

# AFSCME Retiree Officers Manual





## To all AFSCME Retiree Chapters and Subchapters:

Congratulations on your election! As an elected officer of an AFSCME Retirees chapter or subchapter, you have a position of both great responsibility and great satisfaction.

AFSCME members elected you to fulfill certain functions on your Retiree Executive Board, to represent them before lawmakers and the public, and to carry out chapter or subchapter policy between general membership meetings. The members rely on you to guide them in making important decisions, to keep them informed about retiree issues and relevant social concerns, and to work toward building a stronger organization with active, motivated members.

To do these things—and do them well—you’ll need a thorough knowledge of the programs and principles of our union and the mandated duties of your office. Your effectiveness will be enhanced by a good understanding of what leadership means, including the ways a leader can encourage members to work together for the benefit of their union.

This AFSCME Retirees Officers’ Manual will help you meet the challenges and opportunities before you. Along with the International Constitution and the constitutions of your chapter and subchapter, this manual will serve as a practical guide to your responsibilities as an officer. It includes tips on how to gain self-awareness as a leader and practical suggestions on how to build or maintain an effective retiree organization in AFSCME.

We urge you to use the manual to prepare yourself for the job ahead. It may well be one of the most challenging and rewarding jobs you’ve ever had.

Good luck!



Lee Saunders  
*President*



Laura Reyes  
*Secretary-Treasurer*

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# Introduction to Leadership Skills

## Styles of Leadership

There is no single mold that a leader must fit. Leaders come in all shapes, sizes, and colors. Some are loud and pound the table; others prefer to direct from the sidelines. Some are visionary, always experimenting with new ideas and schemes; others are hard-nosed and practical.

### How do you find a style that's good for you?

- Be yourself. An approach that is comfortable and suits your personality will work best.
- Trust your instincts and experience. You are going to be more successful if your actions make sense to you.
- Don't be afraid to ask for advice. A good leader is not someone who knows all the answers but rather one who knows when to ask and where to get the answers.
- Encourage others to share the responsibility (and the fun) of leadership. A leader who does everything himself or herself is not going to have an involved membership.

Keep in touch with members. They are your source of strength and the union's best resource.

## Leadership Qualities

Although many different kinds of people become successful leaders, the following qualities\* are found to some degree in all good leaders. Again, these qualities can be acquired and strengthened through effort and experience; they are not part of a pre-packaged personality marked "leader."

**1. A good leader likes people.** Most of a leader's work is working with people: talking with them, listening to them, working with

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**Note:** \*Excerpts taken from *Organizing: A Guide for Grassroots Leaders* by Si Kahn.

them in groups. Most of the time you spend as a leader is spent with people. If you don't really like people, if you don't really enjoy being with them, it shows. If you really do like people, that shows, too.

**2. A good leader is a good listener.** A good leader is not just a good speaker. In fact, listening often is more important than talking. In this world, the people who aren't on top don't get listened to very much. Nobody asks their opinions. Nobody wants their advice. But most people have pretty good opinions, at least about the things that affect their own lives. They'd like someone to listen to those opinions.

**3. A good leader makes friends easily.** If you're going to spend a lot of time working with people, it helps if they like you and think of you as a friend. If you're not open to making new friends, it may be difficult for people to work with you.

**4. A good leader builds trust easily.** Building trust isn't quite the same as having people like you. All of us know people we like but don't quite trust. But we need to be more than popular. We need to be trustworthy. When we lead people, we encourage them to take risks in their lives. They need to trust us enough to take those risks.

**5. A good leader talks well.** You knew this one would be in the list somewhere. But talking well doesn't mean being a public speaker. It just means being comfortable talking about your own ideas. It also means being able to express those ideas in language plain enough so that most people can understand them.

**6. A good leader helps people believe in themselves.** In order for people to become active in the retiree group, they must believe that their involvement will make a difference. They need to develop confidence in their own abilities and worth as a team member. Encouragement from someone they respect really helps.

**7. A good leader can let others take the credit.** If you solve other people's problems for them, you get the credit. But if you help them solve that problem for themselves, they get it. As a leader you have to be big enough to let that happen.

**8. A good leader works hard.** Fulfilling the responsibilities of a leader often means putting in extra time and effort. You have to be willing to spend time and thought on work that is not always glamorous or exciting.

**9. A good leader doesn't get discouraged too often.** Everyone gets discouraged from time to time. It's impossible not to when you're working with people who have serious needs that in many cases aren't going to be met. But if you get discouraged too often, you can't work effectively.

**10. A good leader asks questions.** Asking questions is one of the best ways to get people to think, speak, and act for themselves. If leaders were only allowed three phrases, they should be "What if...?" "What do you think?" and "How do you feel?"

**11. A good leader is open to new ideas.** In building a strong retiree group we're always trying to learn from experience. But we also know that just because something worked the last time doesn't mean it will work this time. As a leader, you should be open to any idea the people you work with suggest, even if at first it seems unfamiliar or strange. You never know.

**12. A good leader is flexible.** You'll find that people and events often change quickly. You need to be able to change with them. If a plan you spent a lot of time putting together depends on a certain situation and that situation changes, you have to be emotionally able to abandon your plan and come up with a new one.

**13. A good leader is honest.** You shouldn't fool either the people you work with or yourself. You don't want to pretend things are going well when they aren't. Be honest enough to tell people things they may not want to hear.

**14. A good leader sets limits.** Just as you don't want to use the people you work with unfairly, you don't want them using you. If you start out doing everything for people, you'll never be able to help them do things for themselves. You need to be able to say "No."

**15. A good leader is courageous.** This doesn't mean that you need to be prepared to face physical danger. The courage a leader needs is of a quieter kind: to keep going when that's hard to do, to be able to tell people things they don't want to hear, to take risks, and to open yourself to criticism.

**16. A good leader has vision.** In union-retiree work, we're actually trying to build a better world through people working together. A good leader has a dream of that better world.

**17. A good leader has a sense of humor.** As a leader you see a lot of pain and suffering. It's hard not to take that suffering and pain on yourself. But you can't allow it to dominate your life. You have to laugh sometimes, too.

## Duties of Retiree Officers

This section deals with the duties of retiree chapter and subchapter officers. The following pages summarize and clarify the major duties of each office. To be well prepared, officers should carefully study this section, along with the constitution and by-laws of the retiree chapter and subchapter.

### The President

The chapter or subchapter President performs many jobs.

The President chairs the membership meeting. He or she also chairs the Executive Board, which administers the affairs of the organization between meetings.



### **The President is:**

- the ceremonial officer who presides at initiations, installations and on other occasions.
- a good listener to every member who has a problem.
- a negotiator, parliamentarian and publicist.
- a community leader.

A good President is skillful in bringing people together for a common purpose.

### **The President shall:**

- (a) preside at all general meetings of the chapter or subchapter, as well as of the Executive Board.
- (b) be a member of all committees except election committees.
- (c) countersign all checks drawn against the funds of the chapter or subchapter.
- (d) appoint all standing committees and all special committees, subject to the approval of the Executive Board.
- (e) report periodically to the membership regarding the progress and standing of the organization and regarding the President's official acts.

### **Appoints Committees**

The President appoints all committees, subject to the approval of the Executive Board. Any member who volunteers for a specific committee should be considered. It's important that the appointees aren't just good friends of the President. In fact, a committee assignment is often a good place for the member who always has a gripe. It may encourage that member to find practical solutions to problems, or develop a more considerate attitude.

A wise President delegates a lot of responsibility to committees, keeping them large and active. The President keeps in touch with the committee chairperson and tries to attend the committee meetings whenever possible. Committee activity can help the President do a good job.

## **Financial Responsibilities**

When it comes to financial matters, the President must be especially careful. Checks should be signed by both the Secretary-Treasurer and the President. When signing a check, the President should make sure that the expenditure has been approved by the membership or is one for which advance authorization has been given. The invoice should be attached to the check for comparison. When the President is going to be away, someone should be deputized, with Executive Board approval (usually the Vice President or an executive assistant), to sign checks for the President. The President should never pre-sign a check before it is made out. Signing blank checks is a dangerous practice that could result in huge chapter expenditures that were never authorized.

## **Presiding at Membership Meetings**

The retiree group's local membership meetings, which the President chairs, must be held monthly. Special meetings may be called by the President, by the group's Executive Board or by petition from members.

The President should plan meeting agendas with the total membership in mind, and should avoid concentrating on individual problems that may not affect everyone.

## **Presiding at Executive Board Meetings**

The Executive Board meets at the call of the President or a majority of the Board members. It governs the chapter or subchapter between membership meetings or conventions. The President chairs the Executive Board meeting.

All matters affecting the policies, aims and operations of the retiree organization that are not specifically provided for in the constitution or by the action of the membership shall be decided by the Executive Board.

The Executive Board receives reports from all committees and checks on committee activities. The Executive Board also plans the agenda

for the membership meeting. All actions taken by the Executive Board should be reported at the next general membership meeting.

### **Reporting to the Membership**

If the chapter or subchapter is undertaking a new project or program, the President must inform the members. For example, if your organizing committee is starting a new project, discuss it at a membership meeting. First, there might be volunteers. Second, there might be useful suggestions. Third, there should be general support of any new program. No membership ever supported a President who operated secretly.

### **The Vice President**

#### **The Vice President shall:**

- (a) assist the President in the work of the President's office.
- (b) in the absence of the President or in the President's inability to serve, preside at all meetings and perform all duties otherwise performed by the President.
- (c) upon approval by the chapter or subchapter Executive Board, be authorized to act as co-signer of checks drawn on the organization's funds (in place of either the President or the Secretary-Treasurer).

If the organization's bank account is set up so the Vice President can co-sign checks, there is less danger of getting into the bad practice of having the President or Secretary-Treasurer pre-sign blank checks.

Many retiree groups appoint the Vice President to be chairperson of the **Organizing Committee**. This is an important committee and the Vice President can help train the volunteer organizers. Because he or she is close to the President, the Vice President can use this opportunity to build a strong link between the officers and membership.

## **The Secretary-Treasurer**

### **The Secretary-Treasurer shall:**

- (a) receive and disburse all monies of the chapter or subchapter.
- (b) deposit all money received in the name of the chapter or subchapter in a bank or banks selected by the Executive Board; money so deposited shall be withdrawn only by check signed by the President and the Secretary-Treasurer or other designated co-signer.
- (c) prepare and sign checks only for the purposes required by the organization's constitution or authorized by the membership or the Executive Board.
- (d) prepare the monthly membership report, submit it to the International Union office, and see that a check is drawn in payment of the organization's per capita tax each month. Subchapters should send this amount to the statewide chapter office, which will forward it to the International Secretary-Treasurer. The formula for dispersing the remaining dues will be determined by the chapter and defined in each chapter's constitution.
- (e) keep an accurate record of receipts and disbursements and submit to the membership a monthly operating statement of the financial transactions of the chapter or subchapter for the previous month.
- (f) act as custodian of all properties of the retiree organization.
- (g) give a surety bond for an amount to be fixed by the Executive Board of the subchapter, paid by the subchapter and issued through the International Union (see next section on "Bonding").
- (h) see that any financial reports required by the International are submitted to the International in accordance with the provisions in the International Union Constitution.

The Secretary-Treasurer's key duties include: submitting and reading a monthly financial statement to members at membership meetings; promptly transmitting the names and addresses of new members to International Headquarters so that they can receive their membership cards, the AFSCME magazine and retiree newsletter, and other membership mailings; countersigning all checks; and preparing an annual budget for membership approval.

The Secretary-Treasurer should never sign a blank check. If he or she must be away from the office or from membership meetings, the Vice President should be deputized to act in his or her stead.

## **Bonding**

The Constitution requires that all chapter and subchapter officers and employees be bonded through the International Union for no less than 10 percent of the assets handled by the organization annually. A \$2,500 bond is the minimum surety issued by the International Union. The chapter or subchapter's Secretary-Treasurer must notify the International Secretary-Treasurer (on forms provided) of the amount of the retiree organization's annual assets, which means the total amount of funds handled annually. The International Union then bills the chapter or subchapter for the cost of the bonding.

If the retiree group fails to submit a statement of its annual assets, the International Union will automatically bond it according to estimates of the amount of money handled by the chapter or subchapter annually. However, if only a minimum bond is issued, the chapter or subchapter will be liable for the loss of all funds exceeding the stated amount of the bond.

A Financial Standards Code, prepared by the International Secretary-Treasurer and adopted by the International Executive Board, establishes minimum standards for the keeping of financial records. Copies are included in the retiree chapter and subchapter charter kits.

## **The Recording Secretary**

### **The Recording Secretary shall:**

- (a) keep a record of the proceedings of all membership meetings and of all Executive Board meetings.
- (b) carry on the official correspondence of the organization, except when the Executive Board directs otherwise.
- (c) perform such other duties as the Executive Board may require.

### **The Minutes**

It is not necessary to write down every word that is said at a meeting—just keep a brief record of what happened. Write down who attended the Executive Board meeting or which officers attended the membership meeting, as the case may be; who presided at the meeting; what motions were made and who made them; and whether or not they were passed. A copy of the Secretary-Treasurer's report should be attached to the Recording Secretary's minutes and put on file. Correspondence and committee reports should be noted in the minutes but can be filed separately.

The Secretary should circulate an attendance form at each meeting for his or her records.

### **Official Correspondence**

Any correspondence that the Executive Board considers of sufficient importance, the Recording Secretary should read to the general membership meeting. Most communications, however, can be handled by the Executive Board, with the Board deciding how the Secretary should respond to them. The Secretary also writes letters and sends telegrams in the name of the chapter or subchapter, as requested by the membership.

## **The Executive Board Members**

The President, Vice President, Recording Secretary and Secretary-Treasurer—plus others elected by the membership as specified in each organization’s constitution—make up the Executive Board. The Executive Board’s functions are defined as follows:

The Executive Board shall be the governing body of the chapter or subchapter except when general membership meetings are in session. All matters affecting the policies and aims of the chapter or subchapter that are not specifically provided for in the organization’s constitution or by action of the membership at a regular or special meeting shall be decided by the Executive Board. The board shall meet at the call of the President or of a majority of the members of the Board. A majority of the members of the Executive Board shall be required for a quorum. A report on all actions taken by the Executive Board shall be made to the membership at the next general meeting.

The officers and members who make up the Executive Board are responsible for promoting the program and policies of the chapter or subchapter. If they work responsibly and closely together, the organization will grow and the membership will benefit. The central objective is to build a strong, effective retiree organization.

## **The Trustees**

The Trustees shall make or cause to be made, at least semi-annually, an audit of the finances of the chapter or subchapter, including the finances concerning any health and welfare, insurance or other membership benefit programs sponsored by the chapter or subchapter. It is also their responsibility to report to the membership on the results of the audit.

Because of the special nature of their duties, the Trustees are not members of the Executive Board. Their function is to guarantee

the members the protections described in the AFSCME Retirees Bill of Rights:

Members shall have the right to a full and clear accounting of all chapter and subchapter funds at all levels. Such accounting shall include, but not be limited to, periodic reports to the membership by the appropriate fiscal officers and periodic audit by officers elected for that purpose or by independent auditors not otherwise connected with the retiree organization.

The International Union recommends that Trustees be responsible for the annual audit and that they arrange for such an audit to be performed by a certified public accountant. Copies of the audit should be studied by the Executive Board and discussed at general meetings. A copy also should be sent to the International Secretary-Treasurer. All audits should look for the authorization of expenditures as well as the expenditures themselves.

## The Membership Meeting

The membership meeting is the heart of a democratic organization, and its decisions are the pulse of the retiree organization.

The strength of the chapter or subchapter is in direct proportion to the number of members who actively participate. One of the most important tasks of the leadership is to achieve the largest possible turnout and to make membership meetings sufficiently attractive and exciting to induce new members to come again.

### **A general membership meeting should do these things:**

- **Inform the members** of what is happening, what might happen, and why.
- **Make decisions** to guide the organization's activities and program and arrange to implement those decisions.
- **Build unity** within the retiree organization.



Planning is the key to a successful meeting. A carefully prepared agenda will ensure that the meeting starts on time, moves along smoothly, covers topics of interest to the majority of members and ends at a reasonable hour.

Planning will help the President estimate how much time will be needed for the Executive Board report, committee reports, old business or a special order of business such as election of officers. As a result, sufficient time will remain for an interesting program.

Chairing a membership meeting requires determination not to allow the proceedings to get bogged down on a single subject. The presiding officer should have a sound working knowledge of parliamentary rules and a willingness to use the gavel when necessary.

Here's a sample agenda for a successful membership meeting, followed by some helpful "Do's and Don'ts."

**Suggested Order of Business:**

1. President or chairperson of the meeting calls the meeting to order.
2. Roll call of officers.
3. Initiation of new members.
4. Reading of minutes.
5. Reading of important correspondence.
6. Report of officers.
7. Reports of committees.
8. Election of officers (when scheduled).
9. Unfinished business.
10. New business.
11. Program (guest speakers, general discussion, etc.).
12. Good and welfare.
13. Adjournment.
14. Social hour.

## Advance Notice of Meetings

**Do** give at least a week's advance notice of a meeting so that your members can plan ahead. A notice less than a week in advance increases the chance that you'll lose out to a doctor's appointment, family plans or a social engagement. Notify your members in more than one way: by mail (and e-mail) and phone in most cases. Remember that if nominations and elections are scheduled, not less than 15 days' notice by mail is required by the International Constitution.

**Don't** trust luck, memory or word-of-mouth. The fact that your meetings are held at the same time and place each month is no substitute for notices sent well in advance.

## Membership Meeting Place

**Do** make certain—whether your meeting place is a union hall or a church or a school auditorium—that there is nearby parking. Your meeting place should be large enough, bright, clean and well ventilated.

**Don't** risk a meeting place that is dingy, dirty, or too small.

## Pre-Meeting Arrangements

**Do** make sure there are enough chairs and relatively comfortable ones. You may want to serve coffee or soft drinks or snacks. The AFSCME army marches on its stomach.

**Do** have an amplifying system in good working order and at least one floor microphone if the hall is large enough to require it.

## Improve Your Program

**Do** consider ways to make your meeting interesting. There should be a topic of specific interest to retirees (such as pension or Social

Security changes, consumer issues, legislation, health care, crime prevention, political action, etc.) that's covered by a speaker at each meeting. This program should be publicized in the meeting notice.

## Committees

The more committees that are set up and actively maintained, the stronger the chapter or subchapter will become. That's because every member who is actively working on a committee begins to identify more closely with the organization. The work of the committees is also valuable in moving the organization ahead on its program.

There are two kinds of committees—standing and special. **Standing committees** keep operating because there is always a need for them. These include committees on organization, education, and political action. **Special committees** are appointed for a specific job and then are disbanded. Examples are a Labor Day picnic committee, an election committee or a volunteer committee for a special community service project.

The President appoints all committee members with the approval of the Executive Board. A wise President asks for volunteers and appoints them, along with some other members if necessary. The President chooses the most qualified for chairperson and then follows up to make sure the chairperson is working with the committee. But first the President makes certain there are enough members on the committee so everybody can do a fair share, rather than asking one or two to do all the work.

Everybody on the committee should be involved in the activity. All committees report to the Executive Board. They also should be prepared to report to the membership meeting. The chairperson of the committee, not the President, should report to the members so that they can see another fellow member working for the good of the organization.

Committee chairpersons should learn to **delegate responsibility**; they should not take on all the assignments themselves. The

chairperson holds the committee together and calls meetings regularly. People need to feel that they are part of something important. The shrewd chairperson will call all the members before a committee meeting to make sure they will be present and to let them know that their presence is needed.

The committee chairperson should attend all Executive Board and general membership meetings and be prepared to report to the Executive Board meeting, even if only to say that “the committee transacted no new business this month.” The chairperson should also be prepared to take the committee’s report to the general membership meeting, so that the members can know and approve of the committee members’ activity.

**Every chapter or subchapter will have different standing committees depending on its needs. Some of the more important committees are:**

### **Organizing Committee**

The Organizing Committee’s goal is to try to build 100 percent membership of all eligible retired public employees and their spouses in the chapter or subchapter jurisdiction. It conducts drives, trains volunteer organizers and constantly reminds the membership of the need to build the chapter or subchapter by bringing in new members.

Planning is the key to success in an organizing drive. A current list of retirees on the state, county or municipal pension rolls is the single best tool for locating and recruiting potential members. The parent retiree chapter or the appropriate union council(s) can assist subchapters in securing a copy of these lists, if available.

If a list is secured, the normal procedure is to discuss an organizing project with the chapter and International Union Retirees Department. A good option would be a mailing to all the retirees,

including a letter, application, and a pre-paid return envelope and dues checkoff card. When responses are received, the chapter will send the subchapter a list of the new members in that jurisdiction.

The Organizing Committee should then plan a special meeting to which the new members and their spouses are invited. The chapter, the appropriate union council(s), local union(s), and the AFSCME Retirees Department can assist the committee in planning this very important meeting.

If lists of retirees on the pension rolls are not available, the task of your committee becomes greater. The first step is to meet with the appropriate council or local union(s) in your area to determine if they have retained lists of past members who have retired. Be aware that the addresses and phone numbers on such a list may be outdated and should be verified in the regular or reverse phone book. Then proceed with a plan for an organizing mailing and the follow-up outlined earlier.

If the local unions have no list, the next step is for your committee to ask current members to compile a list of their former co-workers with whom they are still in contact.

As you are planning and implementing your organizing campaign, you may want to ensure that the spouses of eligible retirees will also be welcome. Most retired couples participate in activities together and can be encouraged to do so in AFSCME chapters and subchapters. Once a member, a spouse should be encouraged to remain a member in the event of the death of the retired public employee. This is especially important in the case of spouses who receive a survivor pension.

### **New Members Subcommittee**

The Organizing Committee should set up a New Members subcommittee or ask the President to name an independent committee to do this job. Ask someone in each local union in your area to be responsible for notifying you in advance of those who will

soon be retiring. Each person should receive a letter and, if possible, a call from a committee member, encouraging them to join the chapter or subchapter. Even if there is no initial interest, preserve the name and address for later contact.

## **PEOPLE Committee**

The PEOPLE (Public Employees Organized to Promote Legislative Equality) Committee is the chapter or subchapter's legislative and political arm. It is involved in political-campaign activity, membership education, and in reaching out to elected officials on key issues. It also raises voluntary contributions for political purposes. PEOPLE Committees work to promote fair treatment of public employees and public-employee retirees under federal and local law, to preserve and expand local public services, and to pursue other programs beneficial to working people, retirees and the general community. PEOPLE Committees work with other unions, public employee groups, and retiree groups, as well as consumer and community organizations, to achieve common goals.

## **Community Relations Committee**

The Community Relations Committee's job is to build and maintain a good relationship between the community and the chapter or subchapter. This means working in coalition with groups that share your concerns. It means getting involved in community issues such as civil rights, housing, crime prevention and education. The result of your participation will be the goodwill of the community toward your chapter, public-sector employees and retirees, and AFSCME.

## **Public Relations Committee**

It's important that this committee establish cordial relations with the media, i.e. the daily newspapers and the news departments of radio

and television stations. Public relations, or “PR,” is an ongoing job—not just a news release or phone call when your retiree group wants publicity for a particular event. Members of the Committee should get to know the city’s news reporters, especially those who cover senior citizen issues, health care and related concerns.

The Committee should make it a practice to send copies of all its press releases to the International’s Retirees Department, along with photos and any news clippings that describe the chapter’s or subchapter’s activities. This may be the only way the International will learn of these activities in order to publicize them in the *AFCSME Works* magazine and our retiree newsletter, *PrimeTime*.

## **Education Committee**

The Education Committee’s job is to keep the membership well-informed about the issues that affect retirees. A good education committee will plan a program for every membership meeting. It can arrange for speakers and films and plan discussions on topics of interest. It can also put together seminars and workshops.

The AFSCME Retirees Department can help your Education Committee plan and carry out these activities, as well as supply appropriate fact sheets and other materials.

## **Membership Welfare Committee**

The purpose of this committee is to provide aid and comfort to a member during periods of illness or personal crisis, and to the member’s family in case of his or her death. It could also promote a blood drive, or another service that all the members could use. This Committee can make a valuable contribution toward building a stronger retiree organization by uniting the members for the common good.

## **Election Committee**

The right of the member to fair, democratic election procedures in all instances where he or she votes to choose officials is guaranteed in the Retiree Bill of Rights. Basic regulations have been established for the conduct of elections for chapter and subchapter officers, convention delegates and others:

An Election Committee shall be established and shall have general responsibility for the conduct of an election in accordance with the chapter constitution and the constitution of the subchapter. Any challenge concerning the eligibility of any nominee shall be referred to the Election Committee for decision, and the decision shall be reported to the subchapter prior to the election. The Election Committee shall also report, as expeditiously as possible, the results of the balloting, together with recommendations regarding any protests which have been lodged regarding the conduct of the election. No member of the Election Committee may be a candidate for office.

*(Retiree Elections Code, Section II, Sub-section B, Retiree Election Manual).*

The Election Committee is normally a special committee.

[A guide to the entire election process is the Retiree Election Manual, which explains the requirements that must be met in conducting elections. This manual is included in the subchapter charter kit.]

## **Action Committee**

The Action Committee will organize and oversee specific projects that address the needs and interests of the membership, such as obtaining senior citizen discounts from local merchants and businesses.

This Committee should also be involved in organizing recreational activities. Picnics, day-trips, bowling leagues, etc., are some of the activities that can encourage participation.



The Action Committee should serve as an activities coordinator and not necessarily do all the work. Other chapter or subchapter members should be asked to offer their ideas for interesting projects and should be encouraged to volunteer their time and energy.

## Parliamentary Procedure

More than anyone else, the chairperson can make or break a meeting in the eyes of the membership. The chairperson must see to it that business is conducted both democratically and efficiently. Although the President chairs most meetings, it's important for other officers to know the ground rules so they can properly play their parts.

What about parliamentary rules? Are they necessary?

Rules-of-order make it possible to get business done in an organized and fair manner. Behind all the details of parliamentary procedure, there are four basic democratic principles:

1. The rules are the same for everybody. Every member has the same rights and the same limitations in the meeting.
2. The meeting can discuss only one topic at a time. This avoids confusion.
3. The majority rules.
4. The minority has a right to be heard. No matter how unpopular his or her opinion may be, each member has the right to speak.

The person chairing the meeting should ensure that these principles are followed.

## Handling Motions

The main way of conducting business during a meeting is “the motion.” A motion must be made, seconded, and then discussed. Once acted upon, the motion must be recorded in the minutes.

It is the chairperson’s responsibility to make sure that all business is put in motion form and that every motion is worded clearly so there is no doubt what the member intended. If the motion is vague or poorly stated, the chairperson should ask the member what he or she means. Then the chairperson rewords the motion, with the mover’s consent, and the Secretary records the motion in the minutes exactly as the chairperson states it.

This procedure applies to a main motion—a new item presented to the assembly for discussion and action. But there are a number of other types of motions, such as those to adjourn or table, which are handled somewhat differently. The chairperson should study a good book on parliamentary procedure, such as “Roberts Rules of Order,” to learn all the rules of the game.

Officers should have the constitutions of the chapter and subchapter open in front of them during union meetings, along with this section on Parliamentary Procedure.

## Applying Parliamentary Law

Anyone who has watched a good chairperson preside over a meeting realizes that there is more to it than knowledge of parliamentary law. Once the chairperson masters the parliamentary rules, there remain many decisions on how to apply them.

This calls for common sense. If the chairperson is too strict, members may feel they can’t talk freely. If he or she is too easy-going, the meeting may drag on without accomplishing anything.

In some retiree groups the members aren't familiar with parliamentary procedure and have to be educated gradually. So, the chair may want to loosely apply the rules.

In other groups, members know the ins and outs of parliamentary law and need a chairperson who is a stickler for the rules. This may be particularly important when there is a lot of controversy over an issue.

A good chairperson knows the membership and develops a sixth sense about what to do in the meeting. An excellent quick-reference chart on “Key Parliamentary Rules” can be found in the International Constitution.

## **Handling the Discussion**

Here are ways to handle some of the common problems chairpersons face:

- Make sure members get enough information to decide on any proposal. If it isn't clear, you can ask for more information from the person making a report, or you can summarize a speech or repeat a motion.
- If members are interested in what another member has to say, it may be best to let the member talk even if he or she is technically out of order.
- Keep a firm hand on a person who talks too much; establish and enforce a five-minute time limit if necessary.
- Tactfully educate members about parliamentary law—don't let it be used to confuse them.
- Don't just say, “You are out of order.” Explain how or when the member can make his or her point.

The purpose of the retiree meeting is to establish policies or decide on a general program. Details can be worked out by committees, who

can then make recommendations to the membership. If there is no relevant committee, suggest that one be set up.

Protect every member's right to speak, even if they hold an unpopular opinion. Remember—all sides have the right to be heard.

## How to Chair a Meeting

Here's a run-through of the proceedings of a "typical" chapter or subchapter meeting. Of course, no two meetings include the same activities, but this is an outline of how the President or chairperson might conduct one session.

- 1. Call to Order:** The chairperson starts the meeting by rapping the gavel and saying, "I hereby call this meeting to order." Wait for quiet—then begin the business of the meeting. Some groups may open their meetings with an ecumenical prayer, a pledge of allegiance to the flag or some other formal beginning.
- 2. Roll Call of Officers:** The chairperson says, "The Recording Secretary will call the roll of officers." The Recording Secretary should then call roll in a loud, clear voice—with pauses for response.
- 3. Initiation of New Members:** New members may simply be brought up front and introduced. But the chapter or subchapter may prefer to develop a ceremony for the induction of new members.
- 4. Reading of Minutes:** The chairperson continues: "The Secretary will read minutes of the last meeting." The Recording Secretary then reads the minutes of the last meeting in a loud, clear voice. The chairperson continues; "Are there any additions or

corrections to the minutes? (Pause) If not, the minutes will stand approved as read.” If there are corrections to the minutes ask for unanimous consent to additions or changes.

5. **Reading of Correspondence:** Letters requiring action by the membership should be discussed by the Executive Board prior to the meeting. At the meeting, they should be read aloud along with the Board’s recommendations for responses.
6. **Reports of Officers:** The chairperson reports on actions taken by the Executive Board at its last meeting and announces the agenda for this meeting. The Secretary-Treasurer’s report should be copied and distributed at the meeting. Each report should be followed by the chair’s call for “any objections,” or by motions from the floor to accept.
7. **Reports of Committees:** Committee reports may be heard from the PEOPLE Committee chairperson, Organizing Committee chairperson, or others. After each report, the chairperson asks, “You have heard the report of the... does the chair hear a motion to accept the report?”
8. **Unfinished Business:** Includes any items left over, or referred from a previous meeting, which require membership action. The chairperson asks, “Is there any unfinished business?” This may be followed by a motion from the floor dealing with specific items of unfinished business.
9. **New Business:** Includes items not raised at previous meetings and not necessarily included on the agenda, but which require membership action. The chairperson asks, “Is there any new business?” This also may be followed by a floor motion dealing with the specific item of new business.

- 10. Program:** A program of specific interest to retirees, involving a speaker and/or film should be developed for each meeting—preferably by the Election Committee.
- 11. Good and Welfare:** This part of the meeting gives the members a chance to discuss the general welfare of the organization. It may also be used for some planned activity, refreshments, acknowledgements, etc. The chairperson asks, “Is there any good and welfare?”
- 12. Adjourning the Meeting:** If the business of the meeting is finished, the chairperson asks, “Do I hear a motion to adjourn? A motion to adjourn must be seconded, and is then voted on without debate.





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