



Policies and Procedures

A.F.S.C.M.E LOCAL 2067

City of Salem

Local 2067 Executive Board
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Review annually each July

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SECTION 1
AFFILIATIONS

Oregon A.F.S.C.M.E Council 75
A.F.S.C.M.E International
AFL-CIO

A.F.S.C.M.E Local 2067 will continue to be a dues-paying member of the above affiliations as mandated in Local 2067 and the International Constitution.

Ethics:

No Officer or Member of the Local shall use their position or affiliation for personal gain. This Local will make every effort to be union friendly (using Union made products whenever possible).

SECTION 2
GOVERNING BODY

Local 2067 Governing Body shall consist of Officers / Executive Board members of which seven are voting members:

- President (authorized signatory)
- Vice President / Chief Steward (authorized signatory)
- Secretary (authorized signatory)
- Treasurer (authorized signatory)
- Three Executive Board Members
- Sergeant at Arms (attend meetings as non-voting members)
- Three Trustees (attend meetings as non-voting members)
- *See A.F.S.C.M.E Financial Standards Code Article 11, section 1
- Communication/Technology Specialist (attend meetings as a non-voting member)
- Technology Specialist (attend meetings as a non-voting member)

The Executive Board is responsible for upholding the Policies and Procedures of Local 2067. The Executive Board shall be the governing body of Local 2067 except when local membership meetings are in session.

No Officer, Steward or Council Representative will sign or make any binding agreements affecting the contract or local without Executive Board approval. Once board has approved any agreement it must be signed by a minimum of 2 of the 3 following people: President, Vice president, council rep.

Union Stewards:

The number of Stewards, at any given time will be the decision of the Executive Board. Their decision will be based upon current needs and budgetary restrictions. See Union steward Policy for more information.

Officer terms of office:

- President** - Two year term (even number years)
- Vice President** -Two year term (odd number years)
- Secretary** -Two year term (odd number years)
- Treasurer** - Two year term (even number years)
- Sergeant at Arms** -Two year term (even number years)

Executive Board members:

- Elected to three year term (2015 – 2018)
- Elected to three year term (2016 – 2019)
- Elected to three year term (2017 – 2020)

Trustees:

- Elected to three year term (2015 – 2018)
- Elected to three year term (2016 – 2019)
- Elected to three year term (2017 – 2020)

The Executive Board shall give 15 days notice prior to nominations held at the March and April membership meetings for officers; the Elections Committee will prepare ballot(s) and necessary supplies including active membership list from City of Salem Human Resources office in May; no other action is taken during May other than to mail out the ballots to the membership; ballots are returned to Council 75 office when the Elections are held in June; Officers will take the oath of office at the first Executive Board meeting held in July. In cases where there are no contested election, ballots will not be mailed out.

Officers / Stewards Compensation:

Effective August 8, 2014, A.F.S.C.M.E Local 2067 shall increase the current disbursement policy of allotting funds for the following paid positions. (*Disbursements to be paid monthly*)

President	\$325.00
Vice President (Chief Steward)	\$300.00
Secretary	\$175.00
Treasurer	\$275.00
Union steward	\$125.00
Executive Board Member	\$100.00
Trustee	\$100.00
Sergeant At Arms	\$75.00
Communication Specialist (appointed office)	\$100.00
C.A.T. Team	\$50.00

OFFICER RESPONSIBILITIES

President:

A.F.S.C.M.E. Local 2067 constitution lists the duties of the President:

The President shall:

1. Preside at all membership and Executive Board meetings of Local 2067.
2. Be a “member” of all committees except the election committee (attendance at every committee meeting is not required).
3. Co-sign checks drawn against the funds of the Local, except those issued to self. Ensure all expenditures have been approved by the membership or has had advanced Executive Board authorization.
4. Appoint all standing committees and all special committees of the Local, subject to the approval of the Executive Board.
5. Report semi annually to the membership regarding the progress and standing of the Local and regarding the President’s official acts, more frequently during bargaining years.
6. Be the ceremonial officer who presides at union initiations, installations and on other occasions.
7. Listen to every member who has a union related concern.
8. Be a publicist and a negotiator (may even be the Chief Negotiator during contract bargaining).
9. Be a community leader.
10. Strive to be skilled in bringing people together for a common purpose.
11. Make an effort to speak with new employees within their work group as soon as possible.
12. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
13. Be among the first to mobilize the membership when the need arises.
14. Be among the first to speak out in defense of the union / contract and support internal organizing.
15. When extended absences of Officers / Stewards occur, the President shall notify City Human Resources Dept. in writing who will be acting in capacity and for what dates.
16. Review and approve all publications prior to release for print.

Vice President / Chief Steward:

The Vice President shall:

1. Assist the President in the work of the President’s office.
2. In the absence of the President or the Presidents inability to serve, preside at all meetings and perform all duties otherwise performed by the President.
3. Upon approval by the Locals Executive Board, be authorized to act as co-signer of checks drawn on the Locals funds in place of the President, Treasurer or Secretary, except those issued to self.
4. Make an effort to speak with new employees within their work group as soon as possible.
5. Attend all Membership and Executive Board meetings.

The Chief Steward shall:

1. Preside at all Steward Council meetings.
2. Provide minutes to secretary.
3. Maintain a record of all grievances filed and track their progress.
4. Provide a discretionary report to the membership monthly (excluding confidential information).
5. Be responsible for scheduling Steward training and maintaining a record of all training completed by Stewards.
6. Be available to assist or direct Stewards in need of guidance.
7. Be required to answer and respond to calls on the Union cell phone within reason.
8. If applicable: Verify monthly (by check of billing) that the Union cell phones are used for Union business only.
9. Notify the Local President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.
10. In cases of extended absence, the Chief Steward shall appoint one of the Union stewards to act in capacity with all responsibilities of the Chief Steward.
11. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
12. Make an effort to speak with new employees within their work group as soon as possible.
13. Be among the first to mobilize the membership when the need arises.
14. Be among the first to speak out in defense of the union / contract and support internal organizing.

Treasurer:

The Treasurer shall:

1. Receive and receipt all monies of Local 2067.
2. Deposit all monies received in the name of Local 2067 in a bank or banks selected by the Executive Board, and money so deposited, shall be withdrawn only by check. Any transfer of funds shall be conducted through the Treasurer and one other signatory.
3. Prepare and sign checks for such purposes as required by the constitution and are authorized by the Membership or the Executive Board, except those issued to self.
4. Attend all Membership and Executive Board meetings.
5. Maintain an accurate record of receipts and disbursements and shall, once each month, submit to the membership a monthly operating statement of the financial transactions of the local for the previous month.
6. Maintain the records of all properties belonging to Local 2067.
7. Obtain a surety bond from the International Treasurer for an amount to be fixed by A.F.S.C.M.E International.
8. Attend Financial Standards workshop annually.
9. Maintain the minimum standards for keeping of Local 2067 financial records as stated in the International Financial Standards Code. * See A.F.S.C.M.E Financial Standards Code
10. Assure all financial reports required by A.F.S.C.M.E International Constitution, State or Federal agencies are submitted as required and in a timely manner.
11. Make available to the three Trustees, all necessary financial documentation needed to perform the required audits and reports of the local's financial records.

12. Work with the Budget Committee to maintain an annual budget for the Local. This budget will be established by November for the following operating year.
13. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
14. Make an effort to speak with new employees within their work group as soon as possible.
15. Be among the first to mobilize the membership when the need arises.
16. Be among the first to speak out in defense of the union / contract and support internal organizing.
17. Notify the Local President/Vice-President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.

Treasurer Records

1. Treasurer will maintain (in order) and protect all records of financial transactions.
2. All financial records and standards shall be open to review by members upon reasonable notice.
3. Financial records must be kept in an organized detailed manner by the Treasurer throughout their term and transferred complete to their successor at the end of their official term.
4. As required by A.F.S.C.M.E International Financial Standards, all records needed for reports shall be copied by disk or photocopier and provided to the Senior Trustee prior to each audit (or as needed).
5. Archived records shall be destroyed as per Internal Revenue Service standards.

Secretary:

The Secretary shall:

1. Keep a record of the proceedings of all membership meetings, all Executive Board meetings and committee meetings. Maintain a brief summary (minutes) of what is said at each meeting (who presided and who was present) and what motions were made, who made them and if they passed or failed.
2. Provide a copy of the minutes from the previous meeting to the Executive Board one-week prior to the next meeting. Make copies of the previous membership meeting available at each general membership meeting.
3. Conduct the official correspondence as directed by the Executive Board.
4. Perform such other duties as the Executive Board may require.
5. Read any correspondence that the Executive Board considers of sufficient importance to the membership meeting. Most correspondence will be handled at the Executive Board meeting and the Executive Board will decide how to dispose of them.
6. Call the roll of Officers and Stewards at the General Membership and Officers at the Executive Board meetings.
7. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
8. Make an effort to speak with new employees within their work group as soon as possible.
9. Be among the first to mobilize the membership when the need arises.
10. Be among the first to speak out in defense of the union / contract and support internal organizing.

11. Attend all Membership and Executive Board meetings.
12. Notify the Local President/Vice-President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.
13. Upon approval by the Local's Executive Board, be authorized to act as co-signer of checks drawn on the Local's funds in place of the President, Vice President/Chief Steward, or Treasurer, except those issued to self.
14. Review and approve all publications prior to release for print.
15. Notify Council 75 of changes in officers, as soon as possible.

Secretary Records

1. Secretary will maintain and protect (in order of meeting) written records of all meetings, specifically minutes and monetary motions (who made the motion - who seconded it and if it passed or failed).
2. Notice of Executive Board/Membership meetings shall be publicized. A notice may be sent out via Contact P.E.O.P.L.E./C.A.T. or Stewards to be passed out in various work areas may meet this requirement, or a monthly newsletter (if sent to all members).
3. All minutes (with motions highlighted or separated) must be kept for five years by the Secretary and given to her/his successor at the end of their official term where minutes older than five years shall be stored in a storage facility for a total of ten years.
4. Minutes of the General Membership and Executive Board meetings shall be made available prior to the next months meeting allowing time for review before the meeting itself.

Trustee:

The Trustee shall:

1. At least semi-annually, conduct an audit of the finances of Local 2067 as outlined in the Local 2067 Constitution. Trustees may recommend to the Executive Board an audit to be performed by a Certified Public Accountant
2. Report to the membership the results of such audit in a timely manner.
3. Be a non-voting member of the Executive Board. *A.F.S.C.M.E Financial Standards Code
4. Submit a semi-annual audit, which will be reviewed by the Executive Board and reported at the next general membership meeting.
5. The Senior Trustee shall maintain and transfer when leaving his/her position, all paperwork and documentation of audits and reports. This paper work shall be stored (by date) in the Local's file cabinet at the Union Hall for five years then moved to storage.
6. Make an effort to speak with new employees within their work group as soon as possible.
7. The Senior Trustee is the Trustee with the longest time in that office.
8. Attend all Membership and Executive Board meetings.
9. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
10. Attend annual Financial Standards workshop.
11. Notify the Local President/Vice-President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.

Sergeant at Arms:

The Sergeant at Arms shall:

1. Preserve the order of the body and proceedings at all meetings called by the President by removing hecklers and disruptive members from the meeting.
2. Monitor the time of which a speaker has been allowed to address the meeting (call time when appropriate).
3. Assure that no alcohol or firearms are brought into the meeting room.
4. Remind members that cell phones and pagers must be turned off or silenced.
5. Make an effort to speak with new employees within their work group as soon as possible.
6. Attend all Membership and Executive Board meetings.
7. To maintain an accurate list of members to be used for the monthly membership meeting progressive drawing process, the Sergeant at Arms will secure the list of active members from the Council 75 Office Specialist in March/April, and September/October of each year.
8. The Sergeant at Arms conducts the drawings at the monthly Membership meeting; **One \$30 door prize:** (drawing is held each month at the end of the general membership meeting for those members in attendance; Two **Progressive drawings** \$50 (minimum): All names of active membership are put into a drawing. The list is updated quarterly by the Council 75 Office Specialist and the list is secured by the Sergeant At Arms. The names will be put into a container to be drawn at each drawing. When names are drawn the members must be in attendance at the current meeting. The names are entered into the recorded meeting minutes. If there is no winner, the progressive drawing will increase by \$5 each month, until it reaches the maximum of \$150. If there is a winner, the Treasurer will write a check and present it to the winner. The drawing will drop back to \$50 the next month and start again.
9. Maintain a dated sign in sheet of who is present at each membership meeting and attach the list to the official minutes.
10. Notify the Local President/Vice-President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.

Union stewards:

The Union stewards shall:

1. Attend the General Membership and Steward Council meetings each month.
2. Provide fair representation to all employees covered under the bargaining contract.
3. Not make any decisions or commitments that will affect the Labor Contract or Local 2067, without Executive Board approval.
4. Adhere to all timelines regarding a grievance and/or arbitration.
5. Make an effort to speak with new employees within their work group as soon as possible.
6. Assure that all settlements are in writing.
7. Be among the first to mobilize the membership when the need arises.
8. Be among the first to speak out in defense of the union / contract and support internal organizing.
9. Actively promote Public Employees Organized to Promote Legislative Equality (P.E.O.P.L.E.) to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
10. In a timely and ongoing process, keep the Chief Steward informed on all grievance steps and

lingering issues not yet filed.

11. Actively participate in training opportunities.
12. Notify the Local President/Vice-President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.

Executive Board:

The Executive Board shall:

1. Be the governing body of the Local 2067, except when meetings of the Local 2067 are in session.
2. Consist of three (3) elected Members at large, four (4) current Local Officers, three (3) Trustees and the (1) Sergeant at Arms, (1) Communication/Technology Specialist.
3. All affecting policies, aims and means of accomplishing the purposes of the local not specifically provided for in the constitution or by action of the membership at a regular or special meeting shall be decided by the Executive Board.
4. The Executive Board shall meet at the call of the president or of a majority of the members of the Executive Board.
5. A report on all actions taken by the Executive Board shall be made to the membership at the next following meeting.
6. A quorum of at least five of the seven voting members is required to establish a quorum.

Executive Board Members:

The Executive Board Members shall:

1. Attend the General Membership and Executive Board meetings each month.
2. Not make any decisions or commitments that will affect the Labor Contract or Local 2067, without Executive Board approval.
3. Make an effort to speak with new employees within their work group as soon as possible.
4. Be among the first to mobilize the membership when the need arises.
5. Be among the first to speak out in defense of the union / contract and support internal organizing.
6. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
7. Notify the Local President/Vice-President whenever he/she will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.

Communications/Technology Specialist:

The Communications Specialist (Webmaster) shall:

1. Maintain the Local's Web page insuring that accurate and up-to-date in a timely manner.
2. Be responsible for producing the Local's website content.
3. Be a member of the Communications committee.
4. Attend both the General membership and the Executive Board meetings each month. Post to the web authorized information that may be gathered at any of those meetings as soon as possible.
5. Give an up to date "brief" report of the Web site's general content and status at each meeting attended.

6. Ensure published material contains tastefully displayed, union related information only and the Local 2067 logo is visible on at least the first page of every publication.
7. Be an appointed non-voting member of the Executive Board.
8. Be among the first to speak out in defense of the union / contract and support internal organizing.
9. Member of CAT Team.
10. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.
 1. Maintain all digital communication documents; such as: newsletter, orientation power point, flyers, membership CAT team database.
 2. Maintain hardware components: computers
 3. Advise for technical support and solutions
 4. Active technical advisor to e-board and stewards
11. Attend both the General membership and the Executive Board meetings each month. Post to the web authorized information that may be gathered at any of those meetings as soon as possible. With any exceptions.
12. Give an up to date “brief” report of the Web site’s general content and status at each meeting attended.
13. Ensure published material contains tastefully displayed, union related information only and the Local 2067 logo is visible on at least the first page of every publication.
14. Be an appointed non-voting member of the Executive Board.

CAT Team:

1. To disseminate pertinent and timely information to the membership.
2. Work in conjunction with the tech specialist.
3. Have quarterly C.A.T. team leadership meetings.
4. Maintain a conduit of information between membership and the leadership.
5. Recruit and maintain active CAT team members.
6. Be among the first to speak out in defense of the union/contract and support internal organizing.
7. Actively promote P.E.O.P.L.E. to help fight privatization, win fair contracts, expand job safety and maintain and/or increase health care benefits.

Officer / Steward Conduct

If an officer or steward is suspected of dereliction of duty or malfeasance (misconduct and/or unlawful act), the Local 2067 President and/or the Chief Steward shall document the action. The President and/or Chief Steward shall meet with the officer / steward to discuss the matter and set a timeframe for resolution. Action can include but is not limited to additional training, office change, or deduction in their monthly monetary pay, written or oral explanation to Executive Board, or written resignation. The Executive Board shall be kept informed on the process, and it shall be documented in the minutes of the meeting.

If an officer or steward is in the investigatory process with the city they may be placed on a leave of absence without pay for a period of time determined by President/Chief Steward and approved by the executive board.

Absences

1. In the event a person in a Union paid position cannot attend a meeting, the officer/steward must notify the President or Vice President in advance of the meeting or will be counted as “unexcused” absent. Notification can be made by phone call, text or email.
2. Person in a Union paid position shall only be excused from a regularly scheduled General Membership and/or an Executive Board meeting for the reasons of:
 - a. Illness/death in family
 - b. Personal emergency
 - c. Military duty
 - d. Jury duty
 - e. Vacation
 - f. Scheduled work
3. Other requested absences shall be determined by the Executive Board and must be requested in advance.
4. Excused and Unexcused absences shall be listed in the minutes.
5. In the event the officer / steward cannot attend a meeting, the President or Chief Steward must be notified in advance of the meeting. If the officer / steward fails to notify the President or Chief Steward, the monthly stipend will be reduced by 25% for the following month. If the officer / steward fails to attend three meetings in a row (without good cause or notification) the position will be considered vacant and the officer / steward will no longer be eligible for the stipend.
6. If an officer / steward duties that are to be performed by someone else for more than one month, the officer / steward stipend for that period will also be paid to the acting-in-capacity officer / steward who performed those duties. An officer / steward may be paid at the highest stipend but, at no time will an officer / steward be paid for two positions at the same time.
8. If a person in a union paid position is unable to perform their duties for 90 days they will no longer receive their stipend. And at that point they can decide to take a leave of absence or resign.

Vacancies

Vacancies in office shall be nominated by the President and filled for the remainder of the un-expired term by vote of the Executive Board.

Council 75 Council Representative:

The Council Representative shall:

1. Counsel the leadership of Local 2067 in solving problems with City of Salem management when they have difficulty working with, or attaining a resolution.
2. The Executive Board reserves the right to direct the Council Representative regarding specific communications with the City.
3. Inform the leadership of Local 2067 of the nature and extent of any pertinent communications with the City of Salem in a timely manner.
4. Be an advisor to the Bargaining Team of Local 2067 during the bargaining process unless asked to be the Chief Negotiator.
5. When appropriate, provide authoritative input from Oregon A.F.S.C.M.E Council 75 and A.F.S.C.M.E International.
6. Offer direction and guidance to Local 2067 leadership in matters of bargaining and or issues, which may have legal or other ramifications.
7. Not sign or make any binding agreements without Executive Board approval as noted in Article VIII Section 2 of Local 2067 Constitution.
8. Promote Local 2067 and Council 75 policies to the membership.
9. Advise, support and train Local 2067 Officers and Stewards.
10. Notify the Local President (in advance when possible) when the representative will be unable to perform his/her job duties. Notification must include date of expected absence and expected date to return to duty.
11. Be required to attend all Membership, Steward and Executive Board meetings as well as committee meetings when appropriate, such as bargaining sessions.

SECTION 3 COMMITTEES

Ad Hoc

A.F.S.C.M.E Local 2067 may have standing and Ad Hoc committees.

1. All members of all committees shall be released from their committees after the Presidential election. The President may at that time re-appoint all committee members or appoint new.
2. The President shall select or appoint chairs and all other members of all committees after assuming the duties of office, subject to the approval of the Executive Board.
3. The President shall select only those who are active members of Local 2067 for committee assignments.
4. Any Policy and Procedure changes will be brought to the Committee and the Committee may only make recommendations to the Executive Board for their consideration.
5. All committees will record brief minutes at all meetings. Minutes are to be maintained by the Secretary.
6. All standing committees should have a minimum of three (3) members, with the exception of the Elections Committee, which shall consist of five (5) members.

Standing Committees

Each Standing Committee will develop a basic outline of duties and responsibilities.

The nine Standing Committees shall be referred to as:

Budget

Communications (Web Page, C.A.T. Team)

Contributions

Elections

Good & Welfare

Healthcare Design Committee

Joint Labor Management Committee (J.L.M.C.)

Membership

Political Action Committee (P.A.C.)

SECTION 4

LOCAL 2067 PROPERTY, SUPPLIES & EQUIPMENT

All property of Local 2067 will be accounted for at all times; an itemized list of all property (with available serial numbers) shall be maintained by the Treasurer and updated annually.

The Treasurer will keep and maintain a master list identifying all members' assigned property such as the Local's computers, printer, keys, sound system, etc.

SECTION 5

GRIEVANCE/ ARBITRATION PROCESS

1. As used in the contract., the term "grievance" means any claim by or on behalf of a particular employee or party to this contract that such claimant's rights, benefits, privileges, or interests under this contract have been violated or that this contract has been misapplied to such claimant in a particular case.
2. No grievance shall be started without notification or approval of the Stewards Council or Chief Steward. In the absence of the chief steward you must have the president's approval.
3. All grievances will be kept on file with the Chief Steward.

Arbitration

1. No grievance may go to arbitration without first obtaining approval of the Stewards Council and then gaining approval from the Executive Board.
2. The Steward Council and Executive Board will make the decision to take a grievance to arbitration based on the following considerations:
 - is the resolution practical and have the terms of the contract been violated?
 - is there a past practice in place?
 - is this a precedent setting issue?
 - what is the impact on the general membership?
 - has it been assessed by Council Staff or Council 75 attorney with a recommendation given to

- the Eboard as to the likelihood of winning or losing the arbitration?
 - what will do the most good for the majority of members in the local?
3. If the Steward Council and Executive Board decide not to take a grievance to arbitration, a reason will be provided in writing. And the grievant may appeal to the Executive Director of Oregon A.F.S.C.M.E. Council 75. The Executive Director will be asked to review the grievance under these standards and policies of Local 2067. The Executive Director will make a recommendation to the Executive Board within 30 days. The Executive Board will review the Executive Directors recommendation, make a final decision and notify the griever as soon as possible.

SECTION 6
COMMITTEE ACTIONS APPEAL PROCESS

Any actions taken by the Committees for Local 2067 (whether standing or ad hoc) may be appealed by any member in good standing.

- Appeal to reconsider may be made to the committee in writing within five (5) calendar days of the action.
- After an appeal for reconsideration has been made to the committee and its response returned to the member, further appeals may be made directly to the Executive Board.
- Upon such appeal, the Executive Board may select a committee to investigate and report its findings back to the Executive Board and to the committee whose actions are being appealed.
- The Executive Board will make a determination.
- The member may then appeal to the General Membership.

Additional rights of appeal may be granted by the A.F.S.C.M.E International Constitution.

SECTION 7
MISCELLANEOUS

Endorsements: Products/Programs/Campaigns (non-political)

1. Proposals may be brought to the Executive Board after first requesting to be placed on the agenda.
2. The Executive Board will discuss the matter without the vendor, and decide if the proposal has merit. If merit is found they will discuss how to proceed and inform the presenter of their findings and announce it at the next meeting.
3. If no merit is found, the Executive Board will inform the presenter of their findings with no further action.
4. Considerations for deciding merit:
 - Does it have a benefit to the Local's strategy or the membership (consider to what degree)?
 - Could it place the Local in a liable position (legal, political or ethical)?
 - Does the proposal have a secondary element that could cause harm?
 - Is there a monetary condition attached to the proposal (is it covered in the budget)?
 - Are there any actions of the Membership or Executive Board required or requested in

this proposal?

- Is there a timeline or timeframe for this proposal?

After determining whether to offer the product/ services or not, the Executive Board will inform the vendor of their decision and take appropriate action as stated above.

Retirement/Layoff Benefits: As described in Local 2067 Constitution

A member must be in good standing for five (5) years prior to retirement/layoff **and must have attended at least one membership meeting within those five consecutive years** to receive retirement/layoff benefits. The retiring/layoff member will receive ten dollars (\$10) for each year **the member was in good standing with the union** upon retirement.

(Criteria for Policy and Procedures only - not to be included in Constitution)

Criteria that must be followed to receive a retirement/layoff check

1. Member must have been a member in good standing with Local 2067 for the previous five years.
2. Member must have attended at least one membership meeting within those past five years.
3. Obtain a letter from City of Salem Human Resources department stating the date the member is to officially retired/laid off and the date the member began paying membership dues (including any breaks in membership). An email from HR department will be sufficient.
4. Member must attend a Local 2067 membership meeting to receive check.
5. Member must contact & inform Local 2067 Treasurer at least two weeks prior to receiving check.
6. No retirement/layoff checks will be given after 90 days from the retirement/layoff date.

SECTION 8 **FINANCIAL**

Release Time Policy (time loss of work)

After lengthy discussions Local 2067 has decided it will not pay for employee/member time loss for the member to attend Union activities or functions.

Travel Expenses

Expenses whether prepaid or reimbursement, must be approved by the Executive Board.

1. Same Day Travel

- a) Mileage will be reimbursed at the current IRS rate going to and returning from approved destinations. Mileage will be paid from the member's home address to the location of travel.
- b) Reimbursable expenses may include parking, meals and registration fees.
- c) Receipts must be provided and requests must be on the Union Expense form.
- d) Reimbursement must be approved by Executive Board.

2. Overnight Travel

- a) Registration, transportation and lodging will be paid in advance by the Local.
- b) Expenses including per diem, must be listed on an expense report with receipts. All hotel bills must be turned in even if the Local or Council 75 prepays for them.

3. Per Diem

- a) Per Diem will be paid at the appropriate IRS rate (found in the International Standards codes) for the City traveling to.
- b) Departure & return days may be paid at $\frac{3}{4}$ rate- however, if travel time is twelve hours or more to the destination, full per diem may be paid.
- c) Per diem does not apply to Same Day travel

Non -Travel Expenses

Reasonable Union business expenses (i.e.: paper, ink, stamps, lunch etc.) may be reimbursed by Local 2067 with Executive Board approval but must be submitted on union expense form and have receipts attached.

Check Signing Procedure

- 1) In all cases the following is the procedure for check signatures:
 - a) All checks must have **TWO** signatures in accordance with International Union's Constitution and Financial Standards Code.
 - b) The only signatories for Local 2067 are the President, Vice President, Treasurer, and Secretary. Officers cannot sign their own checks.

Funds Management

Authorization of Transferring Funds:

Two signatories must authorize any transfer of funds from one "internal" account to another and an explanation from the Treasurer must be provided at the next meeting.

Investing Locals Monies:

All investments must be approved by the Membership.

CD (Certificate of Deposit) is the current approved method of investing the Locals monies.

The Local's monies must never be invested in "high risk" investments.

Maintaining Funds:

All monies will be deposited as soon as possible and reported at the next Executive Board meeting. The Treasurer will assure that the Local's accounts are balanced and reported monthly to the Executive Board and with the Trustees assistance, reconciled semi-annually.

SECTION 9

MEMBERSHIP DUES

Local Membership Dues

Local 2067 membership dues are deducted through payroll - at one and one half percentage (1.5%) of the gross pay as set by the Local Constitution. (See Section 1 for mandated affiliation dues.)

SECTION 10
MAILING LISTS and LABELS

The Council 75 Office Specialist located at the Salem Oregon office, maintains the mailing list and labels for Local 2067 membership.

Social Security numbers and other confidential information shall be removed or BLACKED out of lists or labels prior to review by anyone other than Officers or Executive Board members.

SECTION 11
COMMUNICATIONS

Communications Committee:

This committee shall remain informal without the need for recorded minutes. The committee shall oversee the creation, approval and distribution of all communications of Local 2067 that the President has not already approved.

This committee shall consist of a minimum of four members, but will always include the President, Chief Steward, Communication Specialist and one member at large.

The Committee will make every effort to publish and distribute a newsletter bi-monthly, except during bargaining sessions when it may be published and distributed more frequently.

The newsletter shall provide information regarding meeting dates & times, highlights of recent and upcoming meetings and events. The newsletter should be a source of information for all work units.

Bargaining information shall “not” be published “until approved” by the Bargaining Team.

Committee Responsibilities:

Assist in creating and publishing articles, memos and flyers that reflect in writing the authors intent.

All communications representing Local 2067 shall have prior authorization by this committee or any other approvals set forth by Local 2067.

They shall utilize electronic distribution (including but not limited to E-mail or Web page) whenever possible to lesson the environmental impact of excessive paper use by Local 2067.

Contact P.E.O.P.L.E. / C.A.T. member:

Contact P.E.O.P.L.E. / Member Action Team (C.A.T.) members are the primary contact members for the Local. These members shall insure flyers, handouts and messages make it into the hands of the general membership within assigned work groups. Contact P.E.O.P.L.E. / Communication Action Team (C.A.T.) members are most important during the bargaining process; and are an important source of member contact throughout the year. Each person on the contact list should be

provided with information to pass to the people in the appropriate work group at least quarterly. Often times it is only a highlight of a past meeting or upcoming meeting dates.

These contact people / C.A.T. members are a crucial element to the communication to the general membership, are volunteers who will assist in maintaining a strong Local, and will distribute and post provided information at work sites.

The contact list should have the name, home address, home telephone number, and work site location of each contact person. The list must be available to the Executive Board and periodically verified and updated.

SECTION 12 **ELECTIONS**

Committee

An elections committee consisting of five general membership members, shall be appointed by the President by November of each year. Nominations for officers shall be given 15 days prior to the March and April membership meetings. No action will be taken in May, elections will be held in June, with elected officers taking office in July at the Executive Board meeting.

Procedures: See Elections rules booklet

Office:

President - Two year term (even number years)

Vice President - Two year term (odd number years)

Secretary - Two year term (odd number years)

Treasurer - Two year term (even number years)

Sergeant at Arms - Two year term “appointed” (even year)

Executive Board - Three at 3 year terms (staggered one year apart)

Trustees - Three at 3 year terms (staggered one year apart)

SECTION 13 **POLITICAL ACTION COMMITTEE (P.A.C.)**

Local 2067 P.A.C. shall be involved locally with elections, nominations and endorsements for Congressional District-5 (CD-5), and the local government political process including Bond and Ballot measure issues in Marion, Polk and Yamhill Counties. Local 2067 P.A.C. Committee should also participate in School Board selections and all elected Officials within those three counties.

All P.A.C. members must be registered voters in the State, P.A.C. members may be asked to assist during election cycle with phone banks, candidate interviews, and other political activities.

City Council:

Local 2067 shall strive to maintain communication with the City Council and Mayor and to

participate in the City Council election process. Local 2067 should try to have at least one member attend every (open) City Council meeting.

Election Process:

Refer to the International Election procedures

Committee Development:

By November of each year the President shall appoint members to the P.A.C.

Campaign Support:

Any political contributions must be paid out of the **P.A.C.** checking account only and should be limited to the budgeted amount for that year.

Endorsement Process:

The **P.A.C.** will make a report and recommendation to the Executive Board *for political endorsements* based upon interviews with candidate information gathered and opinions of the membership.

P.E.O.P.L.E.

All officers, stewards and members of the Executive Board are encouraged to be at least minimal P.E.O.P.L.E. contributors.

SECTION 14

CONVENTIONS / CONFERENCES

Delegates:

Shall be nominated and elected as per A.F.S.C.M.E. International requirements.

Travel Fund:

Refer to Council 75 Travel Fund.

Workshops:

All allowable expenses for pre-approved workshop and training, shall be reimbursed after an expense report is completed and submitted to the Treasurer. Expense reports must be submitted in a timely manner (within three months of the event).

Reimbursement:

Approved expenses shall be reimbursed (after submitting the expense report) by the next Executive Board meeting.

Per Diem:

Per Diem is paid as per the International Secretary-Treasurer Standards Code, Section 9.8 (overnight travel is non-taxable “as long as conditions are met”- not exceeding maximum Federal rate, is overnight stay, is union business, and an expense report is filed. (See Section 9.17 in Standards Code for Per Diem City Rates.)

Resolution / Endorsements:

Refer to Council 75.

SECTION 15
BARGAINING

Issue Development:

A pre-bargaining survey should be developed, it would be wise to begin nine months to one year prior to the start of bargaining.

Team Selection:

The Bargaining Committee shall be made up from the general membership; the Executive Board shall approve the Bargaining Team from the members of the Bargaining Committee.

Strategy Development:

Develop a strategy based upon the results of the pre-bargaining survey. Create a bargaining committee and a time-line schedule. Some actions may include but are not limited to, a census, a survey, a budget analysis, some bargaining proposal suggestions, pre-bargaining notice to membership, contract training, Steward updating and recruitment to fill any vacant steward positions.

Be sure to include in the timeline schedule a bargaining-day rally, one or two public strikes, create a credible strike threat, some job site actions as-well-as community actions. Be sure to participate in local government elections (City Council). Factor in 150 days of bargaining, mediation time and the date the contract will expire.

Contract Issue Tracking:

The Bargaining Team should be aware of the concerns of the membership; the C.A.T. members should know if the membership is still behind an issue that was established during the survey phase. Communication to the membership during the bargaining process will be most important! Information will include but is not limited to News Flash, Local 2067 bulletin board postings, etc., and information can also be posted on the website.

SECTION 16
AMENDMENTS TO THE POLICY AND PROCEDURES MANUAL

Requests to amend the Policies and Procedures may only be submitted by a member in good standing with Local 2067 and must be directed to the Executive Board of Local 2067 in writing. Requests will be referred to a Policy and Procedures Committee, standing committee or ad-hoc committee concerned.

That committee will review the request, investigate the change, interview the initiating member, if necessary, and report their recommendation back to the Executive Board.

Taking into account the recommendation of the Policy and Procedures committee, the Executive

Board will discuss the findings, further amend or not, and shall vote whether to adopt. If adopted, the manual will be edited, the amendment shall be presented to the general membership at the next membership meeting, and the updated manual will be printed for officers and Executive Board members.

These Policy and Procedures shall be reviewed, updated and approved by the Executive Board in August of each year, unless the Policy & Procedures Committee convenes, in which case, the Committee will review and recommend any changes to the Executive Board.

Appendix A

Charitable Contributions

Criteria for Charitable Donations

A.F.S.C.M.E. Local 2067 has proudly supported a broad spectrum of community related causes. Local 2067 charitable donation activities are focused on three key initiatives:

- 1. Education**
- 2. Health**
- 3. Community Awareness**

Criteria for Assessing Donations

Organization Qualifying for donations will be those which:

Provide services for those who may be denied a quality of life enjoyed by the majority.

Offer services for the benefit or enjoyment of the public and contribute to community well-being or promote education and learning. Give time and resources to alleviating social problems.

Does the organization provide:

Welfare and Social Services - including services for the physical and intellectually challenged.

Community support - including care of the young and aged.

Youth and Education - including support of school projects and after school activities.

Cultural activities and recreation - including performance and promotion of music, the arts and other activities those are beneficial to the community.

Donations will *NOT GENERALLY* be given to:

Commercial organizations.

Payments of ongoing salaries or wages.

National organizations except where the funds are intended for the community covered by A.F.S.C.M.E. Local 2067.

Organizations for the purpose of redistributing to others who could make an application to A.F.S.C.M.E. Local 2067 in their own right.

Request to support activities outside the service area.

In particular, donations will not be made to organizations of an ideological nature.

Religious organizations will not receive donations for the direct support of

evangelizing but will be considered if the purpose otherwise qualifies.

Organizations are discouraged from becoming dependent on donations for ongoing operating expenses.