCME local unions and by helping nonunion workers at other employers join our union; building power through political and legislative action; building the strength needed by every council and local to be successful in collective bargaining and direct action to win improvements; building coalitions with allies who support the work we do and the services we provide; and above all, getting more members involved in our union.

And all of this begins with strong local unions. This handbook is a resource to help council and local union leaders and members build and maintain the strength and collective power needed to successfully advocate for workers, win improvements, and protect the vital services AFSCME members provide our communities. A model of an effective union is below. A checklist for a powerful local union is on the next page.



100% AFSCME STRONG
LOCAL UNION CHECKLIST

New Employee Outreach

Is there new employee orientation language in the contract?	☐ Yes	☐ No
Does the local have a new employee outreach plan *beyond attendance at NEOs?*	☐ Yes	☐ No
Does the plan include multiple one-on-one discussions, *tracking, and follow-up?*	☐ Yes	☐ No
Is the plan implemented by trained leaders who carry out their responsibilities?	☐ Yes	☐ No

Membership Outreach

Is there a Membership Chair or Member Action Team (MAT) Coordinator?	☐ Yes	☐ No
Has every represented non-member been contacted and asked to join our union?	☐ Yes	☐ No
Is there a trained MAT to ensure one-on-one communication with all members?	☐ Yes	☐ No
How many MAT activists have been trained and are active?	_____	
Is there an ongoing effort to sign up members to become PEOPLE MVPs?	☐ Yes	☐ No
Are at least 10% of members on the PEOPLE MVP level?	☐ Yes	☐ No

Local Union Activism/Engagement

Does the local get members involved in contract fights or actions on other issues?	☐ Yes	☐ No
Does the local recruit volunteers for political and organizing campaigns?	☐ Yes	☐ No
Is the local active in the community?	☐ Yes	☐ No
Does the local have social gatherings – picnics, movie nights, etc.?	☐ Yes	☐ No
Does the local belong to the Central Labor body?	☐ Yes	☐ No

Equity and Inclusion

Is the local's leadership representative of the membership in terms of race, gender, language, and other differences?	☐ Yes	☐ No
Does the local rigorously enforce the contractual anti-discrimination clause?	☐ Yes	☐ No
Does the local have plans or programs to prevent discrimination and promote diversity, inclusion, and equity?	☐ Yes	☐ No

External Organizing

Does the local have neutrality, card-check, or member organizer union leave provisions in the contract to support growth?	☐ Yes	☐ No
Are there unorganized employees providing the same service in your jurisdiction? If so, who? _____	☐ Yes	☐ No
Are there unrepresented titles or bargaining units at your worksites?	☐ Yes	☐ No

Local Union Communication

Does the local union have a newsletter or bulletin that comes out regularly?	☐ Yes	☐ No
Does the local use mass communication – Facebook, text messages, robocalls, etc.?	☐ Yes	☐ No

Membership Meetings

Does the local have regularly scheduled membership meetings?	☐ Yes	☐ No
Does the local publicize information about when/where meetings are held?	☐ Yes	☐ No
Are the meetings well-run – clear agenda; members made to feel welcome, etc.?	☐ Yes	☐ No
What is the attendance?	_____	

Financial Accountability

Does the local provide Treasurer reports at membership meetings?	☐ Yes	☐ No
Have the Treasurer and other officers attended the AFSCME Treasurer training?	☐ Yes	☐ No
Are AFSCME's financial standards followed?	☐ Yes	☐ No
Do the local's trustees examine the local's books?	☐ Yes	☐ No

Data

Does the local receive frequent electronic member and bargaining unit lists from employers including job titles, work location, and seniority information?	☐ Yes	☐ No
Do these files get incorporated into the membership database regularly?	☐ Yes	☐ No
Does the local prioritize collecting personal emails and cell numbers at union events?	☐ Yes	☐ No
Does the local have a workplace tool that tracks membership, activists, and other key criteria and update them regularly?	☐ Yes	☐ No

SECTION 02

Officer Duties and Ethics

Oath of Office

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

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

Each local union officer has specific duties, which are described in the local's constitution. The standard constitution for local unions, which is found in **Appendix C of the International Constitution,** lists those duties for each officer (a local union may adopt its own constitution, which must conform to the provisions of the International Constitution and which must be approved in writing by the International President). In addition, the AFSCME Financial Standards Code contains a list of financial duties for each officer (see pages 22-23 in the appendices to the Code). You can find the International Constitution and the AFSCME Financial Standards Code online at afscme.org/about/governance.

Some guidelines covering the responsibilities of each office are presented below.

THE PRESIDENT'S CONSTITUTIONAL DUTIES

- Preside over all membership and Executive Board meetings
- Be a member of all local committees, except the Elections Committee
- Counter-sign checks drawn against the local's funds
- Appoint all the local's committees (subject to the Executive Board's approval)
- Periodically report to the membership and the Executive Board on the "state of the local"

In addition to their constitutional duties, the president, as the chief officer in the local, regularly takes on other roles and responsibilities. Like all officers, the president must make organizing and signing up members a priority, as this is critical to maintaining a strong, effective union capable of helping members win improvements.

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

THE VICE PRESIDENT'S CONSTITUTIONAL DUTIES

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

In many locals the vice president is the chairperson of a prominent standing committee, such as the Membership or Organizing Committee, an important committee that all locals should have to maintain strength and power. This provides a direct link from the Executive Board to the work of an important committee. The vice president can also serve as a stand-in for the president in such roles as ceremonial officer or representative to the community.



THE SECRETARY-TREASURER'S CONSTITUTIONAL DUTIES

- Receive and deposit the local's funds in a bank and prepare monthly bank reconciliations
- Prepare and approve checks and electronic payments for the local's expenditures
- Prepare and submit monthly financial reports to the Executive Board
- Obtain Surety Bond coverage at the expense of the union through the International Union
- Maintain the local's financial records and make them available as necessary for Trustee and CPA audits
- Submit required financial reports to the International Union and governmental agencies
- Act as a custodian of the local's property and conduct the fiscal affairs of the local in a responsible manner
- Submit a monthly membership report to the International Union and ensure the monthly per capita tax payments are made (Note: In most councils, these functions are performed for the locals by the council)

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



Resource Alert

AFSCME Secretary-Treasurer Online Resource Center (STORC)

This online resource provides quick access for downloadable forms the union is legally required to file, as well as video tutorials and printable handouts to help explain the financial reporting process. In addition, both the **Financial Standards Code** and the **Secretary-Treasurer Educational Workshop Manual** (in English and Spanish) can be found on the STORC.

The **AFSCME Financial Standards Code** establishes the minimum standards for keeping local union financial records. All expenditures must be for legitimate union purposes and must have proper authorization – that is, by a vote of the membership or Executive Board (payments required by law or your union's constitution require no additional authorization). The AFSCME Financial Standards Code also requires all councils and locals with 2,000 or more members to submit their annual budget, CPA audit, and quarterly financial statements to the International Union.

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

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

THE RECORDING SECRETARY'S CONSTITUTIONAL DUTIES

- Keep a record (minutes) of membership and Executive Board meetings
- Handle the local's official correspondence

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

THE TRUSTEES' CONSTITUTIONAL DUTIES

- As specified in the local's constitution (but at least annually), audit the local's finances (or oversee an audit) and report the audit's results to the membership.

Trustees may arrange for the annual audit to be conducted by a certified public accountant (CPA). Trustees conducting their own audit should consult the Trustees Audit Guide on pages 42-49 and the Audit Checklist on pages 50-52 of the AFSCME Financial Standards Code. Once completed, copies of the audit should be reviewed by the Executive Board and discussed at the membership meeting. A copy should be sent to the International Secretary-Treasurer. Because their sole function is to guarantee the members' "right to a full and clear accounting of all union funds," the trustees must be independent and not voting members of the Executive Board.

Local Union Officer Duties Per AFSCME Constitution

Duties and Responsibilities	Officer Responsible
Chairs local union membership meetings	President
Presides at meetings of the executive board	President
Is a member of all committees (except the Elections Committee)	President
Countersigns checks drawn on the local's funds	President
Appoints all standing and special committees	President
Reports to membership on official acts, standing of local, actions taken by the executive board	President
Assists the president in the work of the president's office	Vice-President
If executive board approves, co-signs checks in place of pres. or sec-treas.	Vice-President
When president is absent/unable to serve, carries out president's duties	Vice-President
Keeps minutes of membership meetings	Recording Secretary
Keeps minutes of executive board meetings	Recording Secretary
Writes & answers local's correspondence, unless Executive Board says otherwise	Recording Secretary
Performs other duties that the executive board may require	Recording Secretary
Receives money for the local	Secretary-Treasurer
Writes receipts for money received by the local	Secretary-Treasurer
Deposits in a bank any money received by the local	Secretary-Treasurer
Signs checks drawn on the local's funds	Secretary-Treasurer
Writes checks required by the constitution or authorized by membership or the executive board	Secretary-Treasurer
Prepares and submits monthly membership reports to the International union	Secretary-Treasurer
Sends monthly per capita payment to the International Secretary-Treasurer	Secretary-Treasurer
Keeps the local's financial records	Secretary-Treasurer
Submits to the membership a monthly financial operating statement	Secretary-Treasurer
Acts as custodian of local union property	Secretary-Treasurer
Sees that financial reports required by the constitution are sent to the International	Secretary-Treasurer
File annual Form 990 with the US Internal Revenue Service	Secretary-Treasurer
File annual Labor Management reports (LM-2,3 or 4) with the U.S. Department of Labor's Office of Labor Management Standards (locals with private sector members)	Secretary-Treasurer
Responsible for conducting audit of local's finances, done at least semi-annually	Trustees
Reports to membership on results of each audit of local's finances	Trustees
Are not members of the Executive Board	Trustees
Governs the local except when membership meetings are in session	Executive Board
Makes decisions on policies, aims and means of accomplishing the purposes of the local when not provided for in the constitution or by membership action	Executive Board
Meets as specified in the local's constitution and at call of President or a majority of the Executive Board	Executive Board
Approves appointments to the local's standing and special committees	Executive Board
Selects the bank where local funds are deposited	Executive Board
Requires a majority of members for a quorum at meetings	Executive Board

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

Some Tips for the Ethical Union Leader

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



Administrative and Leadership Responsibilities

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

TYPICAL ADMINISTRATIVE TASKS INCLUDE:

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

But local union leaders also have leadership responsibilities. These are the tasks that build your local union's strength and effectiveness and lay the groundwork for future growth and success. Effective leaders include these kinds of tasks among their priorities, along with their administrative roles.

TYPICAL LEADERSHIP TASKS INCLUDE:

- Organizing non-members and unrepresented workers
- Promoting an inclusive culture in which all members feel welcome and represented
- Creating a one-on-one communication structure
- Recruiting members to become involved in your union's activities
- Educating members on issues/problems facing your union through meetings, newsletters, social media and emails
- Creating opportunities for membership activity (e.g. for job actions, legislative campaigns and/or PEOPLE drives)
- Regular assessment of your local union and planning for the future

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

SECTION 03

Strategic Planning for Strong, Effective Locals



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

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

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

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

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

A Vision for the Future

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

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

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

A sample mission statement is as follows:

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

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

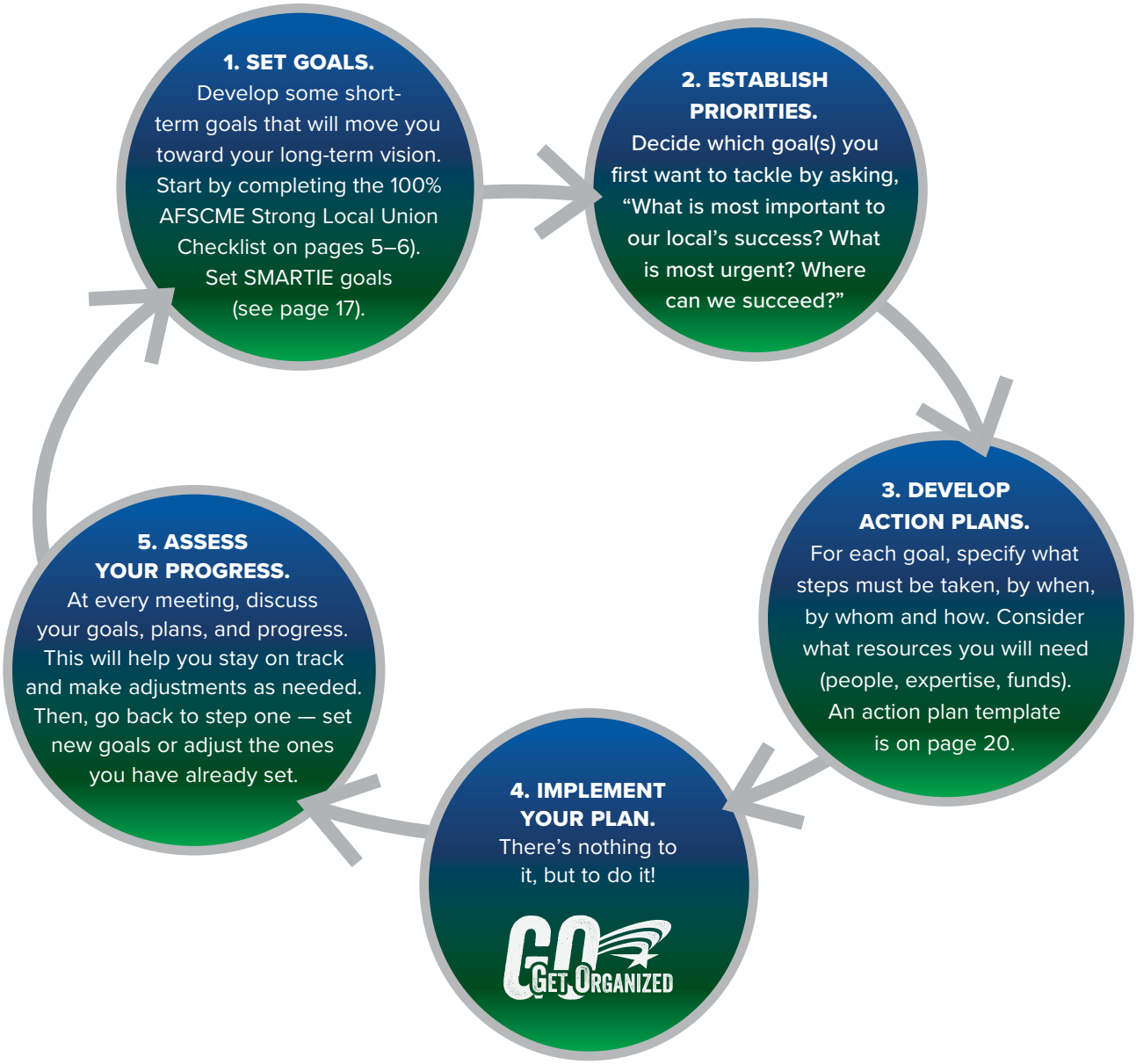
Here are some good questions to use to assess your progress towards goals:

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



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

STRATEGIC PLANNING: FIVE STEPS FOR SUCCESS





S.M.A.R.T.I.E. GOALS

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

SPECIFIC Identify a specific result or outcome to be achieved.

MEASURABLE Be able to quantify — and verify — the results.

ASSIGNABLE Determine who will do it.

RESOURCES The local union has the time, knowledge, expertise, personnel and/or finances to accomplish the goal.

TIME-BASED Specify when the result will be achieved.

INCLUSIVE Bring traditionally excluded individuals and/or groups into processes, activities and decision/policy-making in a way that shares power.

EQUITABLE Includes an element of fairness or justice that seeks to address systemic injustice, inequity, or oppression.

EXAMPLES OF VAGUE GOALS AND SMARTIE GOALS

Vague	SMARTIE
Increase membership	During the month of November, each member of the Executive Board and all stewards will have ten conversations each with non-members about joining our local and identifying potential new leaders among underrepresented groups.
Increase the number of stewards	Have the chief steward recruit and train three new stewards (including one who is bilingual from an underrepresented group) in the Maintenance Department by May 1.
Improve communication with members	Appoint a diverse, three-member newsletter committee by April 1 to produce and distribute a two-page monthly newsletter featuring member stories beginning on June 1.
Increase political involvement	Increase participation in the PEOPLE program to 15 percent of current members by August 1 utilizing a diverse team of union activists.
Improve attendance at meetings	Have each officer and each steward bring one new member from a department or community least likely to be heard to provide an opportunity to share their specific concerns to the August 15 membership meeting.



Resource Alert!

The **AFSCME Education Department** provides strategic planning. Contact your council or parent local for more information.

Local Union Action Plan Template

Objective: _____

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

From Goals to a Plan of Action

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

1. Set goals
2. Establish priorities
3. Develop action plans
4. Implement your plan
5. Assess your progress and set new goals

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

SAMPLE ACTION PLAN

Goal: During the month of May, each member of the Executive Board and all stewards will have ten conversations each with non-members about joining our Local and identifying potential new leaders among underrepresented groups.

Task	Deadline	Person Responsible
Obtain an up-to-date list of all members and potential members of the bargaining unit	April 14	Carol (Membership Chair)
Map and chart the location and MAT leaders and shift of all bargaining unit members	April 21	Willa (MAT captain)
One-on-One Conversations training	May 1	Executive Board, Education staff
Assign each board member and all stewards specific lists of workers to talk with	May 1	Executive Board
Lunch with the Bunch	May 7	Stu (president) and Willa
Mid-point check-in	May 15	Executive Board
Evening social	May 21	Executive Board
Debrief how the effort went	June 1	Executive Board

SECTION 04

Motivating and Activating the Membership



The primary responsibility of union leadership teams is to develop strong, effective local unions.

A variety of factors play a role in this. Two key factors are **1**) high membership in your local: management knows how many people belong to your union. When you have a high percentage of membership – such as 95% – that shows management that you have a powerful local, which results in management taking you more seriously in contract negotiations, representation and everything else you do as a union. Similarly, if you have low membership, management knows that as well, and this negatively impacts your ability to win improvements; and **2**) an active and engaged membership. Whether members are signing a petition, voting in an election, coming to meetings, or writing letters to the editor — an active union is a strong union.

Organize to Build Power

The most successful local union leaders dedicate significant energy to internal organizing, which can be defined as strengthening your union by both membership sign-up and build-up. Sign-up means recruiting members by signing up all new employees and non-members on union cards; build-up means recruiting more members to be activists and reinforcing

our structure and capacity to successfully fight for improvements. Every activity your union does should be viewed through an organizing lens. Ask yourself, "How can we use this event (grievance, negotiation, election, meeting, orientation, etc.) to strengthen our membership numbers and increase participation in our union?" When your union's reaction is, "We have our hands full – first we'll wage the fight, then we'll get around to signing up members and building up our structure," it's understandable, but wrong. First, because a union that reinforces itself by sign-up and build-up is more likely to win its fight. Second, because it's easier to take advantage of the urgency of a campaign and accomplish sign-up and build-up while in the middle of the fight than after it's over.

Communicate to Motivate

Without a doubt, strong communication is critical to increasing member participation. Local union leaders communicate with the membership, as well as the larger bargaining unit, for a number of reasons — to inform, to educate, and to learn from the members and non-members what's on their minds. There is one reason to communicate that should always be paramount — and that is to encourage, to motivate and to inspire members to act.

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

- Talking with members and potential members one-on-one
- Holding regular membership meetings
- Setting up small-group worksite meetings
- Communicating through emails, texts, social media, and websites
- Informing through other publications such as leaflets and newsletters
- Posting updated information on bulletin boards

All these methods have a place in a local's communication system.

However, one method far surpasses the others: one-on-one, face-to-face.

One-on-ones are especially helpful when the goal is to motivate workers to take action, such as to join our union, sign a petition or letter to a legislator, participate in an action, attend an upcoming meeting or participate in a lobby day.

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

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

Five Steps of One-on-One Communication

1. Introduce yourself to the worker and explain why you are talking with them. Create a sense of urgency about the need to have this conversation now.
2. Use active listening skills to find out about the worker and their issues and concerns.
   - Ask open-ended questions such as: How are things going on the job? What are things the worker is happy with and/or feels need to be improved? How do they feel about a particular issue that you are speaking about (i.e., a political issue, a problem at work)? It is important to take time to interact with co-workers in a deep way, which helps to build trust and solidarity.
3. Educate about our union and what can be done to build power and solve problems.
   - "If we take up this issue as a group, management (or the legislature) will be more likely to listen."
   - "Standing together, we can take an active role in improving our jobs."
   - If you are speaking with the worker about a political issue, explain how it affects the workforce.
4. Assess and Move to Action. Every conversation should include an "ask." During the conversation, you will have to make an assessment to determine just what that ask should be. Examples include:
   - Will you stand with your co-workers to help solve this problem?
   - Will you sign a membership card?
   - Will you come to a meeting next Tuesday?
   - Will you sign this postcard/petition?
   - If possible, give the worker a choice of actions to take and connect the task to an issue or problem they care about.
5. Inoculate the worker against push-back from the employer or obstacles to organizing. Let them know that organizing is not a panacea, but by standing together we can win on the issues that are important to us.

NOTE: It's important to not only communicate with members, but also with potential members in your bargaining unit, meaning those who have not yet joined your union. This will help you learn more about what potential members care about, educate them about your union's efforts and successes, and ultimately encourage them to join our union.

When you are having conversations with members and potential members, it's important to be respectful of differences, seek to find commonalities and avoid making assumptions or stereotyping.

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

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

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

What is a MAT?

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

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

MAT LEADER RESPONSIBILITIES

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

How Does the MAT System Work?

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

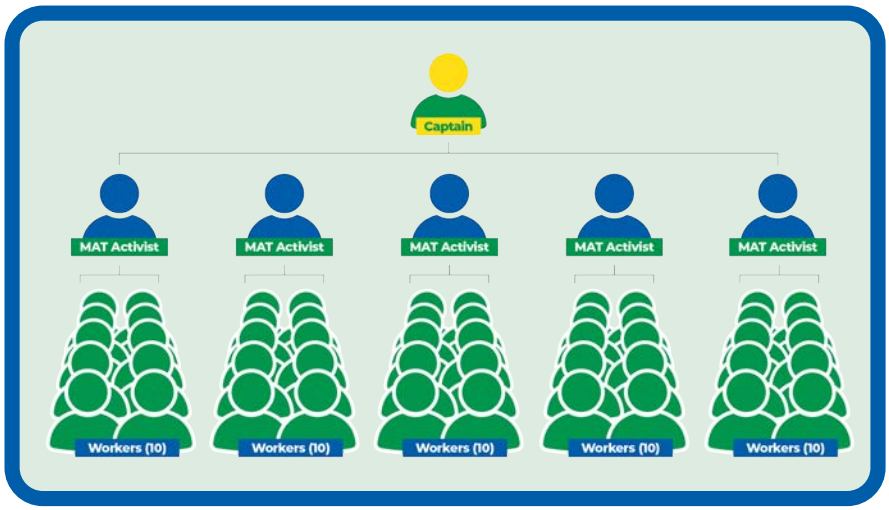
1. Map or chart the local's worksite(s) — the map should be a physical layout and contain:
   - ☐ Who — names of workers
   - ☐ Where — location of workers
   - ☐ When — shifts of workers
   - ☐ Whether or not workers are union members
   - ☐ Where current union leaders and activists are located
2. Each leader — officer, Executive Board member and steward — identifies 10 co-workers to be part of their Member Action Team.
3. Brainstorm to identify other possible MAT leaders, especially in work areas where there are "holes" in union leadership/activism. Check for diversity in race, gender, age, disability, and other differences to ensure that all communities in the bargaining unit are represented at this level. Consider going deeper into the membership than you have in the past and recruiting people who have played little role in your union. In particular, look for:
   - ☐ Good communicators
   - ☐ Natural leaders in the workplace
   - ☐ People who are respected by co-workers
4. Approach and recruit new MAT leaders and help them establish their MAT teams.
5. Decide on a common communications task — distribute a questionnaire, hand out a leaflet, etc. — and ask each MAT leader to have a one-on-one conversation with each of their 10 co-workers.
6. Meet regularly to continue to build the MAT network, communicate with and mobilize members, and monitor and evaluate the network's effectiveness.
7. Hold MAT leader training by contacting the AFSCME Education Department or your council or local staff or leadership.

Once in place, a MAT system can be used for its main purpose: to communicate with members and motivate them to take action on issues they care about. But not all issues are ideal for member mobilization. Use the Campaign Planning Worksheet on page 27 to analyze and to help determine what course of action you should take on a given issue.

MAT STRUCTURE

In the diagram, one or two of the MAT activists would also be stewards responsible for handling grievances.

As locals develop their MATs, they can also develop MAT captains who coordinate the activities of MAT activists and their teams.



Delegating — A Means of Building a Strong, Effective Union

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

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

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

Campaign Planning Worksheet

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

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

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

   Is the issue easily understood? Yes ❑ No ❑

   Is the issue non-divisive? Yes ❑ No ❑

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

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

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

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

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

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

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

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

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

Possible Actions:

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

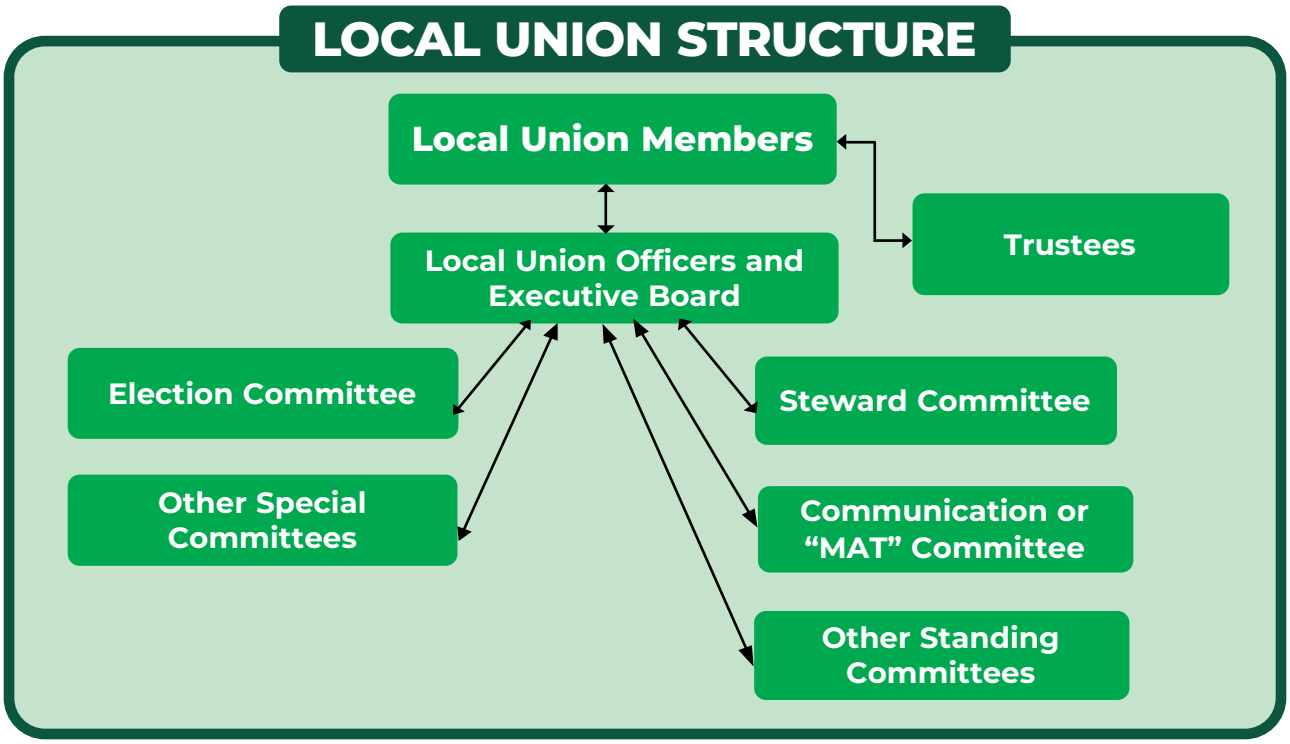
SECTION 05

Local Union Structure and Committees



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

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



Some Basics About Committees

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

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

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

Active and Effective Committees

For each committee the local establishes:

- Identify a clear purpose for the committee.
- Appoint a chairperson (to facilitate meetings, delegate responsibilities, coordinate the work, etc.) and a recorder (to take notes and keep records).
- Recruit members for the committee that reflect the diversity of your union's membership (shift, work area, age, gender, race/ethnicity, sexual orientation).
- Involve all committee members in the committee's work. Each person should have responsibility for specific tasks with a specific time frame.
- Set a regular date, time, and place for committee meetings.
- Hold short and well-organized meetings, preferably at work.
- Maintain regular communications with all committee chairs.
- Require each committee chair to give a report at local membership meetings. Reports can summarize the committee's activities and/or make recommendations on actions the local should take.
- Give recognition for achievement.

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

MEMBERSHIP OR ORGANIZING COMMITTEE

Purpose: Maintain high levels of membership and build relationships with existing members, non-members, and new employees through regular engagement.

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

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

- Maintain accurate information on people in the bargaining unit and their membership status.
- Plan and execute membership drives to sign up non-members.
- Keep track in a database of union contact with all employees.
- Implement the local's New Employee Outreach (NEO) program, including:
  - Make sure a union leader or activist speaks at all employer-sponsored new employee orientations
  - If there is no employer-sponsored orientation, ensure new employees have a personalized union orientation through a one-on-one conversation by a union leader or activist
  - Make certain that new employees have an interaction with their union during their first week of employment plus two more during their first month.

BARGAINING COMMITTEE

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

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

- Pre-bargaining tasks include:
  - conducting research on bargaining topics (wages, health care, etc.)
  - determining the membership's needs and opinions through meetings, surveys conducted by the Member Action Team, etc.
  - reviewing the current contract for areas to improve and reviewing the grievance files to determine areas where there have been challenges in enforcing the contract
  - establishing priorities and preparing contract proposals

- Bargaining tasks include:
  - exchanging proposals with management and bargaining over those proposals
  - maintaining records (notes) of what was discussed and intended during contract talks
  - communicating with members about progress in negotiations
  - mobilizing members to participate in actions to support negotiations
  - reaching a tentative agreement on a new contract
- Post-bargaining tasks include:
  - implementing a ratification plan to vote on the tentative agreement
  - making a recommendation to the membership on whether or not to ratify the tentative agreement
  - signing up new members and PEOPLE contributors at the ratification meeting
  - informing and educating the membership about the new contract



Resource Alert

The **Collective Bargaining Tool Kit** contains resources such as a bargaining team training curriculum, a checklist of contract clauses, sample bargaining surveys, links to other contracts, useful statistics for bargaining and much, much more. Reach out to your staff representative to access the resources.

COMMUNICATIONS COMMITTEE

Purpose: Keep members, potential members, and the community you serve informed and active about the issues in your union, including union campaigns, union wins, union political activities, and the union's point of view.

- Building a strong local union includes consistent and effective communications with your members and the broader public. You must be visible in the workplace and the community. Maintain a current list of your members' email addresses so you can contact them regularly.
- Your communications committee should produce a printed and/or email newsletter that highlights member stories and successes of their union. Ideally, you can produce this monthly. It could also include regular features like "know your rights" and a message from union leadership.

The committee should also build the basic parts of an online presence for your union, including:

- A website that lists contact information, officer information, the latest news, and upcoming events.
- Social media accounts on major sites like Facebook, Instagram, X, TikTok and Bluesky, depending on which ones your members use and how you'd like to communicate with them.

Your communications committee should also be responsible for producing print materials like flyers, leaflets and fact sheets on the issues and campaigns your members are working on.

Resource Alert

Union Hall is a free tool for AFSCME affiliates that helps you easily create and maintain a professional website without any technical skills. To learn more and get started, reach out to your council and the International Union's Regional Communications Coordinator.

Finally, the committee should establish contact with local media that focuses on labor, government and politics. It should issue releases to those members of the media – print, radio, TV and online – about the successes your union has and positions on relevant issues.

COMMUNITY ACTION COMMITTEE

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

Activities of a community action committee might include:

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

EDUCATION COMMITTEE

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

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

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

ELECTIONS COMMITTEE

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

The duties of the election committee include:

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

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



Resource Alert

AFSCME Local Union Election Manual is available on AFSCME's website:

www.afscme.org/about/governance/local-union-election-manual

HEALTH AND SAFETY COMMITTEE

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

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

- Gathering information on workplace health and safety hazards
- Educating members and helping stewards write effective grievances concerning health and safety issues
- Mapping risks and investigating accidents
- Recommending to management ways to prevent accidents and injuries
- Maintaining records on hazards, accidents, illnesses, and complaints
- Being familiar with Occupational Safety and Health Administration (OSHA) regulations as well as state or local health and safety regulations
- When appropriate and necessary, filing formal complaints with OSHA, the Environmental Protection Agency (EPA), or the proper state or local agency

Resource Alert

AFSCME International Union offers **in-person and virtual health and safety trainings** for workers across AFSCME sectors, including OSHA General Industry training, dozens of health and safety fact sheets, model health and safety contract language and more. Reach out to your staff representative for access.

POLITICAL ACTION/PEOPLE COMMITTEE

Purpose: Advance the mission of your union and win improvements for members through member engagement in political and legislative action.

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

AFSCME supports or opposes candidates based on their positions on issues important to working families and their communities. Actions are decided and implemented by AFSCME union members through our Political Action/PEOPLE Committees. Here are some tasks for a year-round Political Action/PEOPLE committee:

- Inform and educate members on issues of importance to working families
- Enroll 10%of members in the PEOPLE Political Action Committee at the MVP level ($100 per year)
- Work with your council and the International Union to schedule PEOPLE "blitzes" two times a year. A blitz is a scheduled event where local committee members, other activists and staff from the council and national union help with a PEOPLE drive at your local.
- Register at least 90%of members to vote
- Identify, recruit and train 3 percent of members as grassroots political activists; these should be people who are dedicated to achieving your 10% PEOPLE goal and educating membership about how legislative wins and PEOPLE are related to contract negotiations and other important achievements
- Deploy 2% of members as Election Day volunteers
- Organize lobby days to make members' voices heard at state capitals, city halls, and county boards.
- Schedule and conduct endorsement and screening meetings for candidates for state and local offices in order to identify and support worker-friendly candidates, and engage the membership in the process

- Communicate with worker-friendly candidates and help elect them to office
- Educate elected public officials on issues of importance to AFSCME families
- Hold politicians accountable for their actions through constant interaction, supporting those who support us and opposing those who are not serving AFSCME members' interests

STEWARD/GRIEVANCE COMMITTEE

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

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

- Discuss current and potential grievances and share ideas on how those cases should be handled
- Learn what's happening at different worksites in the local and develop strategies to address current challenges and opportunities
- Increase understanding of the contract, work rules, policies, and regulations
- Celebrate victories and decide how to publicize those victories in the workplace
- Sharpen skills and build the confidence of new stewards and provide ongoing education for all stewards

Resource Alert

AFSCME Steward Handbook is available online at www.afscme.org/about/governance

EQUITY & INCLUSION COMMITTEE

Purpose: foster stronger engagement across differences and bring about equity and inclusion in every area of our union.

AFSCME has historically been engaged in fighting segregation, racism, inequities, and discrimination on the basis of gender and other differences. We work to build workplaces and communities that live up to the values of fair wages and just and inclusive institutions. This commitment is essential to our union's identity and has gone hand in hand with our right to organize and to negotiate fair and equitable union contracts. Since our first annual convention in Detroit, Michigan, in 1936 with the passage of Resolution #30 where delegates committed to fight against the racist and discriminatory practices against AFSCME workers in the city of Detroit, AFSCME has remained firm. From organizing workers in southern states in hostile environments during the 1940's and 1950's, to fighting alongside the Memphis Sanitation workers in the 1960's for dignity, respect, and fair treatment, to staging the nation's first-ever strike over the issue of pay equity for women in 1981 and up to the current day, AFSCME has continued its efforts to bring about equity and inclusion in our workplaces and communities.

AFSCME has passed several resolutions to address racial justice and public safety and confront racism and gender inequities in our communities and workplaces. Training on implicit bias, among other topics, has led to assisting AFSCME councils and locals in focusing on internal change, as well as external change, to foster stronger engagement and bring about equity and inclusion in every area of our union.

An equity and inclusion committee could take on tasks such as:

- Surveying members and identifying what their equality concerns are
- Reviewing grievances and identifying what equality issues were grieved
- Sponsoring training around issues of racial, social, gender and economic justice
- Making recommendations to the Executive Board about short-term and long-term priorities to move equity and inclusion issues forward, such as educational programs, organizing, and grassroots legislative or political action

Resource Alert

AFSCME's Education and Leadership Training Department offers resources to advance equity and inclusion in our union, such as a **Local Union Equity Checklist, training programs to support women leaders, racial equity and gender justice, and more.** You can also find a Local Union Equity Checklist in Appendix G. To explore these resources, contact your council or reach out to the national union.



SECTION 06

Working as an Effective Leadership Team



What is a team?

A team is two or more people who must coordinate their activities to accomplish a common goal. Is your local union Executive Board a team? If it's not, perhaps it should be!

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

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

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

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

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

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

Team Development: Forming, Storming, Norming and Performing

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

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

FORMING:

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

If your team is forming:

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

STORMING:

- Different ideas compete for consideration.
- Team members become more anxious about their ability to succeed.
- Factions may form. Tensions rise.
- Sometimes people "act out" or "check out."
- Some teams resolve storming quickly. Others get stuck here. To get out of it, the team has to learn to engage in healthy conflict and tolerate differences.

If your team is storming:

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

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

NORMING:

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

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

If your team is norming:

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

PERFORMING:

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

If your team is performing:

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



Resource Alert

The AFSCME Education and Leadership Training Department provides **organizational development and teamwork training** for local union leadership teams. Organizational development is a systematic, planned process that helps organizations improve their effectiveness and growth by making changes to their strategies, procedures and culture. Contact your council or parent local for more information.

AFSCME Local Union Leadership Academy

What is the Local Union Leadership Academy (LULA)?

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

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

"More hands make for lighter work."



team building

"It takes the board collectively to run effectively."



planning a project



leading the local

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

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

SECTION 07

Making Union Meetings Work



The local membership meeting is the heart of a democratic union.

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

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

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

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

Ten Tips for Planning Successful Meetings

Carefully plan and organize the meeting ahead of time.

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

Tips for Running Results-Oriented, Motivational Meetings

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



Resource Alert

How to Take Part in Local Meetings

This AFSCME publication will help new activists participate in local union meetings. It explains how to use Robert's Rules of Order from the perspective of a meeting participant. Consider making copies available at every local union meeting. To order copies, contact the AFSCME Administrative Services Department at **202-429-1234** or download it here: www.afscme.org/about/governance.

Planning Guide for a Successful Meeting

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

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

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

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

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

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

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

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

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



TURNOUT IS KEY

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

Locals can use a variety of ways to do turnout for meetings, such as leaflets, texts, emails, social media and bulletin board notices. But remember, there is NO substitute for one-on-one conversations for moving people to action. The best way to turn out people for meetings is by word of mouth. Utilize your leadership team, stewards, and MATs in spreading the word about the meeting and getting commitments from members to attend. Refer to pages 22–27 for more information on how to do this successfully.

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

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

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

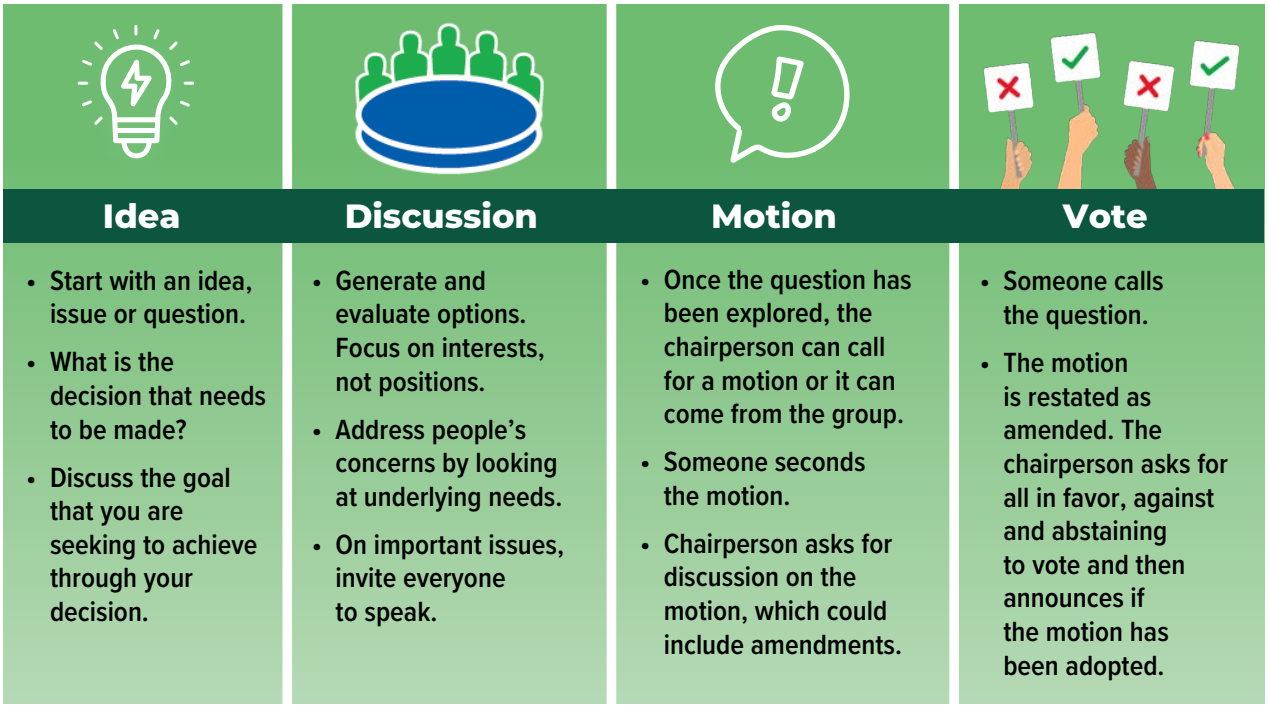
BASIC ELEMENTS OF ROBERT'S RULES

- A motion, calling for the local to take some course of action, is made; sometimes the chairperson may call for a motion. ("Do I hear a motion to ...?")
- The chairperson asks for a second. For a motion to be discussed, it must be seconded.
- The chairperson states the motion and calls for discussion. ("It has been moved and seconded that .... Is there any discussion?")
- When recognized by the chairperson, meeting participants may speak to (discuss) the motion on the floor.
- On occasion, during discussion, an amendment to a motion may be offered from the floor; this, too, requires a second before the chairperson calls for discussion. ("An amendment has been made and seconded that .... Is there any discussion on the amendment?")
- When discussion has run its course or has been ended by vote of meeting participants, the chairperson conducts a vote. ("All those in favor say 'aye.' All those opposed say 'no.'")
- If there is an amendment being discussed, the amendment is voted on first, then the motion as amended if the amendment carries.
- Sometimes a member may raise a procedural "point":
  - on a point of order (example: "The discussion has gotten off the topic of the motion on the floor"), the chairperson makes a ruling ("Your point is well taken, and I remind members to speak to the issue on the floor.")
  - on a point of information or point of clarification, the chairperson can offer clarifying information before discussion continues ("What this would mean is ....")

For more details on conducting meetings, refer to **Appendix F: How to Chair a Meeting.** Locals can order copies of How to Chair a Meeting and How to Participate in a Union Meeting by contacting the AFSCME Administration & Facilities Department at 202-429-1234 or downloading it here afscme.org/about/governance.

COLLABORATIVE DECISION-MAKING USING ROBERT'S RULES OF ORDER

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



SECTION 08

The Structure of AFSCME



AFSCME by the Numbers:

1.4 million *members*

More than 3,700 *local unions and councils*

More than 100 *independent employee associations have affiliated with AFSCME*

AFSCME members come from ***46 states,*** *the District of Columbia and Puerto Rico*

Questions and Answers About AFSCME

WHAT IS AFSCME?

The American Federation of State, County and Municipal Employees (AFSCME), AFL-CIO, is the nation's largest union of people working in public service with 1.4 million members. The ion comprises a large and diverse spectrum of public service workers.

By joining together, AFSCME members build power in the workplace, at the ballot box, in the halls of government and at the bargaining table. AFSCME is a powerful advocate for fairness in the workplace, excellence in public service and opportunity for all working families.

WHO IS IN AFSCME?

AFSCME is the union of people who serve the public every day. Our 1.4 million members provide the vital services that make America happen. We maintain our roads and airports, care for the sick and elderly, keep our schools and universities running, and our communities safe.

AFSCME members make sure the water we drink is pure, the trash is taken away, the streets are clean, the environment is protected and our communities get vital public services. In so many ways, in so many places, each and every member does the important work of our cities and towns, counties and states, schools and libraries, corrections, health and public facilities. AFSCME members work in hundreds of different occupations — from nurses to corrections officers, child care providers to sanitation workers.

WHAT IS A "LOCAL"?

As an AFSCME member, you become part of a local union (also called a local) consisting of the co-workers in your office, institution, department or community. Each local writes its own constitution or bylaws, holds regular membership meetings and elects its own officers and stewards. Some locals are statewide, covering all employees in a statewide bargaining unit, and may have more than 1,000 members. On the other hand, some locals cover employees in a department in a small town and may have only a handful of members. There are approximately 3,500 AFSCME locals.

WHAT IS A "COUNCIL"?

AFSCME local unions within one state, city or county often pool their resources to form a more powerful voice on issues affecting members, called a council. Councils negotiate contracts, handle grievances, arbitrate, educate, provide communications and public relations and work on legislative and political action. Most states have one or more councils or district councils. Some councils represent only state workers in that particular state; some councils represent only city and county workers in a state; and in some states, one council represents all AFSCME members in that state. It varies from state to state.

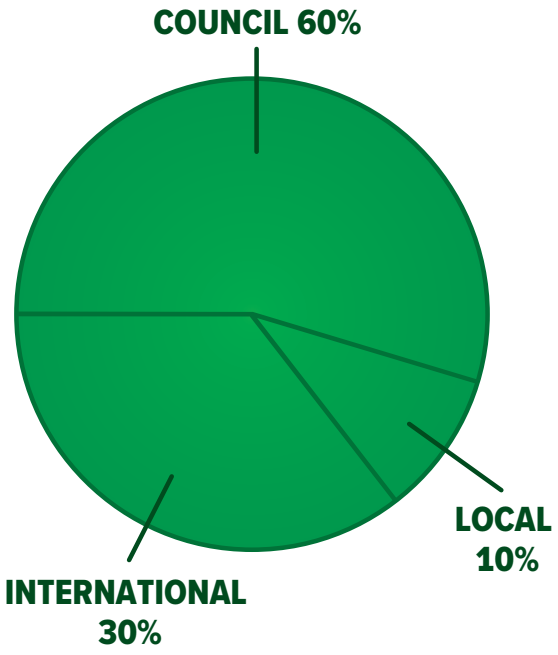
WHAT IS THE AFSCME INTERNATIONAL UNION?

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

- Collective bargaining negotiations
- Communications
- Data and analytics
- Diversity, equity and inclusion programs
- Education for leaders, stewards and activists
- Health and safety
- Interest arbitration
- Legal counsel
- Legislative lobbying
- New Employee Outreach
- Organizing
- Political action
- Policy Advocacy
- Research
- Strategic planning and organizational development
- Training and leadership development
- Workforce development guidance

WHERE DOES A UNION MEMBER'S DUES MONEY GO?

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



WHO RUNS AFSCME?

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

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

Patrick Moran is the President of AFSCME. He was elected in 2026. Moran, a lifelong organizer, previously served as an AFSCME International vice president and president of Maryland Council 3, where he expanded collective bargaining for public service workers, strengthened safety standards and built power by growing membership.

Nicole Pollard was elected Secretary-Treasurer of AFSCME in 2026. Pollard, an AFSCME member for 23 years, previously served as executive assistant to President Emeritus Lee Saunders. Before that, she was an attorney in AFSCME's Office of General Counsel. Pollard made history by becoming the first African American woman to serve as AFSCME's secretary-treasurer.

WHAT IS THE AFSCME LEADERSHIP ACADEMY?

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

The Structure of AFSCME



WHAT IS THE AFL-CIO?

The American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) is the voluntary federation of 63 national and international labor unions, representing nearly 15 million working people.

The mission of the AFL-CIO is to improve the lives of working families by bringing economic justice to the workplace and social justice to our nation. Local unions should affiliate and become active with the AFL-CIO Central Labor Council in their area. Learn more at aflcio.org.

WHAT IS THE DIFFERENCE BETWEEN AFSCME AND THE AFL-CIO?

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

SECTION 09

International Union Resources



The AFSCME International Union, headquartered in Washington, DC, provides resources and expert help to AFSCME councils, locals, and affiliates. Within the International, the work of departments is linked by one common purpose: to help AFSCME, at every level, become a stronger and more effective union. Below is an overview of the International Union's departments and a sampling of the resources provided by each.

To contact a department or staff members of the International Union, please call 202-429-1000.

The **Communications Department** helps AFSCME members tell their stories about how they make their communities safer, healthier, and stronger, as well as the difference being in a union makes to their lives. The department supports all aspects of our union's organizing, political and lobbying efforts. It oversees our union's external communications, including the AFSCME.org website, social media presence, videos, graphics, media relations, executive officer speeches and field communications.

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

International Union Resources

The **Department of Education and Leadership Training** offers skill building and leadership development programs on a wide variety of topics such as steward and officer training, equity and inclusion, strategic planning and organizational development, and more. The department administers the AFSCME Leadership Academy, which provides online, classroom and field training for AFSCME members, staff and leaders.

The **Department of Organizing and Field Services** works directly with councils to assist and augment their efforts, acting as a liaison for problem-solving efforts of all kinds, in addition to supporting affiliates' internal and external organizing programs with staff, organizer training and target research. The department also directly runs large organizing campaigns and administratorships. Much of this work is done through coordination with affiliate AFSCME Strong coordinators and organizing directors. Together, they identify and share best practices. The department also runs the AFSCME Volunteer Member Organizer (VMO) program, which empowers members to run strong organizing initiatives locally and support other campaigns across the country.

The **Department of Research and Collective Bargaining Services** offers assistance to councils and locals in a variety of areas, including contract negotiations, interest arbitration and impasse procedures, health and safety, policy advocacy, new employee outreach, privatization and workforce development guidance.

The **Federal Government Affairs Department** serves as AFSCME's lobbying arm to advocate for issues related to AFSCME members' jobs, their families and their communities. The department represents AFSCME's interests on Capitol Hill and in the executive branch by meeting with members of Congress, their staff, and administration officials to advance AFSCME's federal agenda.

The **Political Action Department** drives our unions' electoral, grassroots and legislative campaigns by engaging members and the general public in key candidate, ballot initiative and issue campaigns. The department also promotes best practices in raising funds for AFSCME PEOPLE, our political action committee. Other key activities include candidate recruitment, polling and research operations, training programs, grassroots lobbying and other strategic initiatives.

The **Retiree Department** works on organizing new retiree chapters and subchapters, helps current chapters and subchapters increase their capacity, and works with retiree leaders to foster their participation in AFSCME's political and legislative advocacy campaigns. The department works on issues affecting retired AFSCME members like Social Security, Medicare, pensions and retiree health insurance.

The **Financial Services Department** provides guidance to locals on financial procedures and compliance with AFSCME's Financial Standards Code and conducts secretary-treasurer training for locals, reviews the financial condition and internal controls of AFSCME's councils and large locals as mandated by AFSCME's Affiliate Audit and Review Program, and advises councils and locals on compliance topics related to the Internal Revenue Service and the Department of Labor, as well as other filing requirements unique to labor unions. See the Secretary-Treasurer Online Resource Center (STORC) at www.afscmetreasurer.org.

The **Office of the General Counsel** provides legal advice to the International Officers, the International Executive Board, the Judicial Panel and Headquarters Departments on a wide variety of legal issues ranging from traditional labor and employment law questions to constitutional issues affecting AFSCME. The General Counsel initiates and defends litigation before federal and state courts and administrative agencies to safeguard the interests of our union.

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

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

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

The **Judicial Panel** is an 11-member body appointed by the International President, with the consent of the International Executive Board. The panel is responsible for handling disputes between members specified by AFSCME's constitution in a manner consistent with trade union principles and without resort to courts. The panel's duties include hearing charges and appeals filed by union members, determining candidate eligibility challenges, ruling on election protests and more.

The **Information Technology Department** is responsible for the cybersecurity and overall technology infrastructure at both headquarters and field operations. Its responsibilities include managing the union's internet connectivity, computing devices, printers, network systems, and various software applications.

The **Administration and Facilities Department** manages the Local Union Supplies and Merchandise Program. This program provides AFSCME councils and locals with various supplies, including forms, publications, membership jewelry and T-shirts. There is no charge for materials that are essential to the performance of the affiliate. Other supplies, such as some publications, stationery, buttons, etc., are offered at minimal cost.

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

SECTION 10

An *AFSCME* History Timeline



AFSCME is Created in Madison, Wisconsin

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

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

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

1936
AFSCME is granted a charter by the AFL; Arnold Zander is elected as AFSCME's first International president. Zander's leadership focused on fighting for job security for civil service workers, decent pensions and health insurance.

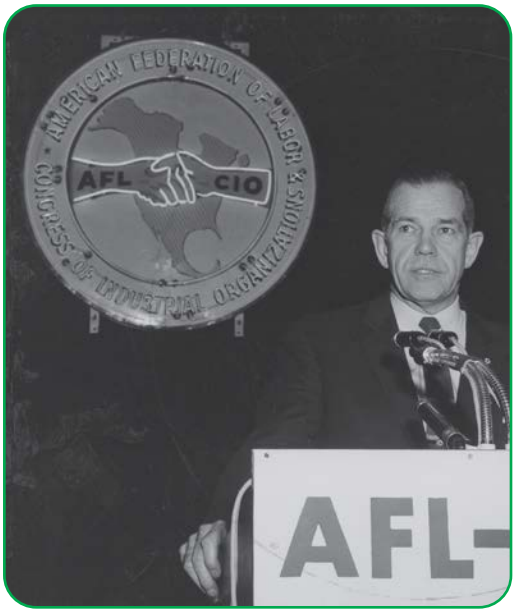
1938
2,000 sanitation workers in Philadelphia go on strike to protest layoffs and pay cuts and win AFSCME's first bargaining agreement with a major city.

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

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

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

Growth and Expansion



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

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

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

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

1965
A special AFSCME Convention rewrites AFSCME's Constitution and includes a Bill of Rights for union members, a first in the American labor movement. By year's end, Wisconsin and Connecticut enact collective bargaining laws for public employees; AFSCME membership reaches 250,000.

AFSCME and the Civil Rights Movement

Mid-1960s
AFSCME's demands for respect for public workers become linked with the civil rights movement and AFSCME joins students and civil rights activists as they take to the streets to protest economic and racial oppression.

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

1968
Sanitation workers in Memphis, Tennessee, strike for union recognition and against the city's discriminatory practices after two workers, Echol Cole and Robert Walker, were crushed to death in a garbage truck; Dr. Martin Luther King Jr. marches with the striking workers and is assassinated; after Dr. King's death, the city agrees to recognize the workers' union, AFSCME Local 1733.

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

1970
Led by Jerry McEntee, Act 195 was passed making Pennsylvania one of the first states in the nation to allow public sector negotiations. Delaware, Hawaii and Pennsylvania enact collective bargaining laws for public employees.



1971
Minnesota and Kansas enact collective bargaining laws for public employees.

1972
William "Bill" Lucy is elected as the first African-American secretary-treasurer of the International union; a lifelong civil rights activist, Lucy worked closely with Dr. Martin Luther King, Jr. in Memphis, Tennessee. He founds the Coalition of Black Trade Unionists (CBTU) and co-founds the Free South Africa Movement.



Power Through Organizing

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

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



Mid-1970s
More than 60 independent employee associations affiliate with AFSCME. Significant affiliations in the early 70s include the Hawaii Government Employees Association (HGEA) and United Public Workers (UPW) in 1971.

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

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

During the 80s, AFSCME won collective bargaining rights for and organized workers in a dozen states. In an era of anti-public worker sentiment, AFSCME greatly increases its political activism and visibility and helps elect AFSCME-endorsed candidates at all levels of government and collective bargaining rights are won in three new states: Illinois, Ohio and Nebraska.

An AFSCME History Timeline

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

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

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

AFSCME Pres. Jerry Wurf dies.

Gerald McEntee is elected as the union's third International president. He began his AFSCME career in 1956 as a member and continued as an organizer and leader in Pennsylvania. Under McEntee's leadership, AFSCME becomes a leading voice for social justice in the country and propels our union's political action and organizing agenda for the decades that followed.



1989
The National Union of Hospital and Health Care Employees (NUHHCE) affiliates with AFSCME and solidifies the union as a leading voice for the rights of health care workers.

1990
AFSCME membership surpasses 1.2 million.

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

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

1995
AFSCME is instrumental in changing the leadership and direction of the national AFL-CIO by endorsing John Sweeney for President.

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

AFSCME in the 21st Century

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

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

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

2006
AFSCME increases its ranks to 1.6 million members.

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

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

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

2007
The union creates a new brand and identity which included the new logo and tagline: We Make America Happen.



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

2009
AFSCME is the top organizing union in the AFL-CIO and plays a major role in getting fiscal relief for states through the American Reinvestment and Recovery Act (ARRA).

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

A Main Street Movement

2010

AFSCME mounts the largest issue mobilization campaign in union history, advocating for health care reform and launching a nationwide bus tour to support the Affordable Healthcare Act (ACA).

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

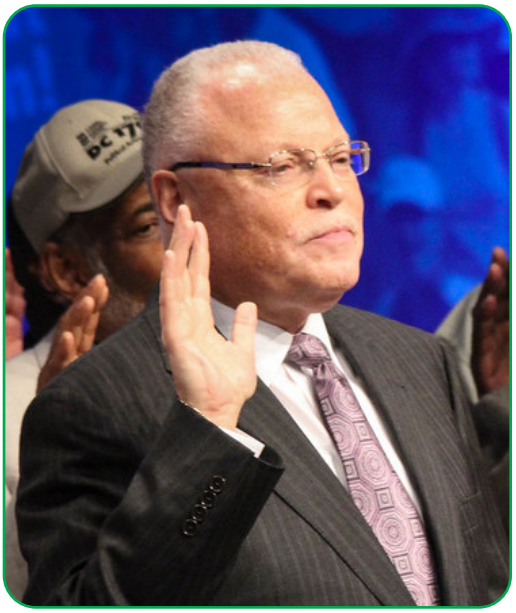
2011

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

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

2012

Lee Saunders is elected president of the International union upon the retirement of Gerald McEntee. Saunders becomes the first African American president of the International Union.



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

2013

AFSCME faces a major challenge when the Freedom Foundation, an anti-worker and anti-union organization, brought forward a legal challenge against union home care workers. The case, Harris v. Quinn, was brought before the U.S. Supreme Court in 2014.

2014

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

2015

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

2016

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



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

2017

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

2018

A decision by the U.S. Supreme Court in Janus v. AFSCME Council 31 overturns decades of precedent and makes the entire public sector an open shop. It was the culmination of a yearslong campaign by anti-worker ideologues to crush our rights and freedoms. But our union's commitment to the AFSCME Strong program allowed us to weather the storm. Because of our steadfast commitment to internal organizing and one-on-one conversations, membership losses were marginal, and we had succeeded in converting more than 100,000 fee payers to dues-paying members since 2015. Despite predictions that Janus would be a death knell, AFSCME emerged with renewed vigor and momentum.

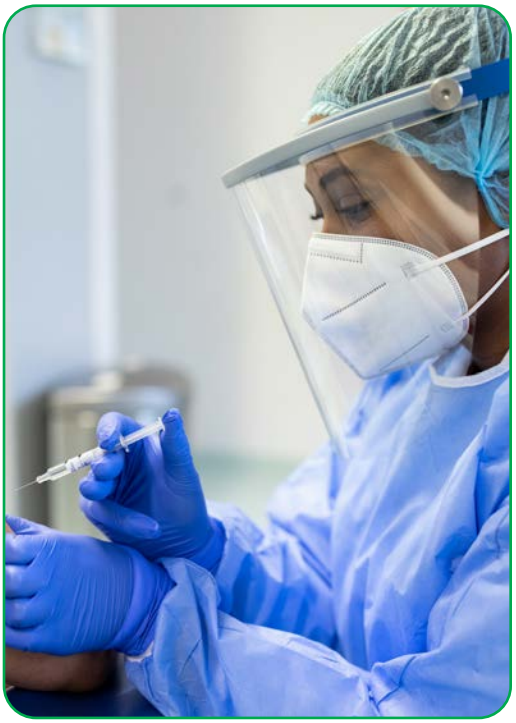
2019

AFSCME's political efforts pay off and we gain new collective bargaining wins across the country. A new law in Nevada empowers state employees with collective bargaining, thanks to the election of a new governor and legislature as part of a 2018 pro-worker wave. In California, family child care providers finally win a voice on the job after several years of organizing.

In Virginia elections, one chamber of the legislature flips to pro-worker control, leading to a new law in early 2020 that lifts a nearly 50-year ban on collective bargaining for local government workers.

2020

The world faces a global pandemic and COVID-19 presents some of our most daunting challenges ever. AFSCME members are on the front lines and we fight hard for Personal Protective Equipment (PPE).



A nationwide quarantine threatens AFSCME members with layoffs and furloughs, as COVID-19 sinks the economy and triggers a revenue crisis in state and local governments. AFSCME launches a campaign called "Fund the Front Lines" to fight for federal aid to restore the public services that are the lifeblood of our communities. It is one of AFSCME's most ambitious grassroots lobbying campaigns, with hundreds of thousands of members contacting members of Congress demanding that they "fund the front lines."

AFSCME members mobilize to elect Joe Biden president of the United States and a new pro-worker U.S. Senate.

2021

AFSCME's call to "Fund the Front Lines" is met, when President Biden signs the American Rescue Plan (ARP), a transformational new law for working people. It invests hundreds of billions of dollars in public services, including $350 billion in direct aid to states, cities, towns and counties and ignites a historic economic recovery. That allows us to negotiate some of our strongest contracts in years.

2023

AFSCME launches a campaign to Staff the Front Lines (STFL) to raise awareness about the public service staffing crisis and to recruit passionate people to apply for jobs in public service. The STFL campaign includes a bus tour that makes stops in 17 cities and turns out more than 2,000 job seekers looking for a career in public service. Six governors, 12 mayors and countless state, city and county employers joined the tour. They sat down with AFSCME members for listening sessions to find solutions and discuss how to better recruit and retain the essential

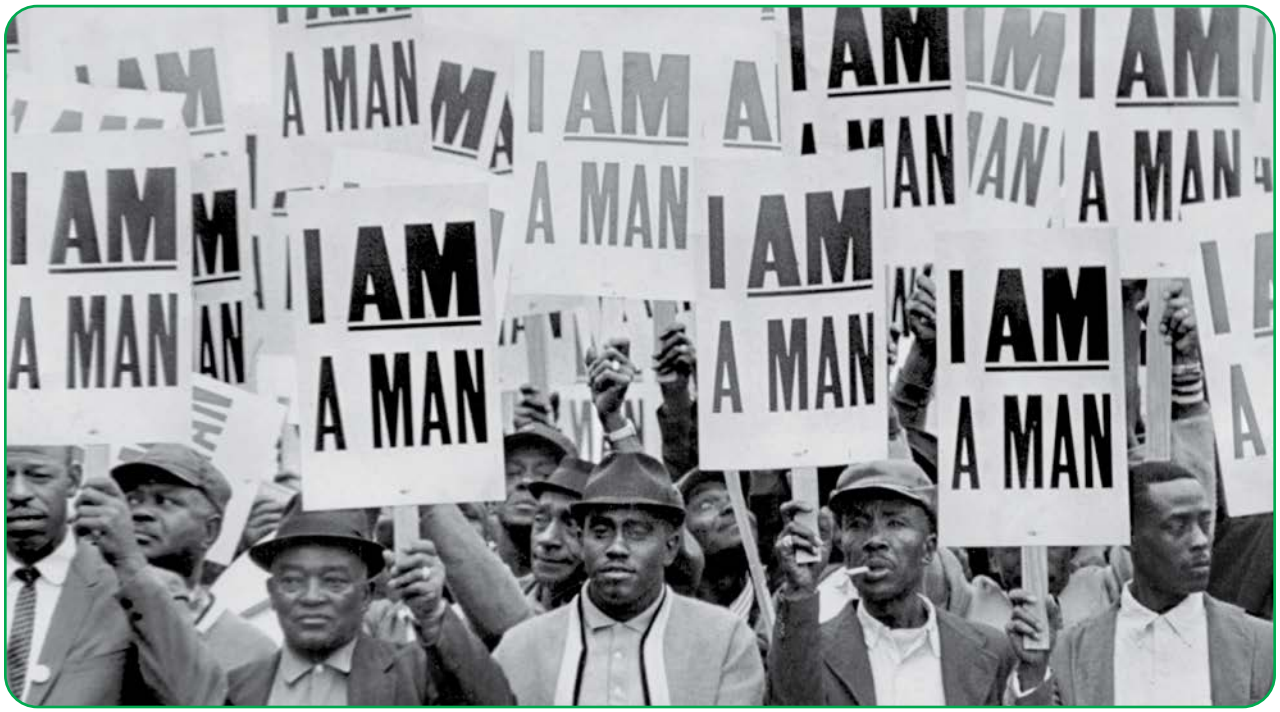
workers needed to keep our communities running. In many stops, AFSCME also partners with state and local leaders to put on job fairs. The campaign concludes with a proactive policy guide including recommendations on how to tackle the staffing crisis in public service, which includes lessons from the bus tour's listening sessions.

2025

AFSCME launches a campaign called AFSCME Get Organized (GO) to fight back against the attacks on AFSCME and public service workers from the White House, the Congressional majority, and anti-union billionaires in Washington D.C. and state governments. The AFSCME GO campaign is a call to action for public service workers and our allies to organize, mobilize, and fight back against those who seek to undermine the vital services that we provide.

2026

In August, thousands of AFSCME members attending the 47th International Convention in Chicago elected new leaders: Patrick Moran as AFSCME International president and Nicole Pollard as AFSCME International secretary-treasurer. They replaced Lee Saunders and Elissa McBride, respectively.



Throughout our history, from our founding era to marching on the streets of Memphis, from organizing campaigns to a pandemic, from the courthouse to the White House, AFSCME members have proven time and time again that they will ***NEVER QUIT.***

APPENDICES

APPENDIX A

Sample Local Monthly Financial Report

Note: This is a minimal report that meets the requirements of the Constitution. Locals that have the capacity are encouraged to prepare more detailed financial reports.

AFSCME LOCAL _____
MONTHLY FINANCIAL REPORT

Statement of Receipts and Disbursements
For the Month Ending February 28, YYYY

RECEIPTS	
Dues Rebate	$2,000
Interest Income	$20
Other Income- Fundraiser	$350
Total Receipts	$2,370
DISBURSEMENTS	
Rent	$400
Utilities	$180
Mileage	$560
Postage/Newsletter	$435
Per Diem	$552
Total Disbursements	$2,127
Excess (Deficit) Receipts Over (Under) Disbursements	$243

Reconciled Cash Balances

Unionville National Bank Account No. 1234-5678	$15,243
Money Market Fund	$10,000
Total Cash Assets	$25,243

Schedule of Unpaid Obligations
As of February 28, YYYY

NAME/VENDOR	DATE OF INVOICE	AMOUNT
Zap Electric Co.	February 28, YYYY	$100
Union Bell	February 28, YYYY	$80
Total Unpaid Obligations		$180

APPENDIX B

Sample Local Meeting Minutes

Minutes of the meeting of April 12, YYYY.

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

1. Roll call of officers was taken by Recording Secretary Lou Westover. All officers were present.
2. The minutes of the previous meeting were distributed, read, amended as necessary and approved.
3. The president asked the recording secretary to read the local's correspondence. Letters were read from the committee on political education asking for participation in the voter registration drive and from the council president concerning the upcoming Education Conference.
4. Reports of the Officers:
   - The president reported on the Executive Board meeting held on April 5, YYYY. It was moved by Jack Ely, seconded and carried that the report be accepted.
   - Secretary-Treasurer Rudy Martinez distributed and reviewed the monthly financial report for March (a copy is attached). After questions and discussion, it was moved by Arlene Smith, seconded and carried that the report be accepted.
5. Committee Reports:
   - Organizing Committee. Chairperson Leroy Gordon reported that 22 new members had been signed up in March.
   - Steward Committee. Vice President Mary Weiss reported that a group grievance was being filed over the recent change in the dress code.
   - Women's Rights Committee. Chairperson Veronica Chin reported that the committee was conducting a survey to gather information on the concerns of women members.

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

6. Unfinished Business:

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

7. New Business:

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

8. Good and Welfare:

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

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

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

APPENDIX C

Glossary of Labor Terms

ACCRETION

A process for adding unrepresented employees (nonunion) in a unionized workplace when those nonunion positions have the same work duties, essential functions or do work that has historically been done by union employees. Unions can file clarification or amendment petitions to add these positions without having to go through an election process. States have different processes depending on the state labor law.

AGENCY SHOP

A clause that some states permit in private sector collective bargaining agreements. The provision requires all employees covered by the contract to pay either union dues or an equivalent amount in "fair share" fees so that the costs of the union's representation are equally borne by all who benefit. These provisions are not permitted in so-called "right to work" states and have not been permitted in the public sector since the Supreme Court's 2018 decision in Janus v. AFSCME Council 31.

AFL-CIO

The American Federation of Labor-Congress of Industrial Organizations (AFL-CIO), the voluntary federation of America's unions, representing nearly 15 million American workers. The AFL-CIO was formed in 1955 by the merger of the American Federation of Labor and the Congress of Industrial Organizations.

ARBITRATION

See "Grievance Arbitration" and "Interest Arbitration."

ATTRITION

Reduction in the labor force through conditions such as voluntary resignations or retirements, as opposed to layoffs.

BARGAINING RIGHTS

These rights are usually outlined by law, ordinance, or in some circumstances by executive order for public employees because they are excluded from the National Labor Relations Act. Private sector employees have rights outlined in Section 7 of the National Labor Relations Act. These are the rights of workers to negotiate the terms and conditions of employment through chosen representatives.

BARGAINING UNIT

A group of workers who bargain collectively with the employer. The unit may include all the workers in a single location or in a number of locations, or it may include only the workers in a single craft or department. The final unit is determined by the appropriate labor authority or agreed to jointly by the union and the employer.

CARD CHECK

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

CERTIFICATION

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

COLLECTIVE BARGAINING

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

COLLECTIVE BARGAINING AGREEMENT, OR CONTRACT

A formal written agreement over wages, hours and conditions of employment entered into by an employer and the union representing the employees in the bargaining unit. Sometimes these are also referred to as a Memorandum of Understanding.

COST OF LIVING ADJUSTMENT (COLA)

A clause in union contracts that provides automatic wage increases to cover the rising cost of living due to inflation, usually pegged to the national Consumer Price Index and calibrated to kick in only if the inflation rate rises beyond a certain percentage. Often confused with an annual wage increase.

DECERTIFICATION

Withdrawal -- by an official labor authority -- of the certification of a union if a majority of employees vote against union representation in a decertification election.

DISCRIMINATION

The unequal treatment of workers because of race, gender, age, religion, disability, marital status, sexual orientation, nationality, union membership or union activity, political affiliation, or some other unfair basis. Discrimination may occur in hiring, types of jobs given, rates of pay, promotions and transfers, layoffs or other areas. Some employee classes are protected by law while protection for others is negotiated.

DOL

Department of Labor.

DUTY OF FAIR REPRESENTATION

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

EQUAL EMPLOYMENT OPPORTUNITY COMMISSION (EEOC)

Federal government agency that administers most discrimination lawsuits.

EMPLOYEE ASSISTANCE PROGRAM (EAP)

A confidential information, support and referral service designed to help employees cope with personal problems that have a negative impact on their lives and, subsequently, on their work productivity. Deteriorating job performance can lead to an employer taking disciplinary action. Such programs often provide assistance in such situations as emotional stress, marital and family problems, financial and legal difficulties, and drug or alcohol abuse.

Glossary of Labor Terms

EXCLUSIVE REPRESENTATIVE

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

FAIR LABOR STANDARDS ACT (FLSA)

A 1938 federal law that established a minimum wage and overtime pay requirements.

FREE RIDER

An employee who fails to join the union that has negotiated the contract over their wages and working conditions, all the while benefiting from that contract.

FRINGE BENEFITS

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

GRIEVANCE

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

GRIEVANCE ARBITRATION

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

INTEREST ARBITRATION

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

LABOR BOARD

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

MEMBER ACTION TEAM (MAT)

A communication and mobilization network within the workplace.

MEMBERSHIP CARDS

A card authorizing the union as the collective bargaining agent and authorizing dues deduction.

NATIONAL LABOR RELATIONS ACT (NLRA)

Federal law guaranteeing private sector workers the right to participate in unions without management reprisals.

OPEN SHOP

Where employees do not have to belong to the union or pay dues to secure or retain benefits even though there may be a collective bargaining agreement.

OUTSOURCING (CONTRACTING OUT/SUBCONTRACTING)

An employer's practice of having work performed by an outside contractor and not by regular employees in the bargaining unit.

PAY EQUITY

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

PICKETING

Workers carrying signs and patrolling to protest working conditions or actions taken by the employer, or in support of a strike to persuade other employees not to work. Picketing can also be "informational" and might include distributing leaflets; in this case, the purpose is to inform the public of the labor dispute or poor working conditions. The purpose of the tactic is to put pressure on the employer by informing the public and other workers about unfair working conditions.

RANK-AND-FILE

The members of your union.

RATIFICATION

Formal approval of a newly negotiated agreement by vote of the union members affected.

REPRESENTATION ELECTION

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

"RIGHT-TO-WORK" STATES

States that have passed laws mandating open shops in the private sector and which prohibit unions from negotiating agency shop clauses in their contracts with employers.

SCAB

Someone who takes a striking worker's job or refuses to go on strike with co-workers. By filling the jobs of striking workers and keeping the employer operational, scabs may weaken or help break the strike.

SENIORITY

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

SERVICE FEE

In the private sector, a monetary assessment of nonmembers in a bargaining unit to help defray the union's costs in negotiating and administering the contract (see Agency Shop). Also referred to as a "fair share" fee.

Glossary of Labor Terms

STRIKE

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

TAFT-HARTLEY (LABOR MANAGEMENT RELATIONS ACT)

An amendment of the NLRA that added provisions allowing unions to be prosecuted for a variety of activities, such as secondary picketing.

UNFAIR LABOR PRACTICE

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

WEINGARTEN RIGHTS

The rights of employees covered by the NLRA to request union representation during investigatory interviews if they reasonably believe that the interview could result in discipline. Weingarten rights also guarantee the rights of union representatives to assist and counsel employees during interviews that could lead to discipline.



APPENDIX D

A Union Leader's Bookshelf

and Other Resources

Here is a list of resources that can help you do the important work you do in your union. All of these resources are downloadable from AFSCME's website (www.afscme.org/about/governance) unless otherwise noted.

- AFSCME International Constitution
- Your local's (or chapter) constitution (available from your council or affiliate)
- AFSCME Financial Standards Code (www.afscmetreasurer.org)
- AFSCME Local Union Election Manual
- How to Chair a Meeting
- How to Take Part in Local Meetings

AFSCME STEWARDS HANDBOOK

Stewards are the cornerstone of our union, and effective stewards build stronger unions. This handbook will help you strengthen your skills and confidence in all the vital roles stewards play -- representatives, organizers, communicators and leaders. (www.afscme.org/member-resources/education-training/publications-and-resources)

THE AFSCME ONLINE LEADERSHIP ACADEMY

Whether you're a dedicated union member, a steward, or a local leader, this cutting-edge platform is designed to empower you with the knowledge and skills needed to make a real impact in your community and workplace.

Getting started is easy! Simply visit education.afscme.org and sign up for the AFSCME Online Leadership Academy. Once you're in, you'll have access to a treasure trove of resources and courses designed to enhance your steward and leadership abilities.

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

- Five books by Robert Schwartz: *The Legal Rights of Union Stewards, Just Cause, How to Win Past Practice Grievances, The FMLA Handbook,* and *No Contract, No Peace.* All are written in an easy-to-read, question-and-answer format and cover all the bases on their respective topics. Available at labornotes.org/store/books/work-rights-press.
- *The Union Steward's Complete Guide,* edited by David Prosten. Topics range from the basics of grievance handling to dealing with difficult supervisors to increasing member involvement in your union in a changing workplace. Available from davidprostenbooks.com.

APPENDIX D

A Union Leader's Bookshelf and Other Resources

- *The Union Member's Complete Guide,* by Michael Mauer. This guide offers an easy-to-read, thorough explanation of what unions are, how they work, and the rights and responsibilities of union members. Available at laborsbookstore.com
- *Secrets of a Successful Organizer* by Alexandra Bradbury, Mark Brenner, and Jane Slaughter. A step-by-step guide to building power in your workplace. You'll learn how to identify the key issues in your workplace, build campaigns to tackle them, anticipate management's tricks and traps, and inspire your co-workers to stand together despite their fears. Also in Spanish. Available at labornotes.org/secrets
- *Organizing for Social Change, 4th edition,* by Kim Bobo, Jackie Kendall and Steve Max. A comprehensive tool for organizers and leaders determined to create change, it covers everything from coalition building to using the media. Published by the Midwest Academy and available for purchase from organizingforsocialchange.com.
- *Parliamentary Procedure and Effective Meetings,* by Gene Daniels and Larry Casey. Designed as a workbook, this realistic guide on how to run and participate in union meetings offers real-world advice on setting agendas, dealing with difficult people and boosting attendance. Available from laborsbookstore.com.
- *Robert's Rules of Order.* This book covers parliamentary procedure from A to Z. Available at all major bookstores.



WEBSITES

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

- Up-to-date information on political, legislative, and policy issues that affect AFSCME members.
- News about AFSCME organizing victories around the country.
- Bargaining topics and data.
- Upcoming International Executive Board meetings, conventions, and governance documents.
- Links to other websites useful to AFSCME activists, including:
  - AFSCME councils and locals
  - other labor unions and organizations
  - government agencies
  - resources organized by topics that include member benefits, bargaining, privatization, retirees, health and safety, etc.
- There are a growing number of union-related websites on the Internet. In addition to the AFSCME home page afscme.org, other useful sites include:
  - aflcio.org: Up-to-date news, information, publications and more from the AFL-CIO.
  - unionstats.com: Private and public sector labor union membership, coverage and density estimates (1973-present) compiled by the Census for the Bureau of Labor Statistics.
  - faireconomy.org: The site of United for a Fair Economy, a network of progressive economists that strives for greater economic equity.
  - laborheritage.org: The site of the Labor Heritage Foundation, which works to strengthen the labor movement through music and the arts.

APPENDIX E

Sample Orientation and New Members Kits

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

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

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

- Information about AFSCME
- Letter from the local president
- History of the local and summary of the latest victories
- Information on negotiated benefits
- Contract or work rules
- Membership card and PEOPLE card
- Information on AFSCME Advantage "member only" benefits.

Here's a pro-tip: It's always best to talk with the new employees about the difference your union makes and ask them to join BEFORE giving them the kit. Simply give them the card and a pen and after they sign, you can review the other items in the packet. If you distribute the packet first, new employees sometimes say they want to read it all before joining … and, unfortunately, they often misplace the packet and forget to join. Joining their union is important, so you want to sign them up on day one. Simply talk with them, share the difference your union has made in the workplace and ask them to join!

After new employees join your union, you should provide them with a welcome kit that includes additional information such as:

- Welcome letter from the local president
- Contract or work rules
- Local constitution
- Local and council newsletter
- List of local officers and stewards, including a phone number and email for each person (and pictures are an added value!)
- PEOPLE information
- Information on AFSCME Advantage "member only" benefits
- EAP (Employee Assistance Program) information
- AFSCME buttons and bumper stickers
- Membership meeting schedule and information
- List of committees and points of contact.



Resource Alert

If you'd like to explore ways to strengthen your local's **New Employee Outreach (NEO),** ask your staff rep or council about the NEO Toolkit or contact the Research and Collective Bargaining Department or Education Department.

APPENDIX F

How to Chair a Meeting

1 Call to Order

Start Your Meeting on Time.

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

2 Roll Call of Officers

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

- Sometimes an amendment to the motion on the floor may be offered. An amendment must be seconded and then discussed. The Chair should say: **"An amendment has been made and seconded that ... Is there any discussion on the amendment?"** A vote is first taken on the amendment. After the amendment is decided on, the discussion returns to the main motion (as amended if the amendment was passed). A vote is then taken on the main motion.
- During a discussion of a motion or amendment, make sure that each member speaks only once until all other members have had an opportunity to speak. It is a good idea to alternate speakers for and against the motion. If members begin responding to and addressing remarks to each other, remind the group that all comments should be addressed to the Chair. The discussion and debate are for the group as a whole to participate in. It is not an argument between a couple of members.
- A member may raise a **"Point of Information."** For instance, he or she might state: **"Point of Information. I don't understand the intent of this motion."** The Chair should then clarify the intent of the motion or provide the information being requested. You may have to remind the member that a point of information is a question, not a statement.
- Sometimes a member may rise on a **"Point of Order,"** saying something like: **"Point of Order. This discussion does not pertain to the motion on the floor."** The Chair should make a ruling and say something like: **"Your point is well-taken and I direct the member speaking to address the motion on the floor."**
- There are times when discussion on a topic begins but no motion has been made. In this instance, the Chair may call for a motion by saying, **"Does the Chair hear a motion to ...?"** Of course, this motion must be seconded and the Chair should restate the motion before asking if there is discussion.

3 Reading of Minutes

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

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

4 Reading of Correspondence

The Chair says: **"The Recording Secretary will now read the correspondence."** The Recording Secretary should then read any important correspondence, summarizing the content when appropriate.

Any letter requiring action by the membership should be discussed by the Executive Board prior to the membership meeting. At the membership meeting, the letter should be read along with the recommendations of the board. A motion should be made to adopt the board's recommended action. That motion should then be discussed and voted on by the members. Routine letters should not be taken up at the membership meeting.

5 Reports of Officers

The President's Report might include such topics as:

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

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

How to Chair a Meeting

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

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

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

6 Reports of Staff and Committees

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

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

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

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

7 Unfinished Business

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

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

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

8 New Business

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

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

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

9 Good and Welfare

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

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

10 Adjournment

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

"Do I hear a motion to adjourn?"

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

How to Chair a Meeting

Some Additional Notes for the Chairperson

- The Chair should make sure that all reports given at the meeting are brief and to the point. This will help keep the whole meeting short. People are more likely to attend meetings that are run efficiently and end on time!
- When a motion is made, it must be seconded. The Chair should then state the motion and call for discussion: **"It has been moved and seconded that ... Is there any discussion?"**
- Sometimes an amendment to the motion on the floor may be offered. An amendment must be seconded and then discussed. The Chair should say: **"An amendment has been made and seconded that ... Is there any discussion on the amendment?"** A vote is first taken on the amendment. After the amendment is decided on, the discussion returns to the main motion (as amended if the amendment was passed). A vote is then taken on the main motion.
- During a discussion of a motion or amendment, make sure that each member speaks only once until all other members have had an opportunity to speak. It is a good idea to alternate speakers for and against the motion. If members begin responding to and addressing remarks to each other, remind the group that all comments should be addressed to the Chair. The discussion and debate is for the group as a whole to participate in. It is not an argument between a couple of members.
- A member may raise a **"Point of Information."** For instance, he or she might state: **"Point of Information. I don't understand the intent of this motion."** The Chair should then clarify the intent of the motion or provide the information being requested. You may have to remind the member that a point of information is a question, not a statement.
- Sometimes a member may rise on a **"Point of Order,"** saying something like: **"Point of Order. This discussion does not pertain to the motion on the floor."** The Chair should make a ruling and say something like: **"Your point is well-taken and I direct the member speaking to address the motion on the floor."**
- There are times when discussion on a topic begins but no motion has been made. In this instance, the Chair may call for a motion by saying, **"Does the Chair hear a motion to ...?"** Of course, this motion must be seconded and the Chair should re-state the motion before asking if there is discussion.

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

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

Conducting Meetings Online

Although union leaders had been occasionally conducting Executive Board and membership meetings via conference calls for some time, the pandemic required unions to up their game to maintain operations during a time when in-person meetings weren't possible. Various online tools were tested with a consensus forming around **Zoom.**

Conducting "virtual" meetings has a lot in common with in-person meetings. Agenda planning and notice to attendees is still paramount, but additional assistance is needed for some who may not be familiar with using these tools and some aspects of meetings are conducted a little differently **(voting, for instance)**.

When sending out the meeting notice, be sure to include clear instructions on how to access the meeting and identify the equipment needed **(computer with microphone and speakers, smartphone, or tablet)**. Offer a contact person who can help walk people through the setup process beforehand.

By now, many people are familiar with the various features of Zoom such as muting/unmuting audio, turning the camera on/off **(encourage cameras on)**, hand raising, and chatting, but offer some instruction at the beginning of the meeting **(or, at least, ask if anyone needs instruction)** if you intend to use these features.

All meetings held using Zoom should be recorded **(announce that the meeting is being recorded)**. Anyone who does not consent to being recorded should leave the meeting. If votes are taken, you must keep a record of those as part of the permanent record, maintained by the appropriate officer of the body. Participants' identities must be verified and only members should be allowed to vote. **Make sure participants show their first and last names.**

How to Chair a Meeting

Robert's Rules of Order Chart of Motions & Procedures

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

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

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

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

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

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

APPENDIX G

Local Union Equity Checklist

The Local Union Equity Checklist allows for examination of policies, practices, and bargaining procedures to ensure that our union's commitment to diversity and inclusion continues.

Local Union Commitment, Leadership & Governance

Does your organization have a mission statement that incorporates racial equity? Has your local communicated this mission and made the commitment to equity clear?	☐ Yes	☐ No
Does your organization have an internal structure whose goal is to address issues of racial equity, for example an Equity and Inclusion Committee?	☐ Yes	☐ No
Do you collect the racial, ethnic, and linguistic makeup of your Executive Board, stewards, committees, and/or members in general? If so, at what levels and what information do you collect?	☐ Yes	☐ No

Union Culture, Practices, and Communications

Does your local have a code of conduct or harassment policy?	☐ Yes	☐ No
Does your local visibly post materials in several languages or provide interpreter/translator services for people who speak languages other than English?	☐ Yes	☐ No
Does your local utilize vendors owned by people from marginalized communities?	☐ Yes	☐ No

Equity in Bargaining and the Workplace

Does your contract or MOU have a non-discrimination clause? Article _____, Section _____. Does it cover all the grounds listed under federal, state, and local law? Does it provide protections from discrimination on grounds not covered under legislation (such as sexual orientation or gender identity)?	☐ Yes	☐ No
Does the definition of "spouse" or "family" include same-sex partners and their children?	☐ Yes	☐ No
Are women or workers of color clustered in certain jobs? Are those the least-safe jobs? Are those lower-paid jobs?	☐ Yes	☐ No
Are there disparities in discipline? Are workers of color held to a different standard when guilty of violating a work rule?	☐ Yes	☐ No

APPENDIX H

Building PEOPLE Power

PEOPLE stands for Public Employees Organized to Promote Legislative Equality.



It is our union's political action committee, funded entirely by members' voluntary contributions. Because federal election law and some state laws prohibit using union dues for campaign contributions, AFSCME members joined together and created PEOPLE to help fight for working families.

With PEOPLE power, we make our voices heard on issues that affect workers at every level of government, from the school board to the city council, from the state legislature to the U.S. Congress. PEOPLE helps elect candidates and promote causes that support working families. We win victories on matters important to AFSCME members, such as legislation affecting working conditions for public service employees. Member contributions pay for everything a campaign needs to be successful, from phone banks to flyers, from rally signs to media campaigns.

Public service employees are affected by politics more than any other group of workers. As public service workers, AFSCME members are in a unique position to elect their bosses and PEOPLE enables our union to be strong politically as well as enact legislative programs that protect the vital services we provide to our communities. By contributing to AFSCME PEOPLE, you can be involved and have a direct impact on the political process and elect the people who represent you.

Building PEOPLE Power

New employee outreach events and worksites have proven to be the optimal places to recruit PEOPLE contributors. As the first point of contact at the worksite, stewards are the best ambassadors of the PEOPLE program, with the unique ability to relate to on-the-job issues. Recruiting for PEOPLE is a crucial part of your role as an AFSCME steward. However, some state and local laws restrict when and where public employees may make political solicitations, so be sure you are familiar with any restrictions that may apply.

Below are a few things you need to know in order to recruit more PEOPLE contributors.

PEOPLE Sign-up Is Easy

- Payroll deduction — easiest and most reliable!
- Credit card, debit, bank account — monthly recurring contributions.
- Cash, check or money order.
- Sign up on our PEOPLE website using your phone's camera.

AFSCME.org/people

Please check with your local union leadership to determine which method makes sense for your local, to get the appropriate forms and to find out where to submit your new sign-ups.

WHO CAN GIVE

AFSCME PEOPLE can only accept contributions from AFSCME members, AFSCME staff, retirees and their families.

How can stewards help grow the PEOPLE Program?

- Keep a list and let members know about legislative and political victories and explain that PEOPLE makes those victories possible.
- Ask new employees to join PEOPLE at the same time they join our union
- Always keep PEOPLE sign-up cards on hand and be ready to answer questions about the program.
- Host lunch-and-learn programs and "AFSCME Days" to promote and encourage new MVP sign-ups.
- Do not be afraid of rejection. You're going to be impressed by the number of members willing to sign up.

AFSCME PEOPLE

The AFSCME Online Leadership Academy

The AFSCME Online Leadership Academy (OLA), hosted on AFSCME Labor Lab, is your hub for self-paced courses, live webinars, and interactive learning communities designed to support members, leaders, activists, and staff.

HOW TO REGISTER & GET STARTED

1. **Visit Labor Lab:** education.afscme.org
2. **Create a New Account**
3. **Browse & Subscribe to Trainings**
4. **Join Learning Communities:** Log in, click the Communities tab, and explore immigration modules and other collaborative spaces.

WHY USE OLA?

- **Learn at your own pace** – anytime, anywhere.
- **Stay connected** through interactive communities.
- **Strengthen leadership skills** and union-building strategies.
- **Access bilingual content** in both English and Spanish.

QUESTIONS?

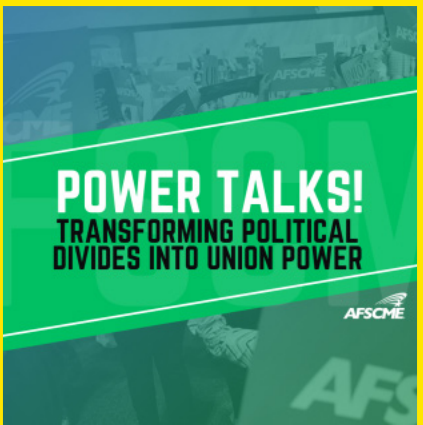
Contact us at 202-429-1256 or OLAhelpdesk@afscme.org.












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Washington, D.C. 20036
AFSCME.org

Officer Handbook
2026 Edition

409-26 produced by AFSCME Union Labor