

OFFICERS GUIDE



**INTERNATIONAL ASSOCIATION OF
MACHINISTS AND AEROSPACE WORKERS**



**For Lodges in the
United States**

The Purpose of This Guide



A good local lodge begins with good leadership. Good leadership means officers who know their duties: presidents who understand how rules of order contribute to better meetings; recording secretaries who know how to keep minutes and handle correspondence; secretary-treasurers who understand the need for accurate and up-to-date records.

Good leadership means teamwork in planning meetings, staffing committees, making assignments, preparing reports and carrying out all the other duties required by a local lodge's negotiating, grievance handling, organizing, arbitration and legislative responsibilities.

The purpose of this guide is to build better IAM lodges by creating better understanding of leadership roles. It is designed not only to instruct new or prospective officers who may be uncertain as to what is expected, but also to provide reassurance and fresh insights to those who are more experienced.

It has been prepared in recognition that today's local lodge officers are tomorrow's district, state, provincial and national leaders.



Robert Martinez, Jr.
INTERNATIONAL PRESIDENT

Dora Cervantes
GENERAL SECRETARY-TREASURER

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The IAM Constitution is the final authority for lodge officers and the conduct of lodge business. Although this guide discusses duties of IAM officers and suggests ways to run an effective lodge, it cannot be a substitute for the rules and procedures laid down in the Constitution itself. In cases where this manual conflicts with the IAM Constitution, such as future action by a Grand Lodge Convention, the IAM Constitution will govern.

If there are questions regarding meaning or interpretation of the Constitution, IAM officers and members should write to the International President at Grand Lodge headquarters.

Local lodge officers need to study the Constitution carefully. The Constitution deals with many matters which will come up in the local lodge and which may not be included in this guide.

Chapter 1: Duties of Local Lodge Officers

This first section of the guide deals with the main duties of local lodge officers as set forth in the IAM Constitution. The IAM Constitution designates the President, Vice President, Secretary-Treasurer, Recording Secretary, Conductor-Sentinel and a board of three Trustees as the officers of a local lodge. Other key personnel of a local lodge designated by the IAM Constitution are the Communicator, Educator and Auditor positions.

Later sections discuss how to carry out these duties and how officers can cooperate to ensure an effective lodge.

The discussion of duties below is a summary. Officers should read over the Constitution and the local bylaws to make sure they understand their responsibilities.

Duties of the President

It is the President's responsibility as the chief executive officer to give leadership in the activities of the lodge. The way to accomplish this is to regard all the officers as a leadership team and see that regular meetings of the officers are held so that the problems and programs of the lodge are thoroughly discussed.

This will help the President carry out the responsibilities which are enumerated in Article C of the IAM Constitution.

Chairs Local Lodge Meetings

When the membership meeting is called to order, the President and the Executive Board

should have ready a prearranged agenda of business that they will bring up. They should have discussed major issues beforehand, and formulated their collective recommendations to the membership on what should be done.

In chairing the meeting, the President should act as the referee of the meeting, rather than a participant. The President must be fair and impartial during the meeting, letting everyone be heard and encouraging the lodge to make decisions democratically for the benefit of all.

Signs Vouchers and Checks

The President must make sure that all checks are properly drawn and that the bills being paid have been approved by the membership. All checks and all vouchers are signed by the President.

As chief executive officer of the lodge, the President is responsible for the constitutionality of every motion that is passed by the lodge. Any motion that would expend money unconstitutionally should be ruled out of order.

It should be noted that the Constitution gives the President double veto power over any expenditure that is illegal or unconstitutional. The President is required by the Constitution to countersign both the authorizing voucher and the check. By not signing either instrument, payment thereof can be stopped.

Appoints Communicator and Educator and Committees Not Otherwise Provided For

The President appoints the Communicator and Educator. The President also appoints all Committees except when the Constitution or bylaws provide that a Committee shall be selected some other way or when the membership decides to select a Committee in some other way.

Administers the Obligation to New Members

It is one of the President's duties to see that the obligation is administered to new members in keeping with the procedure set forth in the Ritual.

Enforces the Bylaws and Constitution

It has always been IAM constitutional law that the President of the lodge was responsible for enforcing the IAM Constitution applicable to local lodges and members. Under U.S. law, such as the Landrum Griffin Act, this duty is a legal responsibility as well.

In the U.S., the President is legally responsible for the faithful performance of his or her duties and is bonded for this purpose. Any act, or failure to act, may be the basis for a complaint to the Department of Labor by a dissatisfied member. As a result, it is important that the lodge have full and accurate minutes of the actions taken by the lodge during each meeting, so they can be referred to if there is disagreement.

While chairing the meeting, the President must help the Recording Secretary take accu-

rate minutes. The President is responsible for the correct wording of a motion. The intent of the mover should be clarified by the President, so that the person who made the motion and the President agree that the wording used expresses clearly what the mover intended to say.

A motion is not subject to debate until the President states the motion to the lodge. The manner in which it is stated to the lodge by the President is the manner in which it should be recorded in the minutes.

Duties of the Vice President

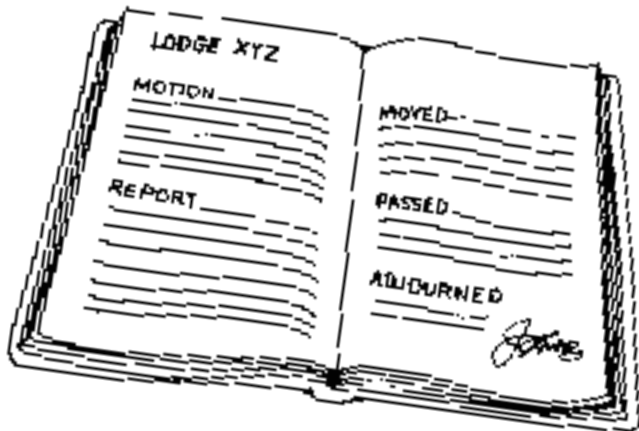
The Vice President is expected to assist the President and to be an active member of the officer group. The President should encourage and support full participation by the Vice President. One way to do this is to assign the Vice President responsibility for some committees. In addition, the IAM Constitution sets forth the following specific responsibilities:

- Chairs meetings when the President is absent.
- Helps keep order at meetings.
- Becomes President if the President dies, resigns or is removed, and serves for the remainder of the unexpired term, until after the next regular election and the installation of the new officers.
- Assumes duties of the President in his absence, as prescribed in the Constitution.
- Assumes the Chair at meetings on an appeal from the decision of the Chair.

Duties of the Recording Secretary

Conducts Correspondence for the Local Lodge

The Recording Secretary receives and conducts official correspondence. He or she must also keep orderly files.



Keeps Minutes of Meetings

The Recording Secretary must keep minutes of Executive Board meetings, regular lodge meetings and any special lodge meetings. Minutes are the **permanent record** of lodge activities. Minutes should be kept in approved minute books available from the IAM Purchasing Department (301) 967-4712.

The minutes of the meetings of a lodge should be an accurate record of every action of the lodge. This requires a high degree of cooperation between the person chairing the meeting and the Recording Secretary.

The wording of every motion should be recorded in the identical manner in which the President states the motion to the lodge, rather than the wording used by the mover. The name of every applicant for membership that is approved by the lodge should be so recorded in the minutes. Likewise, those that are presented but rejected or postponed for investigation should also be recorded. The lodge's

approval of Withdrawal Cards should be recorded in the minutes by name.

Presents Communications and Bills at the Meeting

The presentation of communications and bills to the lodge is the responsibility of the Recording Secretary.

Under the IAM Constitution the Recording Secretary is the officer who is charged with the responsibility of receiving and writing letters for the local lodge. Since the Recording Secretary is acting on behalf of the lodge at all times, he or she does not have the authority to file or dispose of a piece of correspondence until it has first been presented to the lodge. His or her constitutional duty is to present the correspondence to the lodge and let the lodge decide what to do about it.

In some cases the Recording Secretary can route the correspondence to a standing committee, such as the Education Committee or the Legislative Committee, with the understanding that the Committee will present the matter to the lodge in the Committee's report. Important letters should be discussed by the Executive Board and presented to the lodge with their recommendations or advice.

It is also the responsibility of the Recording Secretary to present all bills either in detail or summarized form. All bills should be recorded in the minutes of the meeting showing the lodge's disposition thereof. The authority for the payment of any bill should be clearly set forth in the local lodge minutes, giving the amount and to whom paid.

Prepares and Signs Vouchers

The Recording Secretary is the only officer of a lodge authorized to initiate the movement

of money. The Recording Secretary takes the minutes and the minutes are the record of authority to pay as voted by the lodge. Therefore, it is the Recording Secretary's duty, under the Constitution, to issue the vouchers which authorize the payment of bills.

Vouchers should be issued only when there is clear authority voted by the lodge and recorded in the minutes. Vouchers and bills are then given to the Secretary-Treasurer for payment.

The Recording Secretary prepares and signs all credentials of delegates to the Grand Lodge Convention and performs such other duties as are required by the IAM Constitution. These include but are not limited to specific responsibilities connected with Local Lodge-Grand Lodge officer election procedures.

Keeps the Seal of the Local

Papers, documents and vouchers of the lodge are valid only when they carry the seal of the lodge.

Duties of Secretary-Treasurer

The Secretary-Treasurer is the disbursing officer. The only authority for issuing a check is a properly executed voucher. A properly executed voucher is one that has been filled out showing the amount to be paid and to whom; it must be signed by the Recording Secretary and countersigned by the President, as well as bear the seal of the lodge.

The Secretary-Treasurer collects dues, fees and other income of the lodge. In the U.S., various laws govern the different rights and responsibilities of (1) union members, (2) agency fee payers, and (3) fee objectors. Detailed guidelines concerning these matters are set forth in various Official Circulars, with which the Secretary-Treasurer must be famil-

iar. Any specific questions should be directed to the General Secretary-Treasurer's office at IAM Headquarters.

- Receives all funds and deposits them in a bank of sound financial standing.
- Makes out and signs checks.
- Keeps an account of all receipts and disbursements and makes a report at the membership meeting.
- Keeps records of dues payments by each member and records of fee payments by each fee payer or objectors (if any).
- Sends per capita tax payment and a report on the members and fee payers or objectors (if any) to the IAM General Secretary-Treasurer each month.

The Secretary-Treasurer should refer to the IAM Financial Officers' Reference Manual for detailed information and guidance. (Available from the General Secretary-Treasurer).

Duties of the Conductor-Sentinel

- Checks to make sure that the people at the meeting are entitled to attend.
- Escorts visitors and new candidates in and out of lodge meeting.
- Guards the door of the lodge meeting and admits those entitled to attend.

Duties of the Trustees

- In charge of all property belonging to the lodge. The Trustees have the responsibility of making sure that the property of the lodge is maintained intact in accordance with the best interest of the union.
- Assist Auditing Committee in auditing the books and sign the reports.

Other Lodge Personnel Designated by the IAM Constitution

Duties of the Auditors

An Auditing Committee of three people is elected by the local lodge. They are nominated and elected at the same time and for the same three-year term as the Constitutional officers of the lodge. The Auditing Committee has the responsibility to see that the books and financial records are in proper order, that all receipts are properly entered, and that there is proper authorization and vouchers for all money paid out by the lodge.

The Auditing Committee's Duties are:

- Examine the books and accounts of the lodge. The IAM Constitution states that audits must be conducted semiannually, at the close of June and December. The three auditors are assisted by the Trustees.
- Report on the audit each time to the membership and to the Grand Lodge.

Duties of the Communicator

The local President shall appoint a Communicator, who in accordance with the official directives, policies, and programs of the Grand Lodge will use the latest forms of information technology to communicate with the local membership about their work and family lives. Contact the IAM Communications Department for information on setting up a Communicator program in your local lodge.

- Establish and maintain an e-mail address to receive electronic communications, alerts and bulletins from IAM Grand Lodge.
- Download and distribute IAM communications in the workplace and via group e-mail broadcast lists.

- Promote the IAM Microsite program as a no-cost option for any local or district lodge wishing to establish a basic website.
- Accept additional communications responsibilities as directed by local or district lodge President.

Duties of the Educator

The local President shall appoint an Educator to assist in carrying out the official directives, policies, and programs of the Grand Lodge and any other education and training programs approved by the Grand Lodge and related to educating and training the local membership on all issues affecting workers and their families. Contact the William W. Winpisinger Education and Technology Center (WWW) for information on setting up an Educator program in your local lodge.

The Educator's Duties are:

- Establish and maintain contact with the WWW Center.
- Provide periodic local training on issues identified by WWW Center.
- Work as directed by local and/or district officers to facilitate WWW Center training agenda.
- Familiarize members with available labor education resources.

Basic Tools for Officers

The Constitution of the IAM and the bylaws of the local lodge contain the basic laws of the union. Officers must live up to them and enforce them. One of the first things a new officer should do is to study them. Officers also should be thoroughly familiar with all current Official Circulars.

The Financial Officers Reference Manual has been published by the IAM General Secretary-Treasurer's office to aid the Secretary-Treasurer, Trustees and Auditors. It is an indispensable guide.

Every lodge should also have a copy of the Manual for Lodge Recording Secretaries. If your lodge does not have this, write for it. Manuals like this are part of the basic equipment of the lodge and should be passed on when new officers are elected.

To keep up to date, officers need to read the *IAM Journal*, which is published digitally every month. Go to www.goiam.org and follow links to the IAM APP which allow readers to view the *Journal* on tablets or smart phones, or download a PDF version that can be viewed online or printed. The *IAM Journal* contains news and stories on a variety of issues affecting the lives of working families.

iMail contains "fast breaking" news from inside and outside the IAM and is available to anyone who signs up for the service on the "iMail Signup" button on the IAM website (www.goiam.org). The IAM website (which is open to the public) contains a wide range of information on the union including the Machinists News Network featuring IAM-produced videos, breaking news, political information such as voting records and action alerts, press releases and the text of major speeches.

Every lodge should also take advantage of the many publications and resource materials from the departments at IAM Headquarters, such as educational materials for Human Rights, Legislative, Community Services and other lodge committees (see Chapter 4: Websites, Books and Resources).

The William W. Winpisinger Education and Technology Center maintains its own website (<http://winpisinger.iamaw.org>) where members can check class schedules and borrow CDs, videos and books from the Center's library via mail.

Certain local officers can also use VLodge.net (www.VLodge.net). VLodge.net is a service provided by Grand Lodge that provides information about what's happening in your local, district and territory; has an area for model contract language; has resources for your financial officer; has Official Circulars and has information on services available from the departments at Grand Lodge. Contact VLodge support at 301-967-3481 for information.

Other websites, books and pamphlets useful for lodge leadership are listed at the back of this guide.

KEEP UP TO DATE WITH A WIDE RANGE OF INFORMATION

HTTP://WINPISINGER.IAMAW.ORG



WWW.GOIAM.ORG



iMAIL



WWW.VLODGE.NET



Chapter 2: Carrying Out Your Duties

Chairing Meetings

In the IAM, the President chairs most meetings, but all the officers must know the ground rules of parliamentary procedure.

The person presiding can often make or break a meeting in the eyes of the membership. The Chair must see to it that business is conducted both democratically and efficiently. Generally the membership feels that every member has a right to talk, but they do not want the meeting to drag on.

The parliamentary procedure for IAM meetings is set forth in the Rules of Order in the IAM Constitution. With a few exceptions, these are the same as the usual Robert's Rules of Order. Any question not covered in the IAM Rules of Order is decided in accordance with Robert's Rules.

Why Use Parliamentary Rules of Order

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

- The rules are the same for everybody. Every member has the same rights and the same limitations in the meeting.
- The meeting can discuss only one thing at a time. This avoids confusion.
- The majority rules.

- The minority has a right to be heard. No matter how unpopular an opinion is, a member has the right to speak.
- The President, or the person chairing the meeting, should see that these democratic principles are carried out.

IAM Rules of Order

Officers should have the IAM Constitution or the IAM Ritual open in front of them during union meetings and use the IAM Rules of Order as their guide. The Chair should note these parliamentary points:

- Once a motion has been made and seconded, and discussion has begun, it is the property of the entire group. All members present decide what to do with it. This means that once a motion has been debated it cannot be withdrawn except by majority vote of the members present.
- A vote cannot be taken on a motion just because some member calls out "Question!" (If this were allowed, one member alone could stop discussion). The only way in which a member can bring a motion to a vote is to rise, be recognized by the Chair and say, "I move the previous question." This motion means "I move we end discussion and take a vote." Such a motion must be passed by a two-thirds vote, and then the Chair takes the vote on the main motion.

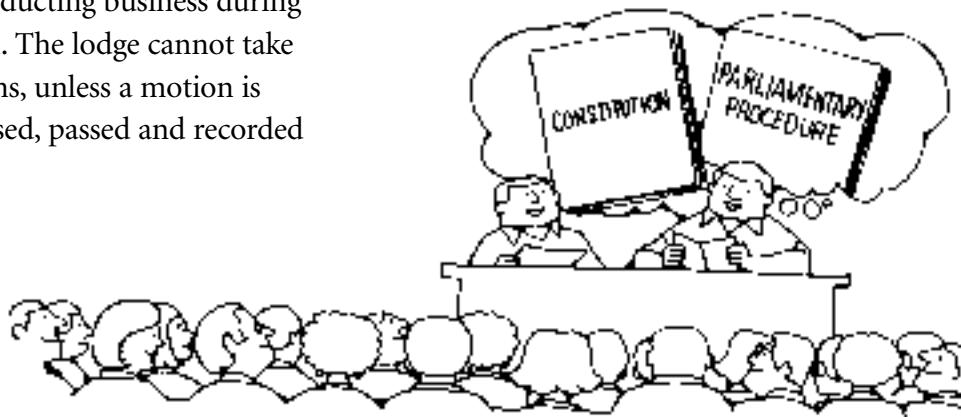
- The Chair may suggest that discussion be ended by saying “If there is no further discussion, we will take a vote.” However, if any member objects and wishes to continue discussion, the Chair must do so.
- A “yes” vote on an amendment does not automatically carry the motion. A separate vote must always be taken on the main motion as amended. It cannot be assumed that a member who votes in favor of an amendment is necessarily in favor of the original motion.
- IAM Rules state that the regular order of business at a meeting may be suspended by a motion passed by two-thirds vote. By suspending the regular order of business, the lodge can schedule an invited speaker for a definite time.

It is the responsibility of the Chair to make sure that every motion is worded clearly so that there is no doubt what the member intended by his motion. If the motion is vague, or poorly stated, the President should ask the person what the motion means. Then the Chair re-words the motion, with the mover’s consent, and the Secretary records the re-worded motion in the minutes.

The procedure for handling a main motion is illustrated below. This procedure applies to a main motion, but there are a number of other types of motions (to adjourn, to table) which are handled somewhat differently. Presiding officers should study a good book on parliamentary law (see book list at the back of this Guide).

Handling Motions

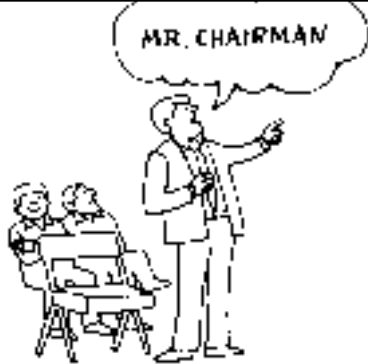
The main way of conducting business during a meeting is the motion. The lodge cannot take action, or make decisions, unless a motion is made, seconded, discussed, passed and recorded in the minutes.



USE THE IAM CONSTITUTION AND IAM RULES OF ORDER AS GUIDES

HANDLING MOTIONS

1. RECOGNITION



2. MAKING A MOTION



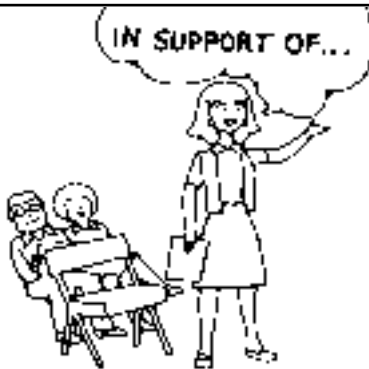
3. SECONDING



4. STATING THE MOTION



5. DISCUSSION



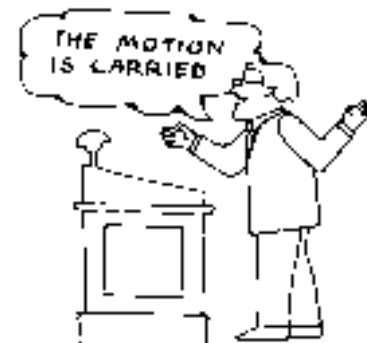
6. RESTATING THE MOTION



7. VOTING



8. ANNOUNCING THE RESULT



Coordination at Meetings

A smooth-running meeting requires the coordination of all the officers. Each one must be prepared to take part without fumbling or shuffling papers. In a well-run lodge, the officers meet beforehand to work out a detailed agenda.

Applying Parliamentary Law in the Union Meeting

Anyone who has watched a good Chairperson preside over a meeting realizes that there is more to it than knowledge of parliamentary procedure. Even when a person has mastered the parliamentary rules, there are still many decisions that have to be made on how to apply them.

This calls for common sense. If the presiding officer is too technical, the members may feel that they are being cut off, not allowed to talk. If he or she is too easy going, the membership may get restless because they think nothing is being accomplished. A good Chairperson has a sixth sense of the way the membership is reacting and guides the meeting accordingly.

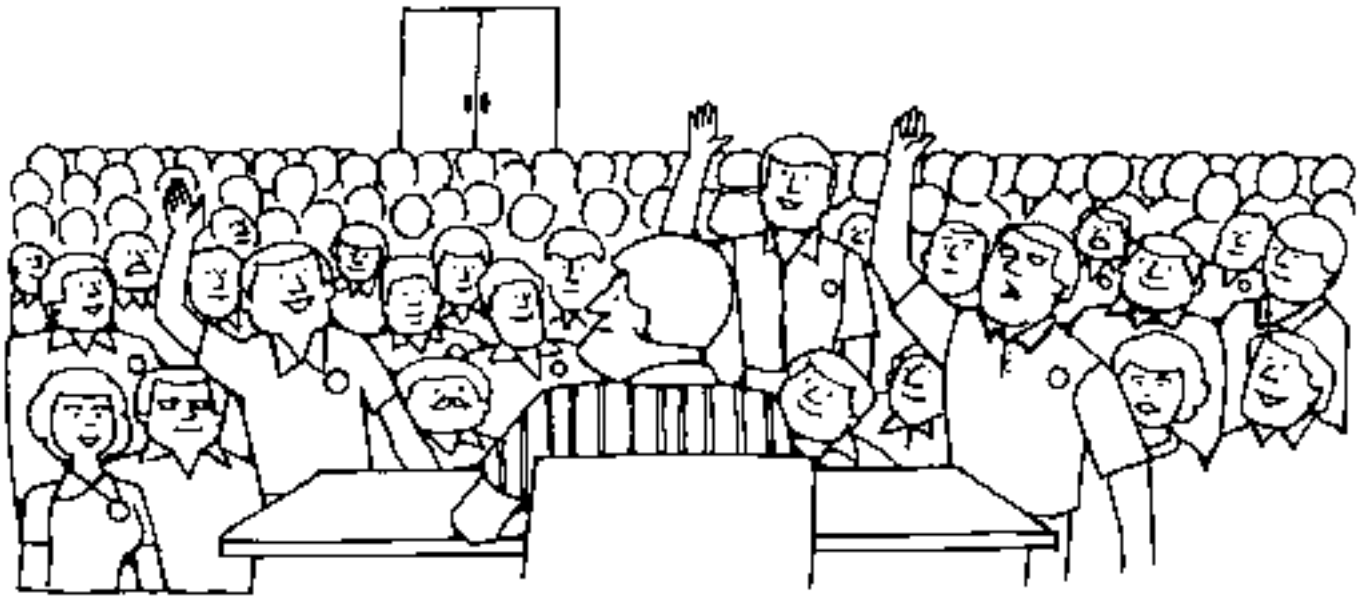
Lodges vary in the kind of Chairperson they need. There are lodges where most members do not know parliamentary procedure and it is up to the Chair to help them and educate them gradually. In other lodges, members know the ins-and-outs of parliamentary law and use this knowledge. Here you need a Chairperson who follows the rules.

In any situation where there is a controversial issue, or where there is a sharp division of opinion, the presiding officer must be careful to see that motions, discussion and voting follow proper parliamentary procedure and the IAM Constitution. This will keep dissatisfied members from questioning lodge actions after the meeting.

Handling Discussion

There are a number of common problems that crop up in meetings. Here are suggestions to handle them.

- Make sure members get enough information to decide on any proposal. If it isn't clear, ask for more information from the person making a report, summarize a speech or repeat a motion.
- If members are interested in what another member says, it is often best to let that member talk, even if you feel they are technically out of order.
- Keep a firm hand on the person who always talks too much — enforce the IAM rule on the 5-minute time limit.
- 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 could make a point.
- The purpose of the meeting is to establish a policy or decide on a general program. Refer details to Committees for a recommendation. If there is no Committee, suggest that one be set up.
- Protect every member's right to speak, even if the person has an unpopular opinion.



PROTECT EVERY MEMBER'S RIGHT TO SPEAK

Keeping Minutes

The minutes of the lodge are the **permanent record** of the activities and the official actions of the lodge. The President and the Recording Secretary must cooperate during the meeting so that minutes are accurate.

Minutes must show clearly what business was brought up in the meeting and what action the members took on it.

If a question comes up later, the lodge should be able to refer to the minutes and find out what the members decided. For this reason, the Secretary must get the exact wording of each motion.

When the minutes are read, they remind the members what happened at the last meeting and what remains to be done. The Secretary should use as few words as possible, but put in enough detail so that the member who missed a meeting will understand what took place.

Make minutes brief. Emphasize what was done and decided at the meeting, not what was said. The IAM Manual for Lodge Recording Secretaries gives additional details on keeping minutes.

Good Minutes Contain the Following:

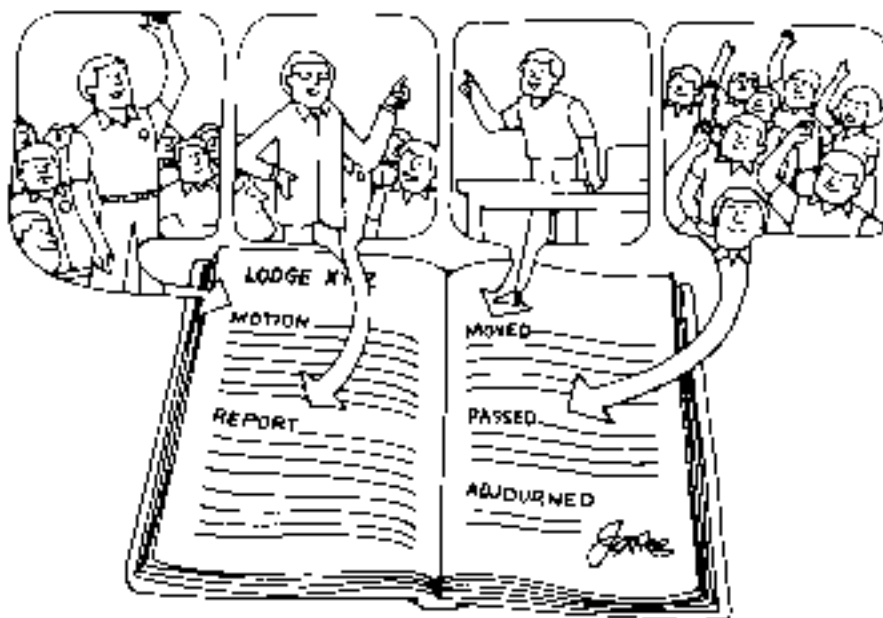
- Name and number of the lodge; date, time and place of the meeting.
- Name of the President or presiding officer of the meeting. Roll call of officers with absentees noted.

- Applications and names of new members initiated.
- Action taken on minutes of last meeting.
- Communications and action taken on them.
- Bills and action taken to approve or disapprove.
- Brief summary of reports and recommendations of Committees, delegates, and officers. Show what action was taken on the report, if any.
- Receipts and disbursements since the last meeting, as reported by the Secretary-Treasurer. This report should show cash balance on hand.
- The wording of every motion and the action taken on it must be recorded. The names of the members who made and seconded the motion should also be set down in the minutes. If the voting on motion is counted (ballot, roll call or count of hands), the minutes should show the exact count for and against.

Where to Keep Minutes

IAM bound Minute Books may be bought from the IAM Purchasing Department (301) 967-4712. The official lodge copy of the minutes should always be signed by the Recording Secretary.

THE SECRETARY MUST GET THE EXACT WORDING



Correcting Minutes

Occasionally, a correction or addition to the minutes is made at the next meeting. The correction should be written in full on the last page of the minutes which require changing. It

is not proper to erase in the minutes. The Secretary signs the correction with his or her initials.

The sample minutes on the next page show how to write up minutes.

SAMPLE MINUTES

MINUTES

Lodge 6011, International Association of Machinists
Membership Meeting, March 10, 20XX

The regular meeting of Lodge 6011 was called to order at 8:05 p.m. in the union hall by President Romano and opened in due form.

On the roll call of officers, all were present except Vice President Mary Timmons.

Applications: The Committee reported applications from William Hunt, Joseph Novick and Barbara Johnson, and recommended acceptance. A motion by Barry, seconded by Raul, to accept the applications was passed. President Romano gave them the IAM Obligation.

Minutes: The minutes of the last meeting were read and approved.

Visitors: The lodge welcomed Josephine Manning from Lodge 7235.

Financial Report: The Secretary-Treasurer reported that the balance on hand at the close of the last meeting was \$39,243.15 with receipts of \$16,600.00 and disbursements of \$13,300.00, leaving a present balance of \$42,543.15.

Communications: The Secretary read a letter from the Central Labor Council asking support for the IAM members on strike at Jackson Machine Works. On motion by Strickland, seconded by Toland, the lodge voted to donate \$50 and to encourage volunteers to join a picket line.

Bills: The following regular bills were read: per-capita to District, \$1,690; per-capita to Grand Lodge, \$2,940; Bay Phone Company, \$409.11; rent of hall, \$400. New bills were presented and approved as follows, John Romano (lost time, \$35.40), Sally Polk (lost time, \$67.50), Mario's Bakery (\$8.90).

Reports: Business Representative Jamison reported on the strike at Miller Motor Company and the upgrading grievance in the Machine Shop. The Education Committee Chairperson reported on a letter regarding Machinists Leadership Schools this summer. A motion by Higgins, seconded by Jones was passed to send two members to the William W. Winpisinger Education and Technology Center in May with lost time and expenses.

Delegate James Glover reported on the last meeting of the District, and urged members to send postcards to Senators on Senate bill 671.

The Executive Board report was given by Recording Secretary Perez. It was recommended that the lodge register a Human Rights Chairperson with the Grand Lodge Women's and Human Rights Department. Motion by Recording Secretary Perez, seconded by Jones to concur with the recommendation of the Executive Board. Motion passed.

Unfinished business: Jones moved, seconded by Hernandez, that the lodge buy the new computer reported on at the last meeting, for \$1,700. Motion passed.

Report on Organizing Activities: Organizing Committee Chairperson Susan Sands reported on the organizing campaign at XYZ Company and asked for volunteers for housecalling next month.

Good and Welfare: None

New business: On motion by Marlin, seconded by Higgins, the Lodge voted to set up a Community Services Committee, to be appointed by the President.

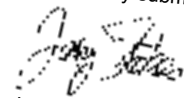
A motion was made by Rogers, seconded by Glover, to take part in Career Day at Highland High School. An amendment by Marlow, seconded by Jennings, to pay lost time to two lodge officers for this day passed. Motion as amended was passed.

Sick and Disabled Members and Relief Committee: None

Members Out of Work and Positions Vacant: None

The meeting adjourned at 9:15 p.m.

Respectfully submitted,



Jerry Stokes
Recording Secretary

Minutes should be recorded in approved minute books
available from the IAM Purchasing Department (301) 967-4712.

Handling Bills

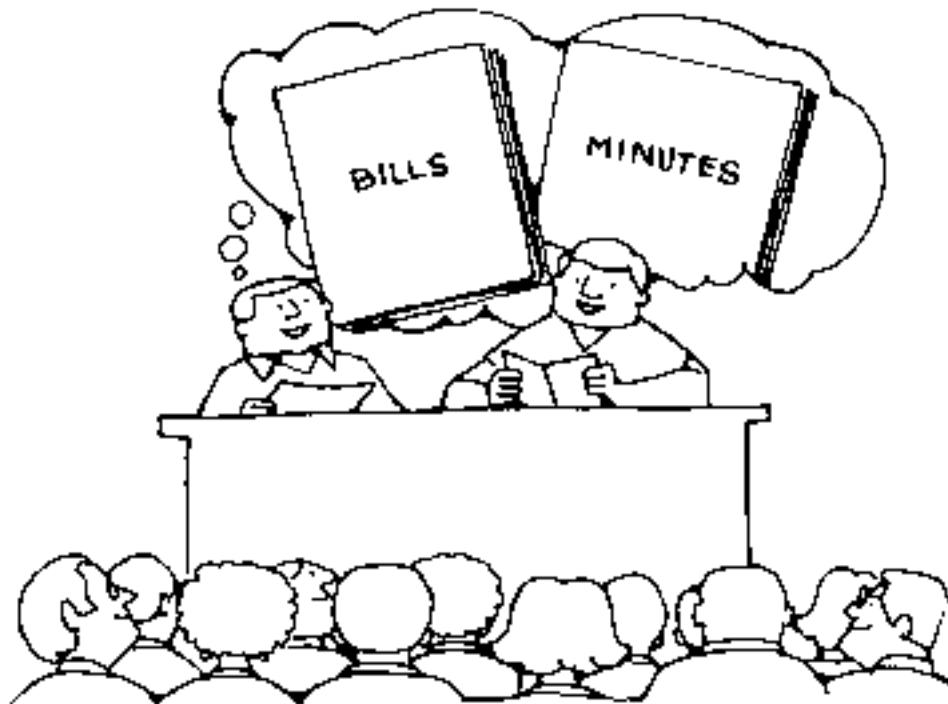
All bills must be presented at the lodge meeting. The minutes must show the amount of the bill and to whom it is to be paid. The IAM Constitution, as well as civil laws, makes this essential. This procedure also keeps members informed about lodge finances so that they can make intelligent judgments.

Bills, such as Grand Lodge and District Lodge per capita taxes and withholding taxes, are authorized by the IAM Constitution. Office rent or recurring monthly bills can be authorized for payment by membership action or bylaws. Any salaries to be paid must be in

the local or district bylaws. These payments must be read to the members for their information, even though they do not require approval again.

All other bills must be presented for authorization. The minutes must show whether they were approved or disapproved.

When payment of a bill has been approved, the Recording Secretary signs a master voucher and places the seal of the lodge on it. Master voucher forms are available from the IAM Purchasing Department (301) 967-4712 and on www.VLodge.net.



**THE MINUTES MUST SHOW AMOUNT OF ALL
BILLS AND TO WHOM IT IS TO BE PAID**

Handling Letters

Most letters directed to the local lodge are sent to the Recording Secretary. These letters are for the information of all the officers and the membership, not just the Secretary. It is the Secretary's job to:

- Open letters when received and “route” them to the officers or heads of Committees, when appropriate.
- Prepare the correspondence to be read at the meeting.
- Answer letters as directed by the lodge.
- This Guide summarizes major points on proper handling of correspondence for the benefit of all the officers and committees. However, Recording Secretaries should use the IAM Manual for Lodge Recording Secretaries for details.

Route Letters to the Proper Person

Letters should not sit around unread, waiting for the next membership meeting. The officers, particularly the President, should be informed about all important correspondence when it is received.

When a letter deals with a subject that is the responsibility of a Committee, that letter should usually be passed on to the Committee Chairperson.

For example, suppose the Secretary receives a letter announcing a new pamphlet on occupational health and safety, it should go promptly to the Safety and Health Committee. At the next meeting of the lodge, the Committee can make a recommendation on the pamphlet if they feel it is useful. This is a more efficient way of handling letters than having the Recording Secretary read all of them at the meeting.

Go Over Letters Before the Meeting

Before each meeting, the officers should go over the letters so that they know what is coming up. A good time to do this is at the Officers' or Executive Board meeting which plans the agenda for the meeting.

In some lodges, the Executive Board makes recommendations for action on important letters. These recommendations guide the membership, but the members make the final decision.

Handling Letters During the Meeting

Since the membership has the right to know whatever concerns the lodge, every letter of any importance should be presented to the membership.

Official Circulars from the IAM and letters from Grand Lodge must be read in full.

However, it is not necessary for the Secretary to read every letter, word for word. Many letters can be summarized, or read in part.

For example, the Secretary might say, “This letter asks our members to boycott the products of a non-union firm. I will read the paragraph which explains why this company has been placed on the unfair list.”

If the letter calls for action on the part of the lodge, the President would ask, “Is there a motion on this letter?”

It is quite proper for the membership to take action on a letter at the time it is read. This saves time. In some lodges it is customary for action to be postponed to “new business,” but this is not necessary.

THE RECORDING SECRETARY PREPARES THE CORRESPONDENCE TO BE READ AT THE MEETING



It is a good rule to act on most letters right away. Postpone only those letters which involve a complicated or controversial piece of business.

Tips for Writing Lodge Letters

Before writing a letter, decide what you want to say. Often it takes thought to get the situation clear in your mind and to organize your ideas. This is the first step.

Keep the Following Points In Mind:

- Stick to one subject in a letter.
- In the first paragraph, state the subject of the letter and the purpose for writing it.
- The next paragraphs should explain the important facts or information. Remember that the person who will get the letter does not know as much as you do about the problem or the lodge. Tell the necessary facts.
- Use common, everyday language and short sentences. This will make your meaning clear.
- Always include your name and title in the lodge, the lodge number and the address to which you want the reply sent.
- Keep a copy of all important lodge correspondence.

Writing Your Legislator

When you write your Congressperson, Senator or Member of Parliament:

- Be specific on the name of the bill and your position on it. (“We support...” or “We are opposed to...”)
- Tell why you favor or oppose the bill. Use examples from the experience of the lodge or the people you know.
- Ask your representative to let you know how he or she stands. A vague answer usually means they don’t agree with you.
- Be polite. Don’t threaten. Always sign your name and address.

SAMPLE LETTER

Honorable James Jones
House of Representatives
Washington DC 20515

Dear Congressman Jones,

We urge you to support the tax bill (H.R. 0000) which would raise the personal exemption under the federal income tax from the current \$600 to \$1,000 for each person in the family.

Our lodge has discussed this bill. We believe that the long frozen personal exemption should be brought up to date in line with today’s cost of living.

As citizens, we working people want to pay our fair share of the taxes to carry on the necessary operations of our government. The idea of a progressive income tax provides for a fair distribution of the tax burden. However, over the past 30 years the relative burden of taxation has been steadily shifted from those most able to pay to those of us in the middle and lower income brackets.

We feel that the minimum amount of income needed for a decent standard of living should not be taxed.

We hope you will vote for the new personal exemption and would appreciate knowing how you stand on it.

Very truly yours,

Mary Reed
Recording Secretary
IAM Lodge 5912

Encourage Your Members to Write

Legislators listen when individuals send them a letter or a postcard. Get your members to write — even a few sentences will show their representatives that they care. Tell members to make it short — don't worry about spelling — and sign their name and address.

Letters to such people can be closed with Very truly yours, Sincerely yours, or Respectfully yours.

A good style handbook will show the proper way to address people with other special titles.

PROPER FORMS OF ADDRESS

U.S. Senators

Hon. John Jones
United States Senate
Washington, DC 20510

Dear Senator Jones:

U.S. Representatives

Hon. Jane Smith
House of Representatives
Washington, DC 20515

Dear Representative Smith:

State Officials

Hon. William Brown
Governor of Oklahoma
Oklahoma City, Oklahoma

Dear Governor Brown:

City Officials

Hon. George Miller
Mayor of Newtown
City Hall
Newtown, Indiana

Dear Mayor Miller:

Member of House of Commons (Canada)

Mr. Joseph White, M. P.
House of Commons
Ottawa, Ontario

Dear Mr. White:

Cabinet Minister (Canada)

The Hon. Gordon Williams, M. P.
Minister of _____
House of Commons
Ottawa, Ontario

Dear Mr. Minister:

Letters can be closed with Very truly yours, Sincerely yours, or Respectfully yours.

Contacting Legislators by E-mail

Handwritten letters are still the most effective way to contact your legislators, but e-mail is easier for many members to send a message. The Politics and Legislation page of www.goiam.org has an easy-to-use section

where U.S. members can find their members of Congress, state legislators and local elected officials just by entering their zip code. There are pre-written “action-alerts” from the IAM Legislative Department on important issues and members can compose their own message.

WWW.GOIAM.ORG



Choose an issue to send a message to your legislators.

To send an e-mail to your legislator at the federal, state or local level, click on “IAM Activist Center” on the home page of www.goiam.org.

Filing and Recordkeeping

A union, like any well-run organization, must keep records, so that the officers can check back on past events and actions. There are also civil laws, such as the Landrum-Griffin Act in the United States, which require that pertinent records be kept.

Among the vital records, which must be filed, are:

- Minutes of all Executive Board, regular and special lodge meetings are **permanent records** of the lodge and must not be discarded.
- Financial records (This is largely the responsibility of the Secretary-Treasurer, but the Recording Secretary will have copies of vouchers).
- Ballots and election records (Keep for at least one year. See the IAM Constitution for details).
- Correspondence.
- The Recording Secretary is responsible for correspondence files. Set up files for:
 - All correspondence dealing with lodge business. Letters received by the lodge should be filed, as well as copies of all letters written by the Recording Secretary.
 - Official Circulars and policy letters issued by the Grand Lodge.
 - Letters issued by the Territorial office and the District Lodge office.

All correspondence and records are the property of the lodge. When an officer goes out of office, he or she must immediately give files and records to the new officers.

Files for Bargaining

A file of written grievances will help the lodge determine precedents and show trouble spots in the contract. This type of file may be kept by the date the grievance was written, or by the subject of the grievance — a file on seniority grievances, a file on overtime grievances, discrimination grievances, and so on.

Other materials that should be filed because they may come in handy in dealing with the company are: 1) records and briefs on arbitration cases; 2) minutes of grievance meetings; 3) company notices or posters on hours, vacations, policy changes; and 4) reports published by the company or news media on the insurance plan, pension plan, profits, etc.

Committee Files

A good Committee Chairperson keeps a file of information that will help the Committee on its work — newspaper clippings, pamphlets, bulletins from the union, and similar material.

Records of Committee activities should also be kept for a year or so — files of local lodge newspapers, handbills, publicity releases to newspapers, letters to Congress, and similar papers — are a reference if any question arises. The Committee can also use them to check back from time to time to see how they are doing.

Making Reports

Everyone is familiar with the delegate who gets up in the union meeting and reports that: “I went to the Council meeting and they had a lot of interesting speeches and I wish you all could have been there.”

A report like this does not tell the membership anything. Equally bad, however, is the delegate who insists on reporting every speech and every resolution in detail for an hour.

Reports from delegates, committees and officers should hit the high-spots and help “educate” the membership so that they know more about what’s going on in the union.

To do this, reports must be thought out beforehand.

Organize your report before the meeting. Make notes in order to cover all the important points in the proper order. Preparing notes will also help you keep the report brief.

Reports from Delegates and Committees

Delegates to the District, the State Council, union schools, the city labor body and other labor meetings are representatives of the lodge. One of their duties is to keep the lodge informed of what is going on that is important to the members.

Effective Speaking Principle	Application
Know what you want to say.	Be prepared beforehand. Make notes.
Say it so people understand.	Explain points they don’t know as much about as you do.
Make it interesting.	Look at it from the members’ angle. How will this help or hurt them?
Say it so they take action.	Tell them what needs to be done and why.



REPORTS SHOULD TELL WHAT’S GOING ON - BUT NOT FOREVER

However, a delegate does not have to report on every resolution or every speaker. This gets dull.

A delegate’s report should include:

- Resolutions or motions passed that are important to your membership.
- News or information received at the meeting which your members should know about. This might be strikes, current bills in the legislature, organizing drives, community problems, etc.
- If there is some action that the lodge is supposed to take, say so.

Committee reports usually follow a different pattern. The Chairperson should tell what the Committee is doing, what their future plans are and what action they recommend that the lodge take. Always explain why the Committee recommends any action, and how it will benefit the members and the lodge.

Special Treatment for Reports

Important reports, such as the report on an IAM Convention, will be more interesting if you give them special treatment. Have several people give parts of the report — two faces are more interesting than one. Or use a question-and-answer session with one delegate asking questions of the others. Agree on the questions beforehand and encourage members to ask some also.

Auditing

The Auditors and the Trustees are the membership's watchdog on finances. They check the lodge's finances and give members a complete financial report.

The IAM Constitution states that audits must be conducted semiannually, at the close of June and December. The three Auditors and the three Trustees have the following responsibilities:

- Make a thorough audit of all financial and membership records of the lodge.
- This means: checking the per capita tax records sent to Grand Lodge against the receipts records and the individual membership or agency records, checking bank deposits, monthly bank statements and canceled checks; checking bills against the checks drawn to pay them; reading lodge minutes to make sure that all bills and expenditures were properly authorized by

the membership. The Auditors' task includes auditing all supplemental lodge accounts, such as emergency funds, savings accounts, U.S. bonds, reserve funds and building funds.

- Report the Committee's findings to the local lodge membership at the next meeting. This is done on a form provided by the IAM General Secretary-Treasurer.
- The Committee can read the report in full or read a summary of receipts, expenses, assets and liabilities, depending on the wishes of the membership. The Committee should be ready, willing and able to answer any questions about the report — members have a democratic right to full information on the union's finances.
- Report to the Grand Lodge on the proper form.

Advice to the Lodge

It is also the responsibility of the Auditors and the Trustees to make any necessary recommendations to the lodge that are indicated by the audit. For example, if the lodge is spending more money than it is receiving, the Committee should inform the membership of this.

The Auditors should make recommendations to the membership when necessary, but they cannot tell the membership how to spend lodge money. For example, suppose the membership has voted to spend \$400 for an organizing campaign. It is not the Auditing Committee's responsibility to question the campaign. The Committee's job is to check the records to see that the \$400 was spent for the campaign (and not some other lodge activity). They also check to see that there are bills for each item of organizing expenses paid out of the \$400.

Election of Auditors

The IAM Constitution requires that the local lodge nominate and elect an Auditing Committee of three people. They are nominated and elected at the same time and for the same term as the Constitutional officers.

Officers cannot serve on the Auditing Committee, because it is designed to serve as an impartial, outside check on the finances and bookkeeping practices of the lodge. None of the officers, from President to Conductor-Sentinel, and no Business Representative, may serve as a local lodge Auditor.

Trustees

Under the IAM Constitution, each local lodge elects three Trustees. They are elected at the same time, in the same manner, as the other lodge officers, and for the same term of office.

The Trustees have charge of all property of the local lodge. If the lodge owns furniture or office equipment such as computers, printers, copy

machines, cell phones or other electronic equipment, the Trustees are responsible for maintaining records of all property and for seeing that it is kept in good repair, although other officers may be assigned to use this property.

Trustees are also responsible for seeing that financial records and books are properly kept. As part of this duty, they are expected to assist the Auditing Committee and verify the Committee's report by signing it.

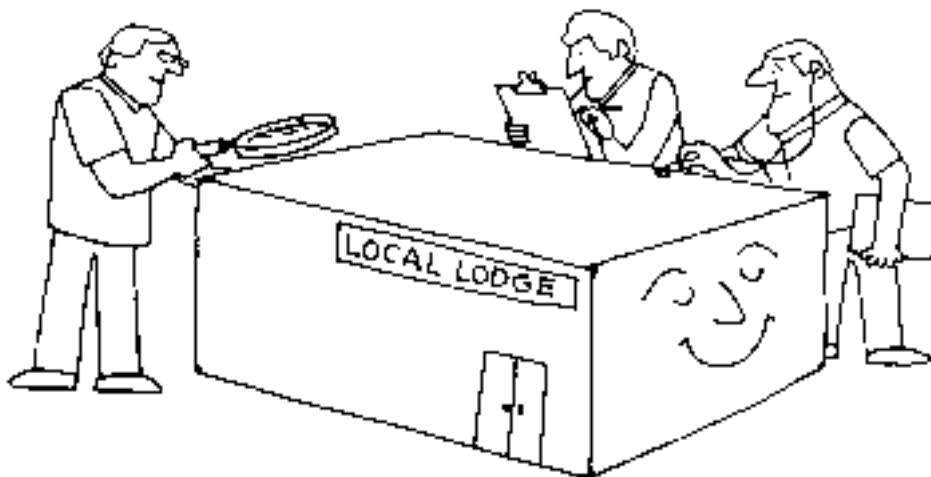
The Trustees should make sure that savings bonds, securities, and lodge documents are kept in a place safe from fire or theft.

Trustees are responsible to the Grand Lodge for all funds or property under their control.

Many of the Trustees' duties outlined above are also obligations of the other lodge officers. For example, the President, Recording Secretary, and Secretary-Treasurer all share responsibility for seeing that books and finances are properly handled.

The Trustees are an added safeguard.

THE AUDITING COMMITTEE GIVES THE LODGE REGULAR CHECK-UPS



Chapter 3:

Running an Effective Lodge

Previous sections of the Guide have concentrated on the special responsibilities of each officer. This section, however, deals with the total program of the lodge — activities which will be successful only if all the officers work together.

The officers, as a group, provide the leadership for good union meetings, active stewards and committees, and a lodge program which serves and involves union members. This section of the Guide suggests how to go about:

- Holding Officers' Meetings
- Determining a Program for the Lodge
- Keeping Committees Active
- Running Better Union Meetings
- Making the Most of Your Stewards System
- Handling Finances
- Working Within the IAM and other Labor Groups
- Political Action
- Organizing
- Political and Legislative Action

All these activities add up to a big job. The officers cannot do it alone, but they can provide guidance, coordination, and encouragement.

Officers' Meetings

Good union leadership takes teamwork — all the officers must work together, along with the heads of committees. The best way to do this is to hold regular meetings of officers and key leadership once or twice a month. When people talk face to face, they iron out their differences and get things done.

Officers' meetings (usually called Executive Board meetings) are set up to do the following:

- Keep everyone informed — each person reports what they are doing.
- Consider major problems coming up in the lodge and figure out solutions.
- Look at membership needs, set up new programs.
- Discuss what is coming up at the membership meeting and what items will be on the agenda.

In some IAM lodges, only the officers meet. Other lodges have additional Executive Board members, elected separately under their bylaws. You may want to invite others, such as the Communicator or Educator, who may attend and have a voice but no vote. Committee Chairpersons may want to report on special projects and other committee activities.

The Executive Board or officers' meetings can make recommendations at the lodge meeting. Sometimes they review the correspondence and recommend action on letters or problems. They do not have the power to make final decisions on important matters, however. Their recommendations must be approved by the membership meeting.

In some lodges, the Recording Secretary takes minutes at the Executive Board meeting. This is helpful in cases where the Board makes recommendations to the lodge. The Recording Secretary reads off the recommendations at the meeting, before the membership votes.

The President and other officers need to set up an informal communications network that keeps them in touch between officers' meetings. Touch base with heads of Committees and other officers at breaks, lunch, in the shop or the office. Many questions and problems can be nipped in the bud that way.

Determining a Program for the Lodge

As the lodge leadership, officers must ask themselves "What do we need to be doing? What new problems do we have at work with the employer? How can we help our members more? How could we make the union stronger?"

In any organization, the leaders have a responsibility to look ahead for the welfare of the members and the organization. Times change. Sometimes the lodge needs to start something new. Sometimes officers need to beef up a program that has gone downhill. They must set the direction and fix the priorities for the coming year.

Where bargaining and grievance handling are concerned, most lodges do this automatically. There is continual discussion of major issues and what to do about them. Similarly, in other areas of lodge activity, officers should take a hard look at the lodge and ask themselves. "What next?"

Do all the men and women under your contract belong to the Union?

We need to keep "organizing" in our own shops. In the United States, even if you have a security clause in your contract, the law allows represented employees to pay a fee instead of joining the Union and paying dues. Fee payers can also have their fees reduced by the percentage that the IAM spends on activities that the courts say are not directly related to representation, like organizing, working for the passage of better laws, supporting our communities (local churches, food programs, disaster relief or the Scouts), or working with other labor organizations.

It is crucial for you to obtain "New Member Kits" from Headquarters and to have a day-to-day program to greet new hires and tell them about the advantages of full Union membership — voting on contracts, participating in lodge meetings and programs, running for lodge office, and getting other union advantages like the AFL-CIO's Union Plus program. The union message should never be taken for granted. In the states where right-to-work laws prohibit security clauses, this is a priority program.

Are there unorganized employers in your area?

Numbers are the basis of union strength. Locals and districts are strong if we are many and if we are united. Do you keep tabs on unorganized shops and offices in your area?

Have you asked lodge members to provide contacts in those work sites? Do you have an active Organizing Committee? Do you urge officers and members to volunteer to help the Business Representative or district on new organizing drives?

Do our members need help with family or out-of-plant problems?

There are people in the membership who are coping with drug abuse problems, long-term unemployment, consumer rip-offs, alcoholism and other problems. Sometimes members need special advice on workers' compensation benefits or unemployment compensation. The lodge can set up a community services program, which will see to it that members get the services which are available in the town or through the union.

Is there trouble with the employer's health and safety practices?

Is your employer using chemicals that make workers ill? Is the noise deafening in some areas? Do unguarded machines or poor safety equipment cause accidents? Laws in both the U.S. and Canada require employers to ensure safety in the workplace. The lodge needs a program to monitor employer compliance.

Are you communicating with your members? With the community?

Even the best leaders can't lead if the people don't understand the issues. IAM officers need to educate union members and the general public about the needs and desires of working families. The IAM's voice should be heard loud and clear through local and district websites; newsletters; radio talk shows; news interviews and union involvement in community events.

As a rule, only the most active, dedicated members attend regular lodge meetings and get the news "first hand." Most of the people

you need to lead aren't at the meetings. It is vital to reach out and educate them through e-mail networks, union newsletters, websites and public relations work.

Is your voice heard on legislation?

Are members informed about important bills? Does the lodge see Senators, Representatives or Members of Parliament when they are back home? Do state or provincial legislators know the IAM's stand on issues like unemployment compensation or workplace safety? Maybe you should review the lodge's legislative activity.

What's happening on human rights?

In the last few decades there has been increased concern for ways to provide equal opportunity on the job and fair treatment for everyone, regardless of race, creed, color, national origin or sex. Has your lodge reviewed its contracts and employer practices lately? Is your lodge complying with all anti-discrimination laws?

Does your membership understand the union and its activities? Do they know how to handle grievances, make speeches, run Committees?

How do you educate the members? Officers? Stewards? Do you set up classes? Run programs at meetings? Brief new members? Send people to schools and conferences? An active education program keeps people up to date.

What is your track record on MNPL/CMPL?

Are you collecting enough money from members for the Machinists Non-Partisan Political League or the Canadian Machinists Political League? Are your members registered to vote? Do you have a year-round MNPL/CMPL program?

Are you keeping retirees part of the union?

Keeping retirees active in your lodge is an important part of your duties. Retired members have a wealth of knowledge and experience and are eager to stay involved with the union. Keeping an active retirees club and sponsoring other retiree activities is a great way to stay in touch.

There are other areas of lodge activity that should also be discussed:

- Should you have an apprenticeship program?
- Do you need to revise the lodge bylaws?
- Would members appreciate recreation activities?
- Do you keep good data and resource files for negotiating?

Once the officers or Executive Board have considered these questions, they must set priorities. Few lodges have the money or people to do everything the way it ought to be done. The leadership must make choices, then lay out a program to be recommended to the membership. When the lodge has agreed to a program it will take the cooperation of the officers, stewards, committee heads and all active members to make it a success. Everyone must be informed and involved.

Keeping Committees Active

When the lodge decides on a program or an activity, a committee is often set up to handle it. Committees spread the work around and they also help to get more people involved and participating.

What Kind of Committees?

Committees are given a job or activity in a particular area — education, MNPL, etc. Regular Standing Committees operate on a year-round basis and have responsibility for some part of the union's program. The Legislative Committee, for example, has to keep up with proposed legislation, suggest action to the lodge, and follow through by writing and contacting legislators. They are "specialists" in this part of the lodge's program.

The lodge can also make good use of Special Committees, which are set up to do one short-term job — a Picnic Committee, for example. When the job is done, the Special Committee is dismissed with thanks.

The proper use of committees keeps lodge meetings from being bogged down in rambling debates and discussions of minor details. The membership is better able to decide what to do after a committee has gotten the facts and come up with a plan. The membership can then approve, reject or change their recommendations.

IAM lodges have many different committees. Usually, when the lodge decides on a new program or activity, they set up a new committee. Commonly there are committees on legislation, MNPL, CMPL, education, communications, health and safety, community services, and bylaws. Many lodges use committees on human rights, organizing, recreation, apprenticeship, workers' compensation, health and welfare, etc. Of course most lodges have a Bargaining Committee, and when necessary, a Strike Committee.

What Makes Committees Work?

Often the lodge sets up a committee in a burst of enthusiasm and then nothing happens. No program, no activity, no committee meetings. Something went wrong.

Selecting a live-wire chairperson is the first requirement for a live-wire committee. The chairperson must be interested and enthusiastic about the work of this particular committee. He or she should also be able to work cooperatively with other people and be willing to listen to their ideas and must keep the officers informed about the committee's activities.

However, the best chairperson in the world won't get results without help from the officers and other key people in the lodge. There are a number of things the officers should do.

Make sure the committee knows what they are supposed to do.

The President should sit down with a new committee chairperson and discuss what the committee's job is, how to get started and where to get help. In some lodges, the President assigns some other officer to each committee to advise them through the year.

Give the committee backing and help.

If the committee plans an activity — and the membership approves it — the officers should support them. For example, if the Education Committee plans stewards classes, the officers and the Chief Steward should help get the stewards out and should attend themselves.

Nothing kills a committee faster than a lukewarm attitude from the officers.

Help the committee get money when they need it.

Most committees need money for supplies, pamphlets and similar "tools." Some lodges set

up a budget by membership action, allotting a committee a small sum of money each month. Under this system, big committee projects involving a lot of money are okayed by the membership separately.

Give the committee credit and appreciation.

People like to know that their work is recognized and appreciated. When a committee has done a good job, thank them publicly at the next meeting.

Selecting Committees

Under the IAM Constitution, the Auditing Committee and the Committee on Revision of the IAM Constitution must be elected by the members. For other committees, the local lodge bylaws and customs differ. In many lodges, the President appoints regular standing committees, such as those on education, health and safety, legislation, etc.

In making appointments, the President should try to spread the work around. It isn't always easy to find a good person to head a committee, but it may be better to gamble on a new person rather than to overload someone who already has too much to do.

Officers and Committee Chairpersons should keep a lookout for people who might be interested in a particular committee. This isn't always obvious. For example, someone who is annoyed with a new city tax rule may suddenly be willing to work on the MNPL/CMPL Committee or Legislative Committee.

A committee is usually more effective if different groups among the membership are represented. That way the committee gets various points of view when drawing up a program, and news about the committee seeps back informally to the membership.

OFFICERS SHOULD KEEP EACH OTHER INFORMED



Persuading People to Serve on Committees

In any organization, including the union, it is hard to find people who will stand up and volunteer to work. Usually someone has to persuade a member to serve on a committee:

- Have an officer, or some other person respected in the lodge, ask people personally. This shows that the leadership thinks the committee is important.
- Tell the person what the committee is going to do. Don't say, "it won't be much work." This makes the committee sound unimportant.
- Ask the member to do a specific job on the committee. People often get started this way.

Running Better Union Meetings

Too often union meetings are dull and disorganized. It's no wonder that members don't come.

Running a good union meeting is like taking up a grievance. You are better off if you are prepared beforehand.

The officers must get the regular business organized so it can be taken up smoothly and quickly. Nothing is worse than a long wait while the President decides what's supposed to come next.

The officers should also focus on the most important issues that face the lodge at this time and make sure that the agenda provides for information and discussion on them.

Organize the Agenda Beforehand

The President must prepare a detailed agenda well before the meeting. The IAM Order of Business, set forth in the Constitution, is the backbone of this agenda, but the President needs detailed notes on what specific items will come up.

The President should meet with the other officers to go over the final agenda.

- Check the minutes of the last meeting. Write down any unfinished business.

- What was discussed at the last Executive Board or officers' meeting? When will these items come up?
- What committees or delegates are due to report? Write them down. Check to make sure they will be there.
- What new business is coming up?

The IAM Order of Business is shown on page 35.

The Recording Secretary and the Secretary-Treasurer should also get set for the meeting. The Recording Secretary should read over the correspondence, underline key sentences and summarize less important letters. The Secretary-Treasurer should have bills and reports in order.

What's Wrong With Attendance?

Thousands of officers have tried to figure out how to get more members to come to meetings. IAM local lodges have tried raffles, attendance drawings, refreshments, movies and many other devices. These ideas work for a short period. By themselves they seldom increase attendance permanently.

No lodge has found a sure-fire gimmick, but there are some things that help:

- Make sure members know about time and place of meetings. Use e-mail, the lodge website, newsletter, handbills, radio announcements, postcards and colorful bulletin board posters.
- Follow up the meeting by publicizing the highlights: interesting quotes from the guest speaker, or announcements of planned activities and social events. You want to generate interest and draw more people to future meetings.

- Get the stewards to talk up the meeting in the shop and contact each member.
- Make someone responsible for bringing each new member to a meeting.
- Run an efficient, lively meeting. Otherwise, members won't come back.

Make the Meeting Interesting

Some officers spend a lot of time worrying about attendance. A better way to use your energy is to set up meetings that will benefit and interest the people who do come.

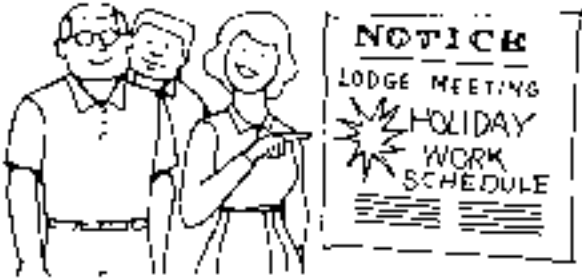


**MAKE NEW MEMBERS
FEEL WELCOME**

When something important is happening in the union, with management, or in the community, focus attention on this at the next membership meeting.

Consider what is on members' minds and what they might want to know more about. An arbitration case? Layoffs? A change in Social Security? City sales tax? Local political news? Before the meeting, make sure that this subject will be presented in an interesting way.

PLAN A 'HIGH SPOT' FOR EVERY MEETING



For example, when there is an important bill in Congress or Parliament, the Legislative Committee should make a lively report, then ask members to write short letters at the meeting. If it is time to get people registered to vote, ask the Chairperson of the Political Committee to explain why this drive is important.

The Education Committee can also be used to plan a special feature for the meeting. It doesn't have to be a TV spectacular — the Committee can show a labor video, arrange for a speaker on civil rights laws, run a panel on the history of the lodge, summarize a new pamphlet.

Most lodges do not discuss individual grievances at the membership meeting. Hashing over one person's grievance can bog down the entire meeting. Instead the Grievance Committee often makes an overall report on problems and grievances handled since the last meeting.

Try to get the members to participate and talk during the meeting. If you set a friendly atmosphere, newer members will feel at home and will speak up.

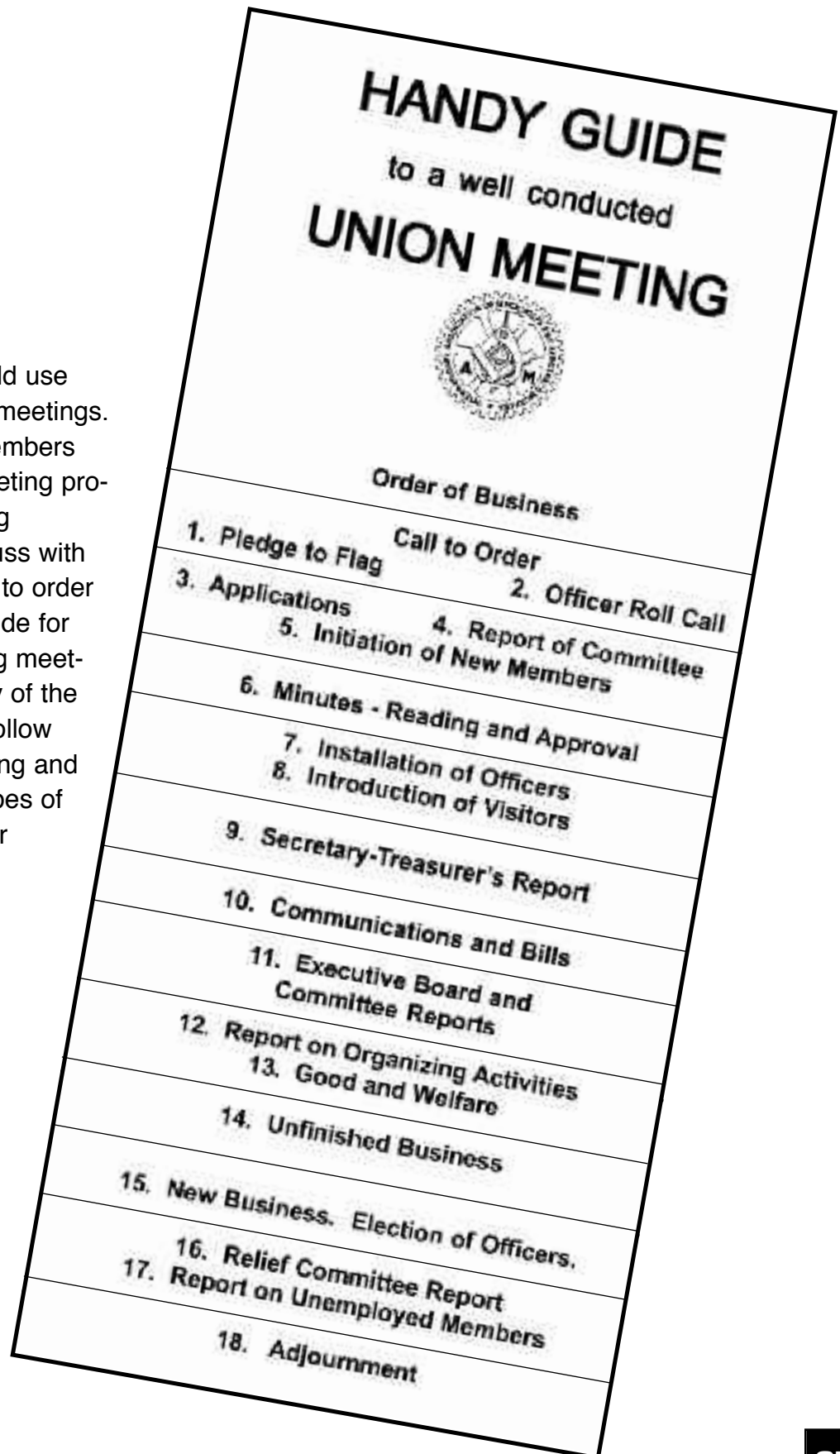
Make the Meeting Dignified

Members like a meeting conducted in a dignified and business-like way. A few simple things add a great deal:

- Start on time. Whenever possible, plan the meeting to last no more than an hour and a half.
- Officers and people making reports or speeches should stand at the front of the room, so they can be heard and seen easily.
- The opening procedure for IAM meetings and the initiation ceremony for new members are set forth in a book containing IAM rituals. They bring an atmosphere of harmony, brotherhood and sisterhood into the meeting. Conduct them with dignity.
- Make sure your union hall is clean, attractive and well ventilated. Try to get a hall that is not so large that people will rattle around.

**USE THIS OFFICIAL IAM "HANDY GUIDE"
TO EXPEDITE YOUR MEETINGS**

Local Presidents should use this guide at all lodge meetings. In situations where members are unfamiliar with meeting procedures, the Recording Secretary should discuss with the President whether to order extra copies of this guide for members to use during meetings. By having a copy of the guide, members can follow the "plan" of the meeting and know when various types of motions and other floor actions are in order.



Making the Steward System Work

The union representatives who handle grievances at the first step are an important group in the lodge. Some lodges call them stewards — others call them shop committee members, or grievance representatives. Whatever the title, members often judge the union by what the steward does on grievances and how much the steward tells them about union programs.

Experienced lodge officers know this. They go out of their way to help stewards and train them in their jobs.

Stewards Meetings

In any lodge which has more than a handful of stewards, there should be a monthly stewards' meeting. At these meetings stewards and officers talk over important grievances and problems with the employer. Some lodges set aside part of the meeting for an education program.

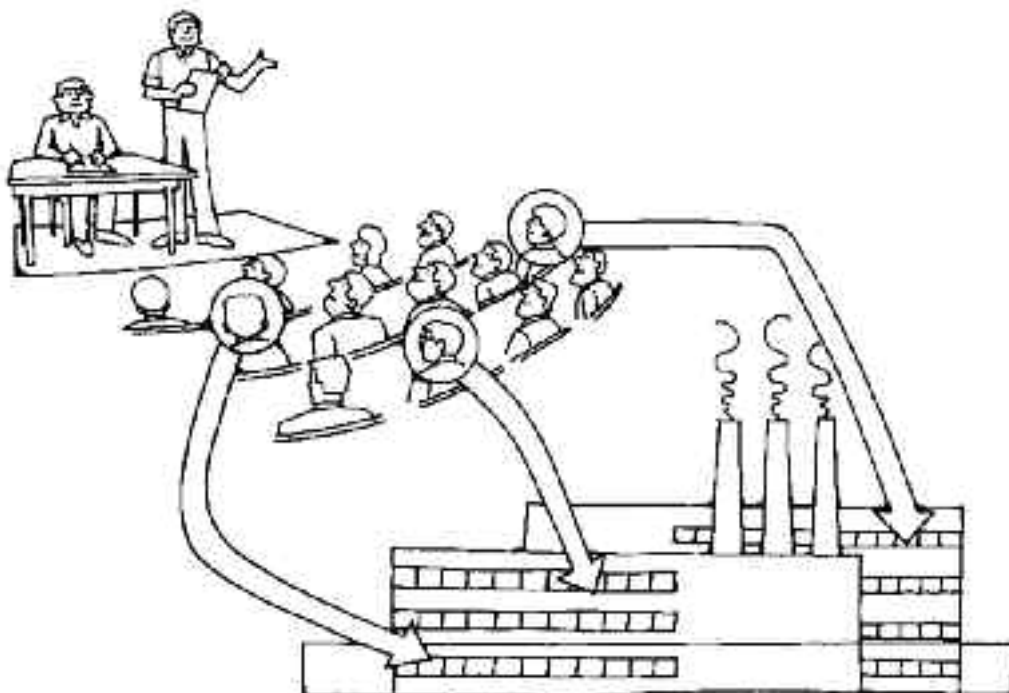
The officers or Business Representative should also tell the stewards about general lodge activities which need their help. The stewards are a basic part of the communications network in the lodge — they are the ones who have the opportunity to talk to members about union affairs and get them to understand what is needed. Keeping stewards informed builds support among the members.

Helping New Stewards

Most new stewards don't know what to do. The lodge should arrange classes to teach them the contract, the grievance procedure, the way the union operates and information they must have.

A Steward's Kit is also helpful. This Kit should be a folder which contains basic tools a steward needs — contract, lodge bylaws, seniority list, health insurance plan, OSHA regulations and similar material. Steward's Kits are available from the William W. Winpisinger Education and Technology Center.

THE STEWARDS ARE YOUR PIPELINE INTO THE SHOP



Give Stewards Experience

Officers, Shop Committees and union representatives often fail to realize that what they do may make or break a steward's interest in the job.

Stewards need encouragement — and they also need the experience of actually handling grievances. Lodge leaders who work on grievances at higher steps can help them:

- Don't bypass the steward. Tell members to take grievances to the steward, not another official higher up in the procedure.
- Make sure the steward can get advice on grievances, but make him or her take most of them up. To learn, people have to do it themselves.
- When the grievance goes to a higher step, tell the steward what is happening to it or how it was settled. A steward should be able to tell the member what is happening.
- Have the steward sit in on grievance meetings at higher steps, particularly if a grievance from his or her department is coming up. Stewards learn by watching experienced people.

Give Credit When Credit is Due

Stewards often feel that they have a thankless job. For this reason, they appreciate a word of thanks from an officer or the Shop Committee. Some lodges show stewards they appreciate their work by holding a special yearly dinner or outing.

Getting Good People to Be Stewards

If the lodge makes the steward's job important — in all ways just mentioned — it is a lot easier to get capable people to become stewards. There are still some people, however, who will hesitate because they think they don't know enough. For these people it is important to let them know they'll have advice and training.

In a weak department or shop, the officers may have to go out and look for someone who would be a good steward and get to know that person to develop his or her interest in the union.

Sometimes management makes it hard to get stewards because they won't settle grievances with them. Or the supervisor may discriminate in little ways.

It may be possible to persuade top management to straighten out the supervisors. If not, the lodge can sometimes find a clear-cut example of "discrimination" and take up a grievance. The surest method is to build up membership support for the stewards, so that there is some steam in the shop whenever an issue arises.

Any steward has to have a tough hide, but problems like this require action by the lodge as a whole.



**NEW STEWARDS NEED ADVICE
AND ENCOURAGEMENT**

Handling Finances

The financial well-being of the lodge is another special responsibility of the officers. In the IAM, the members vote on expenditures, but the officers are expected to watch over the financial health of the lodge and make recommendations.

Every lodge needs money in the bank to meet emergencies when lodge income is cut sharply, such as during a strike or a big layoff.

The lodge also needs money to carry on activities. A big bank account is no help if the lodge has neglected vital activities that build support among the members and in the community.

To be financially healthy, the lodge must have enough income to both save and spend.



A SOUND MOTTO FOR ANY LODGE

The Members' Rights

One of the officers' responsibilities is to make sure that lodge finances are handled in accordance with the IAM Constitution. The Constitution provides that the members control the money. That is their democratic right.

There are two main principles embodied in the Constitution.

■ Members control both income and expenditures.

They control income because they vote on dues increases. They control expenditures because they approve all major expenses beforehand, and they approve bills before they are paid. (Routine expenses, such as salaries, do not have to be approved each month.)

■ Members receive reports and regular accounting for lodge finances.

They know where their money goes. Under the Constitution, the members receive a report at each meeting, including receipts and disbursements since the last meeting. They also get a full report on finances several times a year from the Auditing Committee which they have elected.

These principles lay the basis for the democratic control of union money. Officers must follow the spirit and purpose of the Constitution, as well as the detailed rules.

Analyzing Finances

It is the officers' job to watch the finances from a long-range point of view. At least once a year, the officers should look back and analyze what kind of activities lodge money has been spent for and prepare a budget for the year ahead which would serve as a guide for financial operations.

One way to do this is to have the Secretary-Treasurer monitor the income and expenditures during the year. This would show how much money was spent for different kinds of activities — negotiations, donations, arbitration, delegates, processing grievances, education, public relations, legislative committee, and so forth.

A budget and periodic review like this would reveal where the lodge is spending too much — or too little — for some types of activities. A yearly summary tells more than the monthly reports, because most lodges have some months in which expenses are abnormal, such as the months during negotiations.

Budgeting

In a large lodge, it is sometimes useful to look ahead and draw up a rough budget of expenses for the year. This is particularly helpful when money is tight.

Making up a budget will give officers a map for future expenditures. Whether or not a budget is approved by the membership, each expenditure under any budget must still be approved.

To make a budget, estimate the amount of income the lodge will receive in the coming year. This includes dues and other income.

Deduct the amount of money the lodge will have to pay in per capita taxes — to the District Lodge, the Grand Lodge, state, provincial and city labor bodies, and other groups. After this deduction, you know roughly how much money the lodge will have for its own operations.

Next, estimate the lodge expenses for the year. Start with fixed expenses which probably will not change — hall rent, salaries, mortgage payments, for example.

Figure on an average amount for customary lodge activities such as education, delegates, lost time on grievances or recreation.

You may want to put aside or “save” some money for big items that do not come up every year, such as negotiations or convention expenses.

Some money should also be figured into the budget as savings or as a reserve for emergencies.

If there isn't enough money, no matter how you figure it, it is up to the officers to warn the lodge and to work out recommendations for raising dues or cutting expenses.

By working out a budget, the officers get an idea of the financial problems that may lie ahead in the coming year. However, the lodge should be careful not to get into a straitjacket with a budget, or with special funds.

Unexpected emergencies often arise during the year, and the lodge must be able to meet them with whatever money it has.

Making Financial Reports to the Membership

Listening to TV commentators, you might think that the members are never told where their money goes. This is not the problem at all. More often, the members don't come to meetings or don't pay attention to the financial reports.

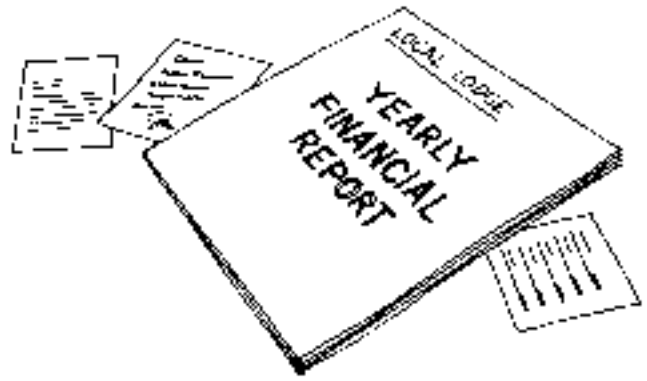
Nevertheless, officers must make a special effort to see that financial information is easy to understand and that it reaches all members. They have the right to know.

Ways of getting financial information to membership:

- Make a yearly financial report available to membership.
- Use simple language in the report. Don't say "assets," say "What your lodge is worth."
- Make a pie chart which shows what percent of the money was spent for various activities — negotiations, office expenses, delegates, picnic, and so forth. Put it on the back of the report, so members can see what they got for their dues.

It is worthwhile for officers to spend time in analyzing finances, preparing special reports, and answering members' questions. All this helps members understand lodge financial affairs, so that they can vote intelligently on dues and expense proposals.

YEARLY FINANCIAL REPORTS GIVE PERSPECTIVE ON THE LODGE



Working in the Labor Movement

No lodge can stand alone. In the labor movement, every group needs the support and cooperation of the other locals and other unions.

That is why workers first got together to form lodges and the Grand Lodge of the IAM. Then the IAM joined other unions from many different trades and industries to form the national labor federations, the AFL-CIO in the United States and the Canadian Labour Congress in Canada.

The labor movement's structure is set up so that people with similar interests and similar problems can work together and help each other.

This is why the local lodge needs to take part in union conferences and meetings in the IAM, and in the state or province where the lodge operates. This is usually the responsibility of the officers and the elected delegates.

DON'T LET YOUR LODGE BE A NO-SHOW AT LABOR MEETINGS



How Does the Lodge Fit Into the IAM?

There are nearly 900 IAM lodges in the United States, Canada, and Puerto Rico. IAM membership fluctuates as the economy goes up and down and has reached as high as one million active, dues-paying members.

The Convention

Basic policy for the IAM is made by delegates at the convention. The Convention is held every four (4) years. Every lodge is entitled to send at least one delegate, and lodges with more than 200 members have proportionately more delegates.

The IAM Convention is an important part of the government of the IAM and every lodge should send a delegate so that the members have representation when important decisions are made.

The Convention discusses and approves amendments to the IAM Constitution and sets the policy and direction of the union for the next four years.

Election of Officers

The International President, General Secretary-Treasurer and seven General Vice Presidents are the top officers of the IAM. They are elected by referendum vote of the membership. This vote takes place at local lodge meetings under rules carefully laid down in the IAM Constitution. Local lodge officers should know the procedures set down in the Constitution and follow them exactly.

In between Conventions, problems and policies affecting the IAM are decided by the Executive Council. This Council is made up of all nine top officers of the union. From time to time, the Council sends out Official Circulars on new policies. These are important documents that should be read at the next membership meeting and then kept in a location where officers have easy access to them.

If your lodge needs help or advice on a problem, you may want to get in touch with the IAM General Vice President in your area.

There are seven General Vice Presidents and each one is in charge of a territory (or industry) covering several states and one in Canada.

Union Services

There are many valuable resources for lodge officers available from the departments at IAM Headquarters and the William W. Winpisinger Education and Technology Center. For more information about the resources at IAM Headquarters, go to www.goiam.org and click on the “Headquarters” tab at the top of the home page. For information about the Winpisinger Center, go to <http://winpisinger.iamaw.org>.

Field Staff

The fulltime field staff includes Grand Lodge Representatives, Grand Lodge Auditors, Organizers, local and district lodge Business Representatives, and General Chairpersons in the railroad and air transport industries.

Headquarters – Departments of the International President

Aerospace Department

Coordinates and supports IAM activities in aerospace, with specific resources for members in specific companies or sectors. IAM Aerospace goals include: common contracts and expiration dates; industry-wide wage and benefit standards; common language on off-sets, subcontracting and outsourcing, and ultimately, bargaining contracts with the entire industry at one table.

Automotive Department

Representing automotive technicians and mechanics nationwide, the Automotive Department works for strong contracts, complete job security, and effective safety standards.

Bylaws and Internal Disputes

The Bylaws Department assists locals and districts in developing, amending, and interpreting their bylaws. The Department ensures

that proposed bylaws do not conflict with the IAM Constitution and handles disputes arising from differing interpretations of bylaws.

Collective Bargaining Department

Coordinates bargaining within the IAM and with other International unions; helps resolve inter-union jurisdictional matters (including no-raid agreements).

Communications Department

Publishes the *IAM Journal*, distributed through the IAM APP on www.goaim.org. Prepares *iMail*, which contains “fast breaking” news from inside and outside the IAM and is available to anyone who signs up for the service on the “Signup for iMail” button on the IAM website; maintains the IAM website (www.goiam.org); relays IAM views to mass media and the general public; produces the Machinists News Network of IAM-produced videos; trains and advises members in newsletter production, website development and all aspects of labor communications.

Government Employees Department

Employees in the public sector are governed by different laws and regulations in the area of collective bargaining and other union activities than employees in the private sector. The IAM maintains an expert staff in the area of regulations governing industrial relations in the public sector.

HPWO Partnerships

The High Performance Work Organization program staff helps districts and locals negotiate successful HPWO agreements that create true partnership efforts between labor and management.

Industry Coordinators

Field staff assigned to coordinate and assist lodges in specific industries, including air transport, aerospace, railroads and automotive repair.

Legal Department

Defends IAM rights in court and with government agencies; advises local and district lodges on legal and arbitration matters; handles inquiries from field staff; represents IAM in precedent-setting legal cases and conducts training on legal issues affecting workers and their families.

Legislative Department and MNPL

Works with Congress and government agencies to make sure problems of union members are understood and bills important to working families are passed.

Organizing Department

Oversees campaigns to organize workers who do not have a union and brings new members into the IAM; aids lodges in internal organizing drives.

Retirees, Community and Membership Services Department

Works with IAM lodges to organize retirees into active members of the union by establishing retiree clubs and providing information and services for older workers. The Department also works with locals and districts to help lodge Community Services Committees. Membership Services provides Employee Assistance Program help for members with problems such as drug or alcohol abuse or mounting debt. The Department also provides help for lodges dealing with layoffs and coordinates services for unemployed members.

Safety and Health Department

Trains, assists and advises field staff and district and local lodges in all matters relating to workplace health and safety.

Strategic Resources

Produces in-depth research in areas including: wage rates; insurance; fringe benefits; pensions; corporate finances and broad economic and industrial trends affecting working families. Records and analyzes IAM labor agreements.

Trade and Globalization

Coordinates activities with unions in other countries; presents the IAM's views at the International Metalworkers Federation and the International Transport Workers Federation; deals with trade and tariff problems affecting members.

William W. Winpisinger Education and Technology Center

Conducts specialized schools for IAM members, staff and officers from the U.S. and Canada in all areas of union activities, including collective bargaining, administration and leadership skills.

Women's and Human Rights Department

The Women's and Human Rights Department demonstrates the IAM's commitment to women and minorities, ensuring civil and human rights for all our members in the United States and Canada. The Department provides training for district and local lodges to develop effective Women's Committees to ensure participation by women in our union and have active Human Rights Committees to ensure all IAM members are free from workplace discrimination and harassment.

Woodworkers

Created in 1994 after the affiliation of the International Woodworkers of America-U.S. (IWA) with the IAM, the Woodworkers Department promotes the activities of our natural resource-based locals and districts.

Headquarters – Departments of the General Secretary-Treasurer

Accounting

The Accounting Department keeps track of all of the receipts and disbursements of Grand Lodge funds, including accounts receivable, accounts payable, preparing financial statements and handling payroll. The Accounting Department can provide information about your local lodge's monthly review statement, including information on the status of any checks written to Grand Lodge or credited to your account; any charges to your account or your local's account balance.

Information Systems

The Information Systems (IT) Department is responsible for implementing the IAM's technology architecture. The Department handles the organization's hardware and software needs; manages its network structure and security as well as the internal communications system at Grand Lodge. A significant role of the IT Department is the development and support of the software applications specific to the needs of the organization's mission. Applications such as VLodge Membership (VLM), VLodge.net, Virtual Finance Office (VFO) and Organize provide staff and officers the tools needed to fulfill their responsibility in servicing the membership. For information on the IAM's technology or applications, contact support@vlodge.net or 301-967-4782.

Membership Records

The Membership Records Department processes the monthly local lodge membership and per capita reports. In addition, the Department provides first-level support to VLodge Membership (VLM) users in the field, and assists some lodges with the collection and distribution of dues.

The Department also handles several other important functions such as administering the distribution of strike payments and death benefits, maintaining the roster of local and district lodge officers as well as the addresses for all active members, and handling requests for local lodge mailing labels and membership lists. Another significant service provided by the Department is the issuance of veteran service awards, retirement, exempt and lifetime membership cards.

Purchasing

Local and district lodges can purchase supplies, such as the IAM Constitution, voucher forms, minute books, membership applications, retirement and withdrawal cards, new member kits, etc., from the Purchasing Department. Order Forms are available by calling 301-967-4712 (fax: 301-967-3428).

The District Lodge

Most local lodges in the IAM belong to a district lodge. They pay per capita to the district to provide a variety of services and activities.

Belonging to a district means help for the lodge in negotiations, grievances, office work, legislative problems, community relations and other day-to-day activities. The district lodge has at least one Business Representative or General Chairperson, who works fulltime to help the lodges in the district.

The district lodge is governed by delegates who are elected by the local lodges. Districts in a city or a county usually hold monthly meetings of these delegates. Districts in an industry, such as government employees, railroad or air-line districts, hold conventions every one or two years.

The lodge should elect delegates to the district who will attend regularly and report what went on to the officers and at the membership meetings. District delegates are the people who vote and make policy for the district, so their responsibility is a serious one.

How Does the Lodge Work With Other Unions in the Community?

In every city or area, there are local unions from a variety of different industries and international unions. They need to support one another and mobilize their influence in the community — on strikes, political problems, schools, community services and similar activities. Labor usually has more clout with employers, politicians, heads of agencies and media when they know that unions are acting together.

This is the reason for the local central bodies of the AFL-CIO and the CLC. The central body deals with community and political problems of the locals in the area. It is supported by per capita from the locals and governed by the delegates sent from those locals.

To encourage a united labor movement, local lodges are required to join their local central body.

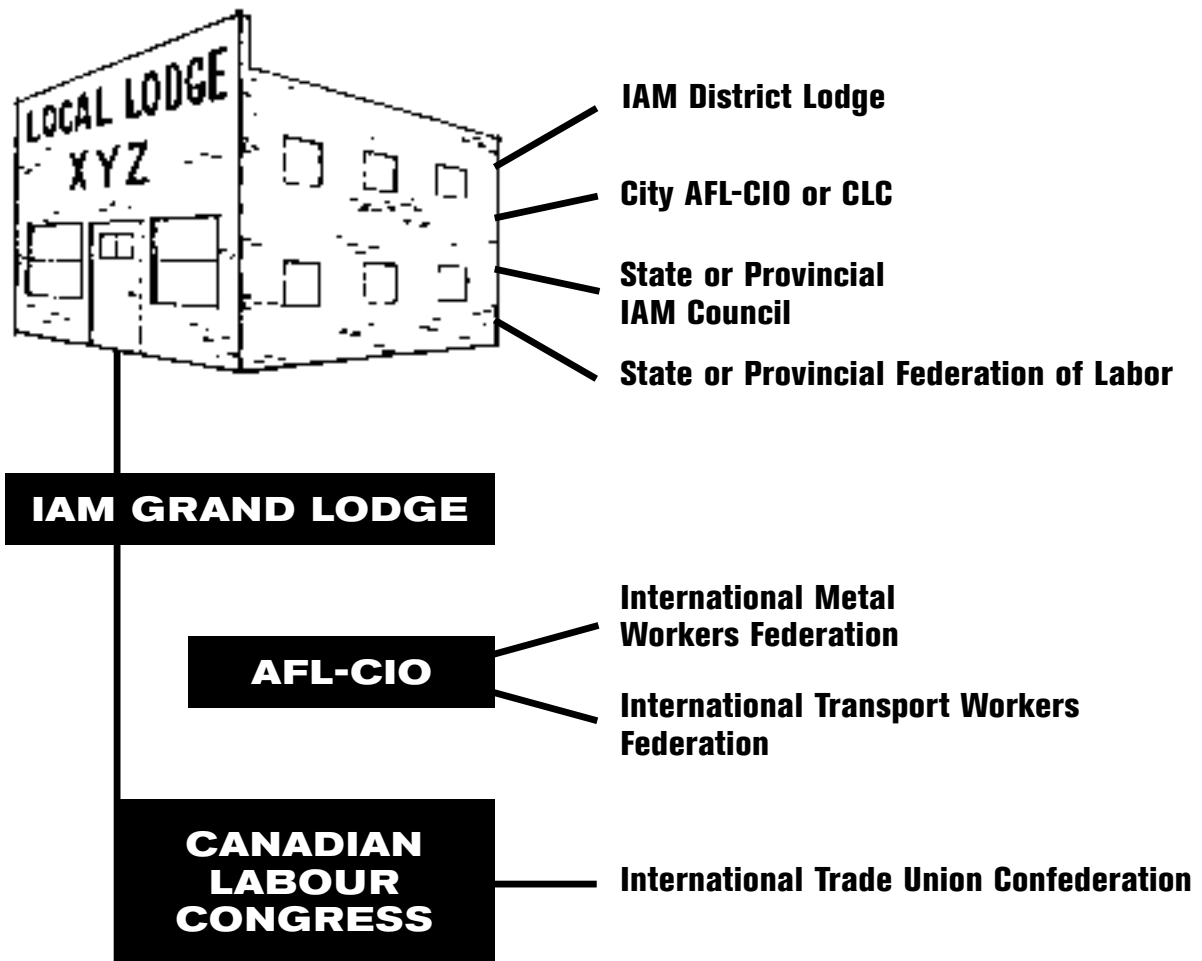
Dealing With State and Provincial Problems

Your lodge probably belongs to two different state or provincial labor groups. Both are important.

In most states and provinces, there is a Machinists Council. At its meetings, the IAM lodges in the state or province get together to discuss political, legislative and educational matters. Often the lodges exchange information on negotiations and new contracts.

Each state or province also has a federation of labor, affiliated with the AFL-CIO in the United States and the CLC in Canada. IAM lodges are required to join and pay per capita to these federations, which bring together all the locals in a particular state or province. Their main function is to influence and lobby the legislatures for bills important to labor — unemployment compensation, “right-to-work” laws, public employees bargaining and similar measures.

HOW THE LOCAL LODGE FITS INTO THE IAM AND THE LABOR MOVEMENT



The Machinists in Politics

The laws passed by our government affect members' lives every day. They set the taxes we pay, the jobs available, the education for our children, and the quality of our lives.

Laws affect the union too — they can make it easier or harder to organize and to bargain for good contracts.

The people we elect to office make these laws. That is why the IAM puts so much emphasis on political education.

In the United States

IAM members work through the Machinists Non-Partisan Political League. MNPL actively supports candidates for Congress and the Presidency who understand the needs and problems of working people. MNPL is non-partisan, endorsing candidates whose record shows that they support legislation that will benefit everyone.

Every lodge should have an MNPL Committee to:

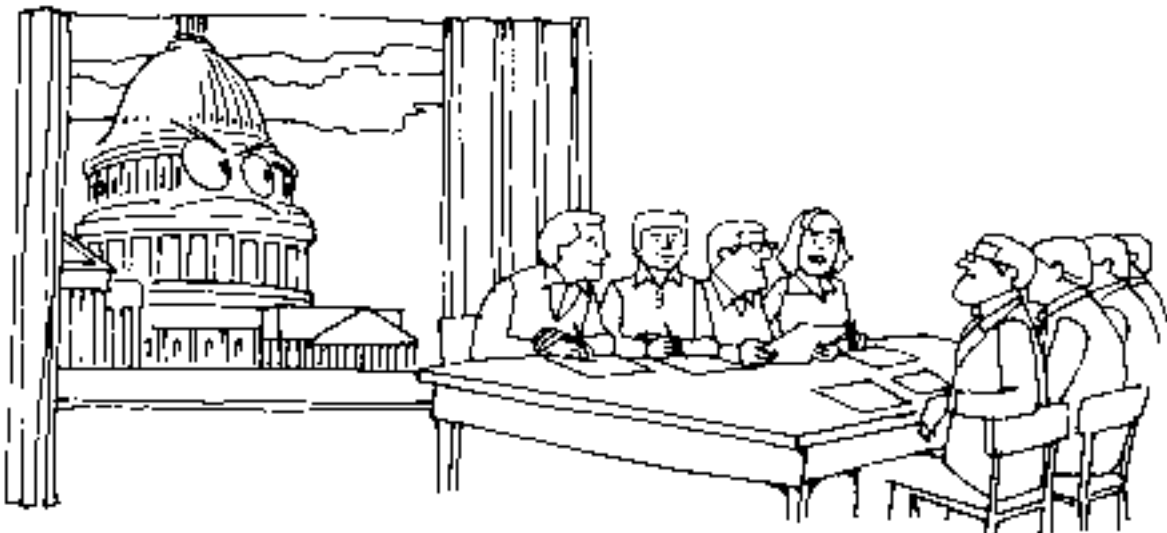
- Educate members on the issues and provide information on how their representatives are voting.
- Set up registration and get-out-the-vote drives, to encourage people to vote.
- Provide finances for candidates for Congress. This money comes from voluntary donations by IAM members.

In Canada

The IAM has set up the Canadian Machinists Political League, which works with the labour-backed New Democratic Party. The NDP was set up in 1961 to give working people an effective way to work in provincial and federal elections.

Wage controls, job safety standards, economic policies that result in layoffs — none of these issues can be solved at the bargaining table. That is why the IAM is active in the political arena. Members, of course, will vote as they see fit — the IAM's role is to keep them informed and alert on the issues.

WHAT WE WIN AT THE BARGAINING TABLE WE CAN LOSE IN THE LEGISLATURE



Chapter 4: Websites, Books and Resources

Useful Websites



IAM Grand Lodge – www.goiam.org

The IAM’s website contains links to the IAM APP to download the *IAM Journal* and a PDF version of the *Journal* to view online. The IAM’s main website also contains videos, the latest news, economic data, and a section devoted entirely to finding and contacting your elected representatives from federal, state and local governments.



IAM APP – www.goiam.org

The IAM APP enables members to use their smartphones and tablets to read the digital *IAM Journal*. To download the free IAM APP, go to GOIAM.org, look for the IAM APP graphic, and follow the links to Apple’s iTunes Store or the Android Market.

Facebook – www.facebook.com/MachinistsUnion

The IAM has a page on Facebook for sharing information. Sign up as a “fan” at www.facebook.com/MachinistsUnion, or click on the Facebook icon at the top of any page on www.goaim.org.



Twitter – <http://twitter.com/machinistsunion>

For up-to-the-minute news about the IAM, you can follow the Machinists Union on Twitter.



William W. Winpisinger Education and Technology Center – <http://winpisinger.iamaw.org/>

Use the IAM Education and Technology Center site to check class schedules or find out about college credit for classes; register for the IAM member-only section and borrow by mail cds, videos and books from the Winpisinger library; use the comprehensive list of Internet sites or join the collaborative learning center.

Grand Lodge – www.VLodge.net

Certain local officers can use VLodge.net (www.VLodge.net). VLodge.net is a service provided by Grand Lodge that provides information about what's happening in your local, district and territory; has an area for model contract language; has resources for your financial officer; has Official Circulars and has information on services available from the departments at Grand Lodge. Contact VLodge support at 301-967-3481 for information on eligibility and how to register.



AFL-CIO – www.aflcio.org

The AFL-CIO's comprehensive site contains lots of useful information that many local lodge committees can use. Especially useful is the "Working Families Toolkit" (www.workingfamieliestoolkit.com) section that has ready-made flyers on important issues and background information for educating members.

The Canadian Labour Congress (CLC) – www.clc-ctc.ca

The IAM and a majority of national and international unions in Canada belong to the CLC. It includes 12 provincial and territorial federations and 125 district labour councils, representing 2.5 million unionized workers. The CLC website has Canadian news and information and a list of links and resources.



Books and Resources

Here's a list of pamphlets and other materials useful to IAM officers, along with ordering information for these and other resources. Request pricing information at time of ordering.

Addresses for union headquarters listed here as sources are:

International Association of Machinists and Aerospace Workers (IAM)

9000 Machinists Place
Upper Marlboro, MD 20772-2687
301-967-4500

William W. Winpisinger Education and Technology Center

24494 Placid Harbor Way
Hollywood, MD 20636
301-373-3300

AFL-CIO

Support Services Department
815 Sixteenth Street, NW
Washington, DC 20006
202-637-5327

Canadian Labour Congress (CLC)

2841 Riverside Drive
Ottawa, Ont., Canada K1V 8X7
613-521-3400

For Welcoming New IAM Members

The “New Member Kit” contains information about the IAM, including a video, a “Welcome to Your Union” booklet, pamphlets on services available and an MNPL booklet. It is critical that lodges use the materials in the New Member Kit because they ensure that the union provides certain information required by U.S. law. (IAM)

Better Union Meetings

Handy Guide to a Well Conducted Union Meeting — A ready reference to the official IAM order of business and procedures for lodge meetings. (IAM/William W. Winpisinger Education & Technology Center)

How to Run a Union Meeting — Excellent simple pamphlet on parliamentary procedure. 64 pages. (AFL-CIO)

Parliamentary Procedure at a Glance — Explains all types of motions and rules in detail. By O. Garfield Jones, published by Penguin Books. (Order through your local bookstore.)

IAM Government and Laws

IAM Constitution — (IAM/GST's Department)

IAM Official Circulars — Supplements the IAM Constitution with important information on IAM policies and procedures (IAM)

Welcome to Your Union — Outlines government and structure of the IAM and provides information required by U.S. law. (IAM)

For Apprenticeship Committees

IAM Apprenticeship Policy Manual — Explains apprenticeship standards and how to establish joint apprenticeship programs. For this and other information: (IAM/Apprenticeship Department)

For Communications Committees

Contact the IAM Communications Department for information about the local Communicator position; printed information, training and advice on writing, editing and publishing handbills, union newsletters and websites; the free IAM Microsite service for locals that do not have existing sites; getting the

union message out in an effective, positive way to the press and public, and establishing local and district Communications Committees. (IAM/Communications Department)

International Labor Communications Association (ILCA) — ILCA is the main network for U.S. union communicators. Offers a wealth of printed information, valuable contacts, regional and national conferences, etc. (AFL-CIO/ILCA – <http://www.ilcaonline.org>)

Canadian Association of Labor Media (CALM) — CALM is the main network for Canadian union communicators. (CLC/CALM – www.calm.ca)

For Community Services Committees

Contact the IAM Retirees, Community and Membership Services Department for literature and guidelines on establishing a Community Services Committee to serve the needs of IAM members and their communities. The Department also has important services such as an Employee Assistance Program for helping members with drug, alcohol, or other problems and an Employment Services program to help members facing layoffs survive unemployment and get back to work.

For Education Committees

Contact the Winpisinger Center for information about the local lodge Educator position.

Educational Videos and Films — Lists are available through the IAM Communications Department and the AFL-CIO Support Services Department.

IAMAW Education Handbook for District and Local Lodges — Explains how to start a committee, plan programs, use resources and learn teaching techniques. (IAM/William W. Winpisinger Education & Technology Center)

William W. Winpisinger Education Center Online Lending library — Borrow cds, videos and books by mail from the Center's library. IAM members can register online at <http://winpisinger.iamaw.org>.

IAM Educator — A bi-monthly newsletter with valuable information for shop stewards that is mailed to the lodge Educator for distribution to lodge stewards.

For Human Rights Committees

Human Rights Manual — Comprehensive guide for setting up and operating an effective Human Rights Committee (IAM/Women's and Human Rights Department)

Human Rights Action Guide, Human Rights in the IAM and Pocket Guide for Handling Discrimination Complaints — Pamphlets and a pocket guide for understanding the role and functions of a Human Rights Committee (IAM/Women's and Human Rights Department)

For Legislative Committees

IAM Congressional Directory — Current, state-by-state lists of all U.S. House and State members includes: telephone/fax/and e-mail information for district and Washington, D.C. offices; Committee assignments and names and contacts of key Congressional staff. (IAM/Legislative Department)

The Politics and Legislation section of the IAM website, www.goiam.org, has a section that allows anyone to find their federal, state or local elected legislators, track voting records and send e-mail messages on important issues.

For Negotiating and Shop Committees

Labor Costs in Canada — Reviews current economic problems confronting unions in Canada. (CLC/Research Department)

Contact the IAM Strategic Resources Department for a wide range of contract data on subjects including: wages and cost of living; fringe benefits and job classifications. In-depth reports on specific companies must be requested by your IAM servicing representative. (IAM/Strategic Resources Department)

For Retiree Committees

Guide for Older Workers and Retired Members Programs — Explains how lodges can set up effective retiree clubs and programs. (IAM/Retirees Department)

For Political Education, CMPL and MNPL Committees

In the U.S., contact the Machinists Non-Partisan Political League (MNPL) for a wide range of information on how to get your political education program rolling. (IAM/MNPL)

Contact the IAM Canadian Office for information about the Canadian Machinists Political League (CMPL) and IAM political work in Canada. (IAM Canadian Office, 15 Gervais Drive, Suite 707, North York, Ont., Canada K1P 5M1, 416-386-1789)

Other Valuable Resources for IAM Officers

IAM Scholarship Program — Explains how the IAM Scholarship Program works. (IAM/Scholarship Program)

Contact the AFL-CIO Support Services Department for a complete list of pamphlets, books, videos and other materials published by the AFL-CIO. Topics range from labor history and economics to civil rights and labor law. (AFL-CIO/Support Services Department)

Other Books Recommended By and Available at the William W. Winpisinger Education & Technology Center

Steward Training materials (for instructors, one per lodge)

Key to Being a Successful Steward (useful to new and experienced Stewards). — free

Officers' Kit — Duties and Responsibilities of Local Lodge Officers. (Useful to new and experienced officers. Includes an Officers' Guide and a Handy Guide to a Well Conducted Union Meeting.) — free

Labor's Untold Story, by Richard O. Boyer and Herbert M. Morais, Pub. New York United Electrical, Radio & Machine Workers of America, 1975 — The hidden history of the workers' struggle for social and economic justice in the U.S. This 402 page book is beautifully written; accurate and inspiring. Ideal for steward and labor education classes.

An Illustrated History of the Canadian Labour Movement, by Desmond Morton, McGill-Queens University Press, November 1999.

Education for Changing Unions, Bev Burke, et. al., *Between the Lines*, January 2003

Parliamentary Law at a Glance (based on Robert's Rules of Order) Revised by E.C. Utter, Pub. Lincolnwood, IL, Contemporary Books, 1997.

Robert's Rules of Order, by Henry M. Robert, Pub. Toronto, New York, Bantam, 1986.

The Labor History Reader, Edited by Daniel J. Leab, Pub. Urbana, Univ. of Illinois Press, 1985.

Unions and Economic Competitiveness, Lawrence Mishel, Paula B. Voos, Editors, Pub. Armonk, NY, M.E. Sharpe, 1992.

How Arbitration Works, Elkouri & Elkouri, Co-editors Marlin M. Volz and Edward P. Goggin, BNA Books.

Grievance Guide, by BNA Editorial Staff, BNA Books.

NLRB, Union Representative's Guide to RC & CA Cases, Center for Labor Research and Education, Institute of Industrial Relations, University of California, Los Angeles.

Recommended Books That Are Not Available Through the William W. Winpisinger Education Center

Labor Guide to Labor Law, Bruce Folsacker, Prentice Hall.

Labor Revolution, Gus Tyler, Viking Press, 1967.

Labor in America, Harold Faulkner and Mark Starr, 1958.

The Practice of Unionism, J. Barbash.

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AND AEROSPACE WORKERS**

**9000 Machinists Place
Upper Marlboro, MD 20772
301-967-4500**

www.goiam.org