



# **Policies and Procedures**

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

### City of Salem

Local 2067 Executive Board

Approved August 8, 2014

Updated August 16, 2018

Updated July 16, 2019

Updated August 6, 2020

Updated July 15, 2021

Updated December 1, 2022

Updated August 3, 2023

Local 2067 Policy & Procedures created in December 2003

Review annually each July

## Contents

SECTION 1: AFFILIATIONS .....	1
SECTION 2: GOVERNING BODY .....	1
SECTION 3: COMMITTEES.....	11
SECTION 4: LOCAL 2067 PROPERTY, SUPPLIES & EQUIPMENT.....	11
SECTION 5: GRIEVANCE/ARBITRATION PROCESS .....	11
SECTION 6: COMMITTEE ACTIONS APPEAL PROCESS .....	12
SECTION 7: MISCELLANEOUS .....	12
SECTION 8: FINANCIAL .....	13
SECTION 9: MEMBERSHIP DUES .....	15
SECTION 10: MAILING LISTS AND LABELS.....	15
SECTION 11: COMMUNICATIONS .....	15
SECTION 12: ELECTIONS.....	16
SECTION 13: POLITICAL ACTION COMMITTEE (P.A.C.).....	16
SECTION 14: CONVENTIONS / CONFERENCES .....	17
SECTION 15: BARGAINING .....	17
SECTION 16: AMENDMENTS TO THE POLICY AND PROCEDURES MANUAL .....	18
APPENDIX A: CHARITABLE CONTRIBUTIONS .....	18

## **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 the Local 2067 and the International Constitutions.

### **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 member)

Three Trustees (attend meetings as non-voting members)

\*See A.F.S.C.M.E Financial Standards Code Article 11, section 1

Communication 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 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 the Executive Board has approved any agreement, it must be signed by The Council 75 Representative and either the President or the Vice President.

### **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.

**Executive Board 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 (2021-2024)
- Elected to three-year term (2022-2025)
- Elected to three-year term (2023-2026)

**Trustees:**

- Elected to three-year term (2021-2024)
- Elected to three-year term (2022-2025)
- Elected to three-year term (2023-2026)

The Executive Board shall give notice 15 days prior to the March meeting that nominations will be held at the March and April membership meetings. In cases where there are no contested positions, ballots will not be mailed and candidates will take the oath of office within 10 days of the April membership meeting. If one or more positions are contested, the Election Committee will prepare and mail ballots in May at least 15 days prior to the selected election date. Ballots shall be returned to the Council 75 Salem office. Elected candidates will take the oath of office within 10 days of the election as directed in the International AFSCME Local Union Election Manual.

When an election results in a new President, Vice President, Secretary or Treasurer, the outgoing officer may continue as a consultant through July 31 to ensure a smooth transition of responsibilities.

**Officers / Stewards Compensation:**

Local leaders will receive the following monthly compensation:

President	\$325.00
Vice President (Chief Steward)	\$300.00
Secretary	\$175.00
Treasurer	\$275.00
Union steward	\$150.00
Executive Board Member	\$100.00
Trustee	\$100.00
Sergeant at Arms	\$100.00
Communication Specialist (appointed office)	\$100.00
Membership Action Team (MAT) Coordinator	\$75.00

## **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 Local’s 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. Union owned credit cards are authorized to be issued to the Treasurer. No one else is authorized to use these credit cards without Treasurer's approval.
5. Attend all Membership and Executive Board meetings.
6. 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.
7. Maintain the records of all properties belonging to Local 2067.
8. Obtain a surety bond from the International Treasurer for an amount to be fixed by A.F.S.C.M.E International.
9. Attend Financial Standards workshop annually.
10. 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

11. 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.
12. Make available to the three Trustees, all necessary financial documentation needed to perform the required audits and reports of the local's financial records.
13. 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.
14. 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.
15. Make an effort to speak with new employees within their work group as soon as possible.
16. Be among the first to mobilize the membership when the need arises.
17. Be among the first to speak out in defense of the union / contract and support internal organizing.
18. 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 -by 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. 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. 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.
3. Minutes of the General Membership and Executive Board meetings shall be made available prior to the next month's 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 semiannual 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 to silence electronic devices.
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. The Sergeant at Arms conducts the drawings at the monthly Membership meeting; One **\$50 door prize**: (drawing is held each month at the end of the general membership meeting for those members in attendance; When names are drawn the members must be in attendance at the current meeting. The names are entered into the recorded meeting minutes.
8. Maintain a dated sign in sheet of who is present at each membership meeting and attach the list to the official minutes.
9. 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 Specialist.
3. Decide on 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.
4. Meet at the call of the president or of a majority of the members of the Executive Board.
5. Report on all actions taken by the Executive Board to the membership at the next meeting.
6. At least 2/3 of the sitting, 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 Specialist**

The Communications Specialist shall:

1. Maintain the Local's Web page ensuring that it is updated in a timely manner.
2. Be responsible for producing the Local's website content.
3. Attend both the General membership and the Executive Board meetings each month.
4. Be an appointed non-voting member of the Executive Board.
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. Maintain all digital communication documents; such as: newsletter, orientation power point, flyers, membership message database.
8. Active technical advisor to the Executive Board and Stewards

### **Membership Action Team (MAT) Coordinator**

1. Disseminate pertinent and timely information to the membership.
2. Work in conjunction with the Communication Specialist.
3. Have quarterly MAT leadership meetings.
4. Maintain a conduit of information between membership and the leadership.
5. Recruit and maintain active MAT 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 monthly pay, written or oral explanation to the 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.

### **Email/Online Accounts**

Officers and stewards may request an [afscme2067.org](mailto:afscme2067.org) email account from the Communications Specialist. Officers and stewards may also create email accounts or other online accounts (Facebook, Instagram, etc.) for Union work. Upon leaving office, officers and stewards will cease using any accounts created for Union work or which have a name that references their position or the local, e.g. [AFSCME2067president@gmail.com](mailto:AFSCME2067president@gmail.com). The account will be turned over to the Union as part of passing Union property to the successor in office by providing the Union with the relevant login information.

### **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 a an “unexcused” absence. Notification can be made by phone call, text or email.
2. A person in a Union-paid position shall only be excused from a regularly scheduled General Membership and/or an Executive Board meeting for one of the following reasons:
  - a. Illness/death in family
  - b. Personal emergency
  - c. Military duty
  - d. Jury duty
  - e. Vacation
  - f. Scheduled work

3. Other reasons for excusing 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's duties 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 60 days they will no longer receive their stipend. 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 unexpired 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 members.
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 people who are active members of Local 2067 for committee assignments.
4. Any Policy and Procedure changes will be brought to the to the Executive Board for their consideration.
5. 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 Standing Committees shall be referred to as:

**Budget**

**Contributions**

**Elections**

**Good & Welfare**

**Healthcare Design Committee**

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

**Membership Action Team (MAT)**

**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. The Chief Steward and the Stewards Council shall be notified of all grievances.
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:
  - i) is the resolution practical and have the terms of the contract been violated?
  - ii) is there a past practice in place?
  - iii) is this a precedent setting issue?
  - iv) what is the impact on the general membership?
  - v) what recommendation have Council Staff / Council 75 attorneys made about the likelihood of winning or losing the arbitration?
  - vi) what will do the most good for the majority of members in the local?

If the Steward Council and Executive Board decide not to take a grievance to arbitration, a reason will be provided in writing to the grievant. 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 Director's recommendation, make a final decision and notify the grievant 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 Benefits:** As described in Local 2067 Constitution, a member must be in good standing for five (5) years prior to retirement **and must have attended at least one membership meeting within those five consecutive years** to receive retirement benefits. The retiring member will receive twenty-five dollars (\$25) for each year **the member was in good standing with the union** upon retirement.

#### **Criteria that must be followed to receive a retirement 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 be officially retired and the date the member began paying membership dues (including any breaks in membership). An email from the HR department will be sufficient.
4. Member must attend a Local 2067 membership meeting to receive check.
5. Member must contact and inform Local 2067 Treasurer at least two weeks prior to receiving check.
6. No retirement checks will be given after 90 days from the retirement date.

## **SECTION 8: FINANCIAL**

### **Release Time Policy** (time loss of work)

Employee/member time loss may be paid for the member to attend Union activities or functions as approved by the Executive Board.

## **Travel Expenses**

Expenses whether prepaid or reimbursed, 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 destination City.
- b) Departure and return days will be paid at  $\frac{3}{4}$  rate- however, if travel time is twelve hours or more to the destination, full per diem will 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**

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.

**Union-Owned Credit Card:**

Union-owned credit cards are authorized to be issued to the Treasurer. No one else is authorized to use these credit cards without approval of the Treasurer

The Union-owned credit cards shall only be used for Union related purposes and activities. Personal charges on the Union-owned credit card are strictly prohibited. If the Union-owned credit cards are inadvertently used for personal charges, the card holder shall immediately reimburse the Union for such charges.

All expenditures resulting from the use of the Union-owned credit card shall be documented and reported in accordance with Council expense accounting practices procedures and forms as well as be in compliance with the International Financial Standards Code.

Credit card can only be used for approved Union-related expenditures, for example: Conventions, trainings, hotel accommodations, and other e-board approved Union activities.

**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.

Lists can only be authorized by the President, Vice-President, Executive Board, or Council 75 representative for Local 2067 functions only.

**SECTION 11: COMMUNICATIONS**

**Membership Action Team (MAT)** members are the primary contact members for the Local. These members shall ensure flyers, handouts and messages make it into the hands of the general membership within assigned work groups.

## **SECTION 12: ELECTIONS**

### **Committee**

An elections committee consisting of five general membership members, shall be appointed by the President by November of each year

**Procedures:** The Local shall follow the rules in the International AFSCME Local Union Election Manual for conducting elections.

## **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 September 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 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**

Planning should begin nine months to one year prior to the expiration of the contract.

### **Team Selection:**

The Bargaining Committee shall be from the general membership. The Executive Board shall approve the Bargaining Team from the members of the Bargaining Committee. The President shall be a member of the Bargaining Team.

### **Strategy Development:**

The Bargaining Committee will conduct a survey of members to determine priority issues and develop a strategy based on member priorities. A complete bargaining timeline will also be developed to include the survey, committee meetings, member communications, possible rallies, mediation and strike dates.

## **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 provided to the Executive Board of Local 2067 in writing. Requests may be referred to a Policy and Procedures Committee.

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

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 made available on the Local's website

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.
- 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.