

IAM Officers Guide



For Lodges in the United States

The Machinists
**Executive
Council**



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AIR TRANSPORT TERRITORY

A Message from
**International President
Robert Martinez, Jr.**



Dear Sisters and Brothers,

Our updated IAM Officers Guide has been prepared to give IAM local lodge officers important information and details to help them maintain today's lodges.

The demands upon leaders at all levels of the IAM require a solid understanding of their duties and responsibilities. Whether you are a president using proper rules of order to run a local lodge meeting, a recording secretary keeping minutes or a secretary-treasurer maintaining accurate and up-to-date records, this publication will give you everything you need.

This new guide also explains in detail the responsibilities of executive board members, trustees and all other lodge personnel. It is designed to instruct and reassure new or prospective officers about what is expected, and it provides valuable insights for those with more experience. The information within these pages will be a asset to you—whatever your role in the lodge.

The leadership skills and teamwork you demonstrate will benefit you in planning meetings, staffing committees and creating assignments. A good local lodge is the result of good leaders with a clear knowledge of and commitment to their duties and responsibilities. The IAM recognizes that today's local lodge officers are tomorrow's district, state, provincial and national leaders.

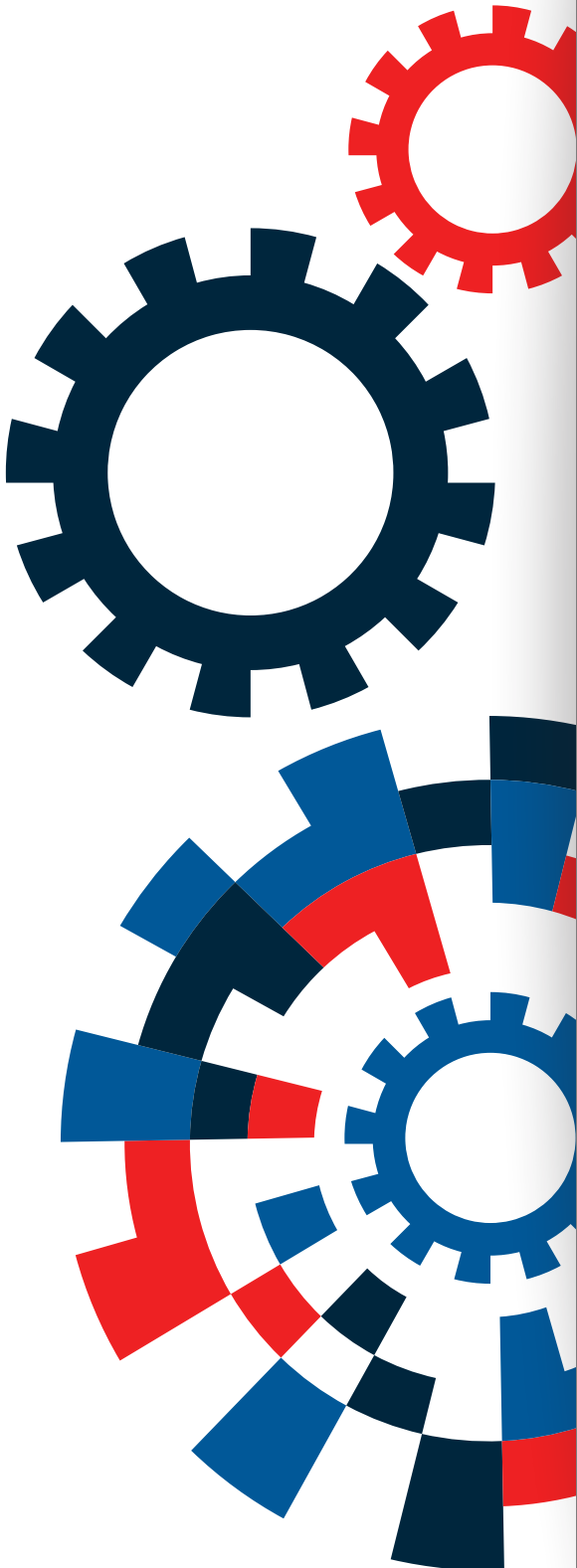
Thank you for all you do on behalf of our members—and for helping our union put the "fight" back in the Fighting Machinists.

In solidarity,

A handwritten signature in black ink that reads "Robert Martinez Jr." with a stylized flourish at the end.

Robert Martinez Jr.
International President

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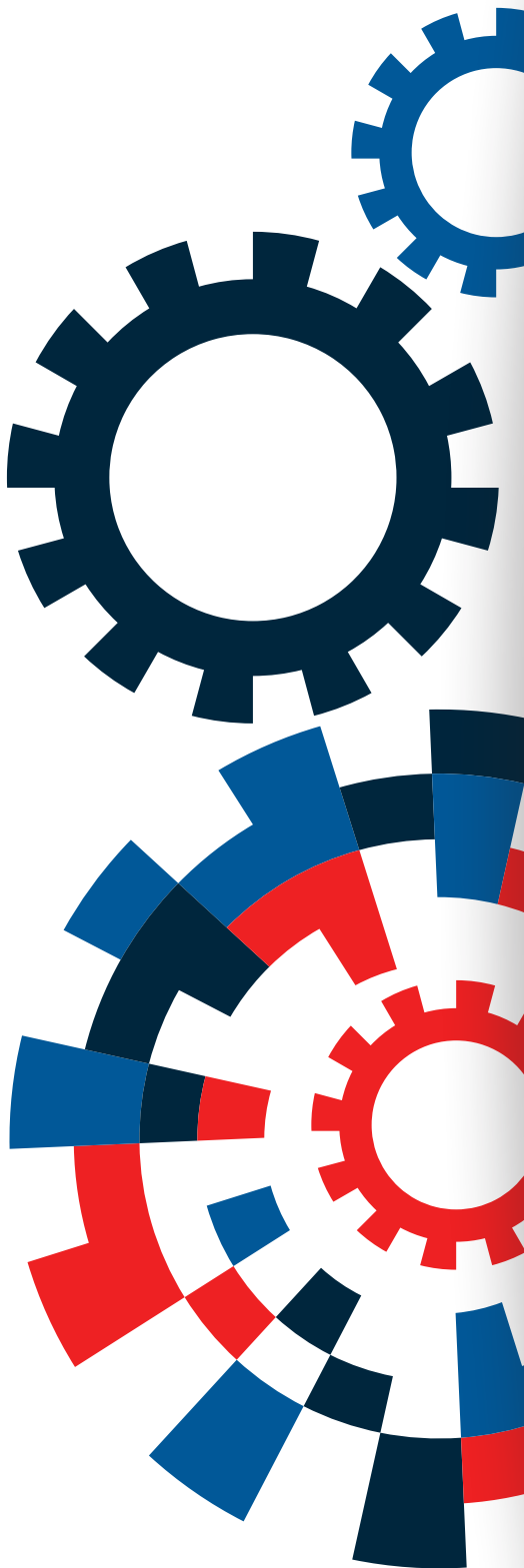
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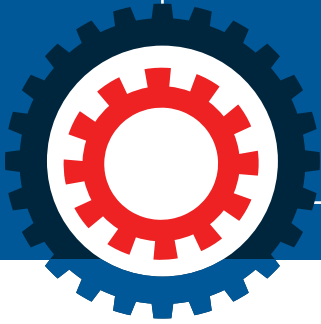


Duties of Local Lodge Officers

NOTE:

- The specific duties mentioned herein are only the bare necessities of the job itself. There are many additional responsibilities which are customarily associated with these positions.
- The document that follows is in no way intended to replace or supersede the IAM Constitution or your Local Lodge By-Laws; it is meant only to remind Local Lodge Officers of their typical duties.

Some of the more important responsibilities for each positions are included.



Duties of the President

As chief executive officer of the Lodge, the President is both Lodge leader and “quarterback” of the “team” of elected officers. The President provides leadership to the Lodge, not as a dictator, but through and with the cooperation of all the Local Lodge Officers. Decisions and recommendations of the Local Lodge Officers become the President’s decisions and recommendations. The President must see that meetings of the Local Lodge Officers are held regularly.

This will help the President carry out the responsibilities, in accordance with the IAM Constitution and your Local Lodge By-Laws.



■ Signs Vouchers & Checks

1. The President must make sure that all checks are properly drawn and that the bills being paid have been approved by the membership. The master vouchers are signed by the President and the Recording Secretary, after confirming all receipts are attached.

2. 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.
3. 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.



■ Chairs Local Lodge Meetings

1. When the membership meeting is called to order, the President and the Local Lodge Officers 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.

2. 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.

■ 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 Constitution/By-Laws

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 accurate minutes. The President is responsible for 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.



■ Applies Parliamentary Procedure in the Union Meeting

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.

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/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.

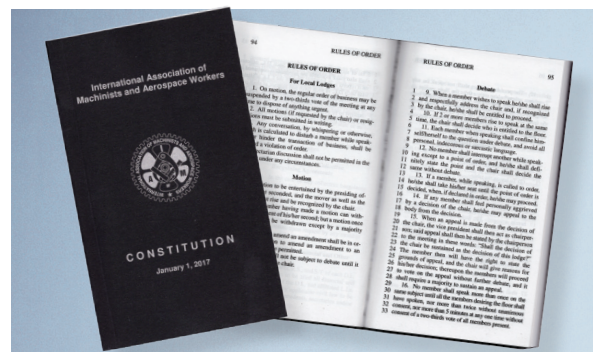
In any situation where there is a controversial issue, or where there is a sharp division of opinion, the presiding officer must be careful to see that motions, discussion and voting follow proper parliamentary procedure and the IAM Constitution. This will keep dissatisfied members from questioning lodge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

■ Handles Discussion

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

1. 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.
2. 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.

3. Keep a firm hand on the person who always talks too much — enforce the IAM rule on the 5-minute time limit.
4. Tactfully educate members about parliamentary law — don't let it be used to confuse them.
5. Don't just say, "You are out of order." Explain how or when the member could make a point.
6. 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.
7. Protect every member's right to speak, even if the person has an unpopular opinion.



■ The Following Rules of Order Are Provided for in the IAM Constitution

1. On motion, the regular order of business may be suspended by a two-thirds vote of the meeting at any time to dispose of anything urgent.
2. All motions (if requested by the chair) or resignations must be submitted in writing.
3. Any conversation by whispering or otherwise, which is calculated to disturb a member while speaking or hinder the transaction of business, shall be deemed a violation of order.
4. Religious discussion shall not be permitted in the meetings under any circumstances.

The Steps to Handling Motions

STEP 1.
RECOGNITION

Mr. Chairman!



STEP 2.
MAKING A MOTION

I move that...



STEP 3.
SECONDING

I second it!



STEP 4.
STARTING THE MOTION

It has been moved and seconded that...



STEP 5.
DISCUSSION

In support of...



STEP 6.
RESTATING THE MOTION

The motion before us is...



STEP 7.
VOTING

All in favor say "aye".
All opposed, "no".



STEP 8.
ANNOUNCING THE RESULT

The motion is carried.



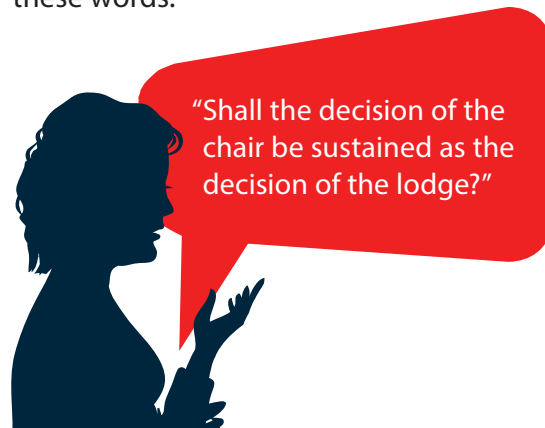
■ Motions

5. A motion to be entertained by the presiding officer must be seconded, and the mover as well as the seconder must rise and be recognized by the chair.
6. Any member having made a motion can withdraw it by consent of his/her second; but a motion once debated cannot be withdrawn except by a majority vote.
7. A motion to amend an amendment shall be in order but no motion to amend an amendment to an amendment shall be permitted.

■ Debate

8. A motion shall not be subject to debate until it has been stated by the chair.
9. When a member wishes to speak he/she shall rise and respectfully address the chair, and if recognized by the chair, he/she shall be entitled to proceed.
10. If 2 or more members rise to speak at the same time, the chair shall decide which is entitled to the floor first.
11. Each member when speaking shall confine himself/herself to the question under debate, and avoid all personal, indecorous or sarcastic language.
12. No member shall interrupt another while speaking except to raise a point of order, and he/she shall definitely state the point, and the chair shall decide the point of order without debate.
13. If a member, while speaking, is called to order, he/she shall take a seat until the point of order is decided. Then, if declared in order, the member may proceed.
14. If any member shall feel personally aggrieved by a decision of the chair, he/she may appeal to the body from the decision.

15. When an appeal is made from the decision of the chair, the vice president shall then act as chairman; said appeal shall then be stated by the chairman to the meeting in these words:



The member will then have the right to state the grounds of appeal, and the chair will give reasons for his/her decision; thereupon the members will proceed to vote on the appeal without further debate, and it shall require a majority to sustain an appeal.

16. No member shall speak more than once on the same subject until all the members desiring the floor shall have spoken, nor more than twice without unanimous consent, nor more than 5 minutes at any one time without consent of a two-thirds vote of all members present.
17. The presiding officer shall not speak on any subject unless he/she retires from the chair (except on points of order), and, in case of a tie, he/she shall have the deciding vote. Should the presiding officer retire from the chair to speak on any subject before the lodge, he/she shall not return to the chair until that subject matter is properly disposed of.

■ Privilege Questions

18. When a question is before the meeting, no motion shall be in order except:

- To adjourn.
- To lay on the table.
- For the previous question.
- To postpone to a given time.
- To refer or commit.
- To amend;

These motions shall have precedence in the order therein arranged. The first 3 of these motions are not debatable.

19. When there is an amendment to an amendment, the question shall then be put as follows:

- Amendment to the amendment.
- Amendment.
- Original proposition.

20. When a question is postponed indefinitely, it shall not come up again except by a two-thirds vote.

21. A motion to adjourn shall always be in order except:

- When a member has the floor.
- When members are voting.

22. Before putting a question to vote the presiding officer shall ask: "Are you ready for the question?" Then it shall be open for debate. If no member rises to speak, the presiding officer shall then put the question in this form: "All in favor of this motion say 'Aye';" and after the affirmative vote is expressed: "Those of the contrary opinion say 'No'." After the vote is taken he/she shall announce the result in this manner: "It seems to be carried (or lost); it is carried (or lost) and so ordered."

23. Before the presiding officer declares the vote on a question, any member may ask for a division of the house. Then the chair is duty bound to comply with the request and a standing vote shall then be taken, and the secretary shall count the same.

24. When a question has been decided, it can be reconsidered by a majority vote of those present.

25. A motion to reconsider must be made by a member and seconded by another member, both of whom must have previously voted with the majority.

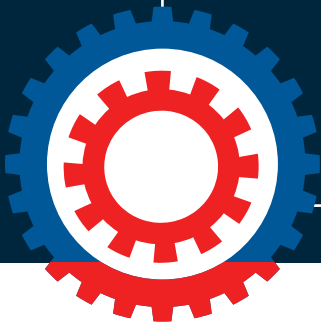
26. A member being ordered to take his/her seat 3 times-by the chair, without heeding, shall be debarred from participating in any further business at that session.

27. All questions, unless otherwise provided, shall be decided in accordance with Robert's Rules of Order.

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.

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 on page 6. 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.

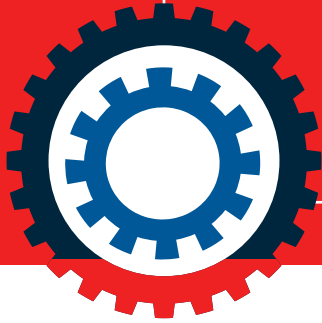


Duties of the Vice President

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. Additionally, the Vice President:

1. Chairs meetings when the President is absent.
2. Helps keep order at meetings.
3. 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.
4. Assumes duties of the President in his/her absence, as prescribed in the Constitution and Local Lodge By-Laws.
5. Assumes the Chair at meetings on an appeal from the decision of the Chair.





Duties of the Secretary-Treasurer

ARTICLE C, SEC. 4 of the IAM Constitution details the duties of the Secretary-Treasurer. The S.T. of L.Ls. that are not affiliated with a D.L. shall perform all of the functions hereinafter enumerated. S.Ts. of L.Ls. that are affiliated with a D.L. shall perform only those functions not performed by the D.L. S.T. The S.T. shall perform the following duties.



■ Financial Duties

- He/She shall receive and deposit all funds of the L.L. in a bank of sound financial standing in the name of the L.L.; pay all properly authorized vouchers as prepared by the Recording Secretary, all payments must be made by electronic fund transfer, or shall be countersigned by the President of the L.L.
- The S.T. shall collect all monies from any source for the benefit of the L.L.; keep a systematic account of all disbursements in such a way as to show the balance of cash on hand and submit all financial and membership records to the auditing committee of the L.L. semi-annually

(at the close of June and December) when called for by the President.

- Local Lodges are encouraged to computerize the financial record keeping functions, provided the L.L. owns or leases its equipment. Before implementing any computerized system, the office of the G.S.T. and the financial officer of the L.L. must meet to determine that the anticipated system will produce the necessary reports for the I.A.M. audits and any required government reports.



■ Membership Dues Collection and Reporting

At the end of each month, the S.T. shall ensure a verified copy of the monthly membership report has been submitted to the G.S.T., and a copy retained for the Lodge records. If the Local Lodge does not generate this report, it is the S.T.'s responsibility to obtain a copy from the District Lodge or Grand Lodge as appropriate. Local Lodge S.T.s shall ensure proper per capita tax has been consistent with the report. The monthly report shall include a correct statement of the

number of members on the books of the L.L. Monies collected by S.Ts. on behalf of the G.L., as indicated on monthly reports, shall be used for no other purpose.

The Local Lodge S.T. shall present a financial report to the membership at the regular monthly meeting of the Lodge which shall specify the balances of the Lodge accounts such as the General Fund, Emergency, Strike Fund, Investment accounts and the like. The report shall include an up to date accounting of membership gains and losses.

■ Protect the Funds of the Lodge

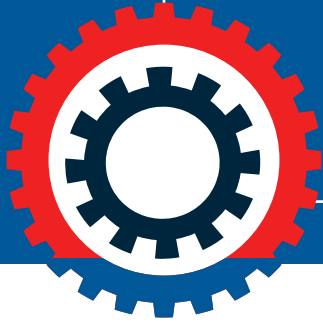
The S.T. provides an important part of the checks and balances in protecting the assets of the Lodge. He/she has fiduciary responsibility to review and scrutinize all expenditures to ensure a proper union purpose and proper authorization for the expenditure as well as proper supporting documentation before paying the voucher.



■ Federal & State Reports

The S.T. is responsible for preparing and submitting all required government reports in a timely manner such as LM filing, 990's, state and federal tax returns and the like. See the Financial Officers Reference Manual for more details.





Duties of the Recording Secretary

KEEP ACCURATE RECORDS

Specific Duties at Meetings

The Recording Secretary has an important role to play at local lodge meetings and should therefore be prepared in advance to perform such duties as the following:

1. Call the roll of officers.
2. Keep accurate minutes of the current meeting.
3. Read minutes of the last meeting in a clear and distinct manner. To be easily heard, it may be advisable to stand.
4. Assist the President in following carefully the regular order of business as prescribed in the Constitution (Art. D. Sec. 5). The IAM's Handy Guide to a Well Conducted Union Meeting (found at the end of this document) can be a very useful reminder for the Recording Secretary as well as for the other officers.
5. Present communications and bills.
6. Supply information and remind the President of any unfinished business.
7. Supply items from correspondence for action under new business.
8. Collect for filing the written reports submitted by committees.
9. At all times work in close cooperation with the meeting chairperson who is responsible for conducting a successful meeting.
10. Chair a meeting long enough for a temporary chairperson to be selected in the event of the resignation or absence of both the President and Vice President.
11. Maintain a list of standing committees which are currently in existence. When a committee is appointed, the names of the committee members and all relevant information should be handed to the committee chairperson.
12. Maintain a "meeting attendance book" in lodges whose bylaws provide that in order to qualify as a lodge officer or delegate, a member must attend a certain percentage of meetings during the 12-month period ending on the date of close of nominations.

If the Recording Secretary is absent from the meeting, the Chair should appoint another member to serve for that meeting. Minutes must be signed by the person taking them.

■ Meeting Minutes

The Recording Secretary is responsible for the handling and writing of the minutes of Executive Board, regular and special lodge meetings. They are the only source of reference as to what has been done and they also serve as a reminder of future action to be taken.

Sample Minutes



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

The Department of Labor strongly suggests that minutes be handwritten.

Local No. 6011
INTERNATIONAL ASSOCIATION of MACHINISTS and AEROSPACE WORKERS

FORM MR06 PRINTED IN U.S.A.
Date March 10, 2018
The Lodge was called to order at 8:05 p.m. and opened in due form
The official roll call resulted as follows:
President John Ramano Conductor James Heaton
Recording Sec'y Mary Firmans Sentinel Stephen Shakelford
Trustee Kathy Perez Trustee Jim Pausc
Trustee Jeff Fielding Trustee Bridgett Emerson
Trustee Matthew Speakman Trustee Ben Sites

Minutes of last meeting were read and approved
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

Bills: The following regular bills were read: per-capita to District: \$1,640; per-capita to Grand Lodge \$2,940; Bay Phone Co. \$409.08; rent of hall \$400; New Bills were presented and approved as follows: John Ramano (last time \$3540) Marias Bakery (\$340)

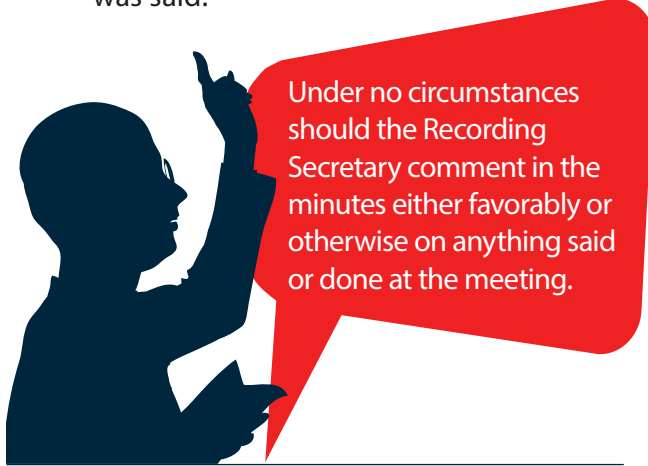
Reports: Business Representative Jamison reported on the strike at Miller Motor Co. and the upgrading grievance in the Machine Shop. The Education Committee chairperson reported on a letter regarding Machinists Leadership Schools this summer. A motion by Higgins seconded by Jones was passed to send two members to the Winpingsinger Center in May with last time expenses.

Good and Welfare: None Sick and Disabled Members and Relief Committee: None

The Meeting Adjourned at 9:15 p.m.
Respectfully submitted by Kathy Perez, Recording Secretary

Minutes of a lodge are the only permanent record of the activities and official actions of the lodge. The following suggestions should be followed when writing minutes:

1. Show clearly in the minutes what business was brought up at the meeting and what action the members did or did not take. Each order of business should be recorded in the minutes. Where no action was taken, the word "None" should appear. Remember that minutes should be a record of what was done and not what was said.



2. Record each motion as stated by the Chairperson. The exact wording of each motion must be written down and the Recording Secretary should be asked to read the motion before the vote. If the Chairperson rewords a motion to clarify it, that is the way the motion is recorded in the minutes. A motion that has been withdrawn should not be recorded. All resolutions that have been adopted must be entered in the minutes in full.
3. Record the wording of the motion and the action taken on it. Every motion that is voted on must be written out in the minutes, indicating whether it was passed or not. If the voting on a motion is counted (ballot, roll call or count of hands), the minutes should show the exact count. Action taken by the local "by unanimous consent" should also be noted.

4. Record the names of members making or seconding all motions. It is advisable to do this for future reference, especially if a correction is called for at the next meeting.
5. Take the roll call of officers. The minutes must show if a meeting was not held due to the lack of a quorum.
6. Use as few words as possible when writing the minutes but include enough detail so that the members who missed the meeting will understand what took place. Emphasize what was done and decided at the meeting, not what was said. Record the details of speeches, reports, or discussions only when it is felt that they are important for future reference.
7. Attach to, or file with, the minutes, and so note in the record, any document which was presented to the meeting and which might need to be referred to in its entirety. Examples are: written reports of lodge committees and copies of the master voucher and the agenda for the meeting.
8. Briefly summarize the reports and recommendations of lodge committees and delegates. Show what action was taken on reports, if any.
9. Take careful notes during the meeting as each item on the agenda is handled. This will be easier if you have a copy of the "Order of Business" from the IAM Constitution. "The Handy Guide to a Well Conducted Union Meeting" is also a useful reference; found on page 35 of this guide.
10. Write up a draft of the minutes while the meeting is still fresh in your mind. Make a new paragraph for each subject and each order of business.
11. **Handwrite the final minutes** of Executive Board, regular and special lodge meetings in an approved minute book that is available from the Purchasing Department at IAM Headquarters (301) 967-4712.

■ Correcting the Minutes

A correction or addition to the minutes should be written in full on the last page of the minutes which require changing. All corrections must be initialed. Minutes may be approved and corrected only by the body whose record they are. For example, the Executive Board must approve and correct its own minutes. A motion to correct the minutes may be either for a deletion or an addition.



■ Taking the Minutes When the Recording Secretary Is Absent

If the Recording Secretary is absent from a meeting the minutes should state, for example: "The Recording Secretary being absent, Robert Smith was appointed Recording Secretary pro tem. The minutes were read and approved." If the minutes were not available, state: "The reading of the minutes was dispensed with." The minutes must be signed by the person who was appointed to serve as Recording Secretary for that meeting.

■ Financial Responsibilities

The Recording Secretary is significantly involved in the financial aspects of lodge operations in the following ways:

1. All officers who receive bills should forward them to the Recording Secretary so that they will be presented at the proper time during a lodge meeting. All bills must be presented and read at the meeting.

The minutes must also show the amount of the bills, to whom they are paid and whether they have been approved or disapproved by the members. If there is any question regarding a bill, the Recording Secretary should be prepared to give a full explanation. Members must be kept fully informed about lodge finances so that intelligent decisions can be made.



2. Bills should include all lodge expenditures. Recurring bills, such as per capita taxes, rent, withholding taxes and salaries that have been previously authorized by the IAM Constitution or bylaws must be presented for the members' information and be recorded in the minutes, even though they do not need to be approved again. As a keeper of the minutes, the Recording Secretary is in charge of the record showing the approval by members of lodge expenditures and is, and therefore no funds can be moved from the treasury unless it is first properly documented in the meeting notes.



NOTE:
Standing motions should not be used.

3. When the members have approved payment of a bill, the Recording Secretary must sign a master voucher and place the seal of the lodge on it. A master voucher is available from the General Secretary-Treasurer's Department which saves time in writing vouchers.



Any vouchers written that are not authorized by minutes are in violation of the IAM Constitution and the Labor-Management Reporting and Disclosure Act in the United States.

4. Vouchers must be made out and addressed to the Secretary-Treasurer and contain enough information to enable a check to be issued. A sample voucher is shown at right.



■ Role in Trial Notification

As the official correspondent for the lodge, the Recording Secretary has several responsibilities in connection with trials arising out of charges of misconduct as governed by the provisions of Article L in the Constitution.

- It is the responsibility of the Recording Secretary to notify both the plaintiff and defendant of the decision of the local lodge after a trial case. (See Art. L, Sec. 10 of the IAM Constitution.)

The notification must:

- (a) be in writing;
- (b) be sent by registered or certified mail;

and

- (c) clearly state the penalty imposed, if the local lodge took such action.
- The proper notification must be sent out immediately to comply with both the IAM Constitution and U.S. Federal Law.
 - The IAM Constitution states that the decision of the local lodge may be appealed to the International President within thirty days after the verdict of the local lodge is given.
 - If proper notification is not sent out promptly, the appeal process will be delayed.
 - Copies of all charges should be sent routinely to the International President.

The International President, when kept advised from the very beginning, will be in a position to render a prompt decision based on complete information if the matter is appealed.

■ Role in Local/District Lodge Elections

The Recording Secretary's duties in local lodge elections are to:

1. Review all the Circular Letters from the Grand Lodge which are relevant to election procedures, including the IAMAW Official Policy Regarding Local Lodge Elections. These will provide detailed information on the procedures to be followed in carrying out the provisions of Articles B, C and Article II, Sec. 3 and 4 of the IAM Constitution as well as U.S. Federal Law. You may also check the Local Lodge Election Guide.



NOTE:

Copies of election-related Circulars are included in the on-line version. Check with Grand Lodge or on VLodge.net to ensure you have the latest versions of these Official Circulars.

Sample Voucher



International Association of Machinists and Aerospace Workers

To	Lodge No.	Date	Voucher No.
John Doe	Secretary Treasurer L475	3/31/2018	33118

The Voucher Must Be Kept On File by the Secretary-Treasurer as a Record of His Authority to Issue the Following Listed Checks

IN ACCORDANCE WITH A VOTE OF THIS LODGE YOU ARE HEREBY AUTHORIZED TO PAY TO

Check #	Payee	In Payment Of	Amount
	Local Lodge 475	\$2.00 add-on from Nov. & Dec. 2017	\$1,920.00
2067	IAMAW District 60	Office Rent for March,2018	\$300.00
2068	Charter Communications	Internet & Phone / Acct # 8245 12 626 0064168	\$144.97
2069	Polish Roman Catholic Union of America	Hall Rent for Anderson Global / Mar., 2018	\$50.00
2070	Cox, Arthur	Officers Salary for Mar., 2018	\$204.49
2071	Rabach, Robert	Officers Salary for Mar., 2018	\$196.44
2072	Willacker, Steven	Officers Salary for Mar., 2018	\$57.81
2073	Essenberg, Dave	Officers Salary for Mar., 2018	\$57.81
2074	McIntire, Michael	Trustee Salary 1st Quarter, 2018	\$26.42
2075	Carver, Kevin	Trustee Salary 1st Quarter, 2018	\$26.42
2076	Stanton, Chandler	Trustee Salary 1st Quarter, 2018	\$26.42
2077	Jazdzyk, L. Pete	District Meeting 1st Quarter, 2018	\$92.56
2078	Rabach, Robert	Reimbursement for Tee Shirts	\$25.42
2079	Holiday Inn Jackson, MI	Mich. Machinists Conference- Spring, 2018	\$1,935.84
Total:			\$5,064.80



Download blank vouchers from goiam.org/Vouchers must be completed in full and addressed to the Secretary-Treasurer.

John Rusan

President

Kathy Puez

Recording Secretary

The Constitution Requires All Vouchers To Be Paid By Check

2. Notify all members not less than 60 days before the date when the elections are to be held. In the United States, the election notice must be mailed to the last known address of each member qualified to vote. The notice must specify the date, time and place of nominations for the election and the date, time and place of balloting for an election. The notice must say what time the polls will be open; specify voter eligibility rules; inform members of procedures for obtaining absentee ballots and must include an application for an absentee ballot. This means, for example, that a simple posting of the notice on a bulletin board is not sufficient. However, this requirement regarding election notice by mail does not apply in Canada.

3. As part of the election notice, provide to all members by written communication specific information about who is entitled to receive an absentee ballot and include an application for an absentee ballot (see Article XXII, Sec. 7 for district lodge elections and Article B, Sec. 4 for local lodge elections). Those who are entitled to vote by absentee ballot are:

- (a) Members who reside in outlying districts more than 25 miles from the designated balloting place.
- (b) Members who are at work at the time of the local lodge balloting,
- (c) Members who are confined because of verified illness
- (d) Members who are on leave qualifying under U.S. and/or Canadian family leave laws.
- (e) Working members who are on vacation.
- (f) Retirees more than 25 miles away from their residence on election day.
- (g) Members who are on official IAM business approved by the local, district or Grand Lodge.

(h) Members who are on an employer travel assignment.

(i) Members who are on reserve military leave.

4. Print Ballots. This should be done as far in advance as possible. Make sure that the place and date for the nomination and election meetings are set early so that notification can be sent to the members at least 60 days prior to the date the election meeting is scheduled as required by the IAM Constitution and the Labor-Management Disclosure Act (in the United States).

Send out absentee ballots. Any member entitled to receive an absentee ballot must make a written request, stating a reason outlined above, to the Recording Secretary by delivering in person or by official government mail. All absentee ballot requests for local lodge elections must be made at least 30 days prior to the election. Within five (5) days of the close of nominations or as soon thereafter as the ballots are available, the Recording Secretary must mail the ballot if in consultation with the Secretary-Treasurer the records of the local lodge indicate that the applicant is eligible to vote in the election. The ballot must be sent to the applicant by mail and not delivered in any other fashion.

If the Recording Secretary and the Secretary-Treasurer determine that the member is ineligible for an absentee ballot, the Recording Secretary must notify the member in writing that the request for an absentee ballot has been denied and the reason for that determination. All such denials must be mailed within ten days (10) of the receipt of the absentee ballot request.

5. Collect absentee ballots on Election Day. All absentee ballots must be returned by official government mail to a P.O. Box reserved by the Recording Secretary for that exclusive purpose and must be received by

or before the closing time of the polls by the Recording Secretary accompanied by tellers and observers. They must be turned over to the tellers secured unopened.

6. Publish the results of the election. A tally sheet filled in and signed by the tellers must be turned over to the Recording Secretary. These results must be included in the records of the lodge in such a manner that they may be published separately for each office.
7. Retain the ballots. The ballots and all other records pertaining to the election must be preserved for one year.
8. In modification of the foregoing, depending upon structure or bylaws, a district corresponding officer may rightfully perform the duties in connection with local lodge elections normally performed by the local lodge Recording Secretary.



■ Role in Strike Sanction Requests

The Recording Secretary needs to be knowledgeable of all Constitutional provisions and other established procedures relating to strike action by a lodge. Along with all lodge officers, he or she should be acquainted with policies on strikes set forth in the Official Circulars and with the guidelines provided in the IAM Strike Manual. A Recording Secretary is specifically involved in the following:

- The Recording Secretary is responsible for applying for strike sanction. He or she provides the information confirming that all IAM policies and procedures regarding

strikes have been followed. If a strike vote has been taken at a meeting where at least 30% of those affected by the dispute are present, and if the motion to strike is carried by a two-thirds majority of those present and qualified to vote, the Recording Secretary shall prepare a full statement and history of the matters in controversy as required on the official Report of Strike or Lockout form (available on *VLodge.net*) and forward it to the International President.

- The local lodge, through the Territorial General Vice President, will then be notified by the International President of the Executive Council's decision regarding strike sanction. No strike may be declared by any local lodge without the consent of the International President and the Executive Council.



NOTE:

In modification of the above, the Constitution provides that where agreements are handled through a District Lodge, all forms and reports required in connection with strikes may be signed and transmitted by the District Lodge officers involved.

■ Role in Relation to Bylaws

Bylaws are the “constitution” of the local lodge and must be approved by the International President in accordance with Article D of the Constitution. The Recording Secretary must be concerned with the following requirements relating to bylaws:

1. All correspondence referring to bylaws must be addressed to the International President and clearly marked c/o Bylaws Department. The International President is the only person who has the authority to approve bylaws or amendments. The local lodge seal and the Recording

Secretary's signature must be attached to all correspondence concerning bylaws and amendments.



2. A set of model bylaws for local lodges is available on request from the International President or on *VLodge.net*. This document should always be obtained and used as a guide in drafting any initial bylaws for a lodge. It should also be consulted and followed whenever any substantial revisions to a lodge's bylaws are contemplated.
3. Local lodge bylaws are subject to the provisions of the IAM Constitution and the bylaws of the District Lodge, if any, to which it is affiliated. The local lodge bylaws committee should, therefore, carefully read and consider these documents when drafting proposals, in order that no conflicting clauses are submitted.
4. Bylaws which have been approved by lodge members must be submitted in triplicate to the International President. The covering letter accompanying the proposals should state that the bylaws have been approved by the local lodge membership noting the dates of action, in accordance with the amendment procedure.
5. Copies of amendments to existing bylaws must be sent in triplicate to the International President and clearly marked c/o Bylaws Department. The actual master copy (not a photo copy) of the lodge's bylaws which bears the IAM Headquarters

stamp of approval must be enclosed with the proposed changes. No proposals or amendments will be considered until the master copy is received. There should be no notations or other defacements on this master copy. Only those sections of the bylaws which have been amended should be submitted for approval. The changes which are approved will then be incorporated directly into the master copy and the revised document will be returned to the lodge.

6. Special attention should be given to local and district bylaw changes regarding the salaries of Directing Business Representatives, President-General Chairpersons, Business Representatives, General Chairpersons, Organizers and Full-Time Officers. The normal procedure for making amendments must be followed if any changes in salaries are introduced which require figures in the bylaws to be changed. This includes increases which accrue as a result of wage increases negotiated. For example, if the members receive a 5% increase and the bylaws state that the Business Representative gets the same increase, the 5% must be added to the Business Representative's monthly salary rate in the bylaws. When this has been approved by the International President's office, authorization will be given to the General Secretary-Treasurer to increase the IAM contribution accordingly, and ensure that proper pension payments are credited.

If the salary rate is set up in increments in exact monetary amounts at specified times, no bylaw changes are necessary and no master copy has to be forwarded. For example, the Business Representative might have a starting salary of \$1,000 per month which would be increased, by the amount of \$100 per month at the end of each 12 months' service, to the level of twice the maximum support for Business Representatives' salaries as provided

by the Grand Lodge Constitution. In all cases, whether salaries are established for Business Representatives in exact monetary amounts in bylaws or are based on a set formula for increases, a letter must be forwarded to the International President with the seal and the signature of the official corresponding officer affixed. It must include the Business Representative's name, current rate of pay and the proposed rate of pay in monetary terms, with the effective date of such increase.

■ Preparing Credentials

It is the Recording Secretary's job to prepare credentials for delegates and alternates to State and Provincial Council meetings, District Conventions, Grand Lodge Conventions and AFL-CIO and CLC Conventions. Many important conventions and meetings provide official credentials forms which a Recording Secretary is required to fill out. Where such forms are not provided, a statement such as the following may be prepared: "This will certify that Brother John Doe, Card No. 654321, is the duly authorized delegate of Lodge 2345 to the New York State Machinists' Conference." Signature and lodge seal must be affixed.



KEEPING IMPORTANT RECORDS



■ Filing

The Recording Secretary is responsible for keeping records so that the officers can check back on past events and actions. In the United

States proper filing and record-keeping are particularly important, since the Landrum-Griffin Act requires that pertinent records be kept for five years. Minutes, however, are permanent records of the lodge and must not be discarded.

Minutes are one of the vital records of the lodge, but efficient files on financial records and correspondence are equally important. The IAM Constitution requires that all ballots and election records be kept for at least one year. This is also required by the Landrum-Griffin Act in the United States.

■ Separate Correspondence files should be set up for:

1. All correspondence dealing with lodge business. Letters received by the lodge should be filed, as well as copies of letters written by the Recording Secretary.
2. Official circulars issued by the Grand Lodge.
3. Policy letters issued by the Grand Lodge.

When there is correspondence that cannot be answered immediately because it requires further action, put it in a file called a "pending" or "suspense" file. By checking this file occasionally, the Recording Secretary will be reminded of unfinished matters. In many lodges, files are kept in officers' homes. For home correspondence files, the best equipment is a portable file box and a set of file folders, which are available at any office supply store.

All correspondence and records are the property of the lodge. When the Recording Secretary goes out of office, all files and records must immediately be turned over to the new officers.



CORRESPONDENCE



■ Handling Correspondence

Most letters directed to the local lodge are sent to the Recording Secretary. Since these letters are for the information of all officers and membership, the following procedures should be followed:

1. Open letters when received. An unopened letter might cause the local to miss out on some essential activity which takes place before the next local meeting and which could be authorized by the Executive Board.

Suppose a local in the United States meets monthly and has just held its meeting. A letter is received from the State AFL-CIO asking the local to write, fax, e-mail or send a delegation to the State Capital to lobby on an amendment to the Unemployment Insurance Bill coming up in two weeks. Unless the letter is opened promptly and the matter raised with the Executive Board or President, the local's voice will not be heard on a matter of importance to its members.

2. Route letters to the proper person. Letters should not be left 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, a copy of that letter could be passed on to the Committee Chairperson.

For example, suppose the Secretary receives a letter announcing a new pamphlet for use in getting members registered to vote, this should go to the MNPL Committee Chairperson. The Chairperson can report on the letter at the meeting, along with a recommendation by the committee for action on it. This is a more efficient and more interesting way of handling letters than having the Recording Secretary read them all at the meeting.

When a letter is turned over to a committee, the date it was received and when it was handed over should be noted, and this should be reported to the Executive Board. Copies of letters which have been referred to a committee should be retained in the Recording Secretary's files so that they can be reported on at local lodge and Executive Board meetings.

3. Acknowledge letters that cannot be answered right away. Acknowledgment of letters is important, especially when there is to be some delay before the local can meet and take action. By doing this, your local gets a reputation for efficiency. The letter could simply read:



"Your letter of (date) has been received. The matter will be considered at our meeting of (date) and you will be notified of the action taken."

4. Prepare the correspondence to be read at 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' meeting or Executive Board meeting which should plan an agenda for the meeting in keeping with

the IAM Order of Business for local lodge meetings. At this time the correspondence can be put into some logical order so that letters relating to the same or similar issues can be presented together.

The Executive Board normally makes recommendations for action on important letters. These recommendations are a guide for the membership, although the members make the final decision.

5. Handle letters efficiently at the meeting. Every letter of any importance should be mentioned to the membership. This protects their right to know everything that concerns the lodge.



NOTE:

All official Circular Letters from Grand Lodge Officers should be read in their entirety, because they concern matters about which all members should be fully informed.

6. It is not necessary to read every letter word for word. Correspondence can become a dreary bore for the membership unless common sense is used. Many letters can be summarized in a sentence or two. If letters are not read in full, they should be available on request for interested members to read after the meeting has adjourned.

For example, the Recording Secretary might say: "We have received a notice about the City of Hope program to be held at the Community Center, Broad and Main Streets, 7:30 p.m., July 9." The Chairperson then says: "No action is necessary. If there is no objection, this notice will be posted on the bulletin board." Or as another example, the Recording Secretary might say: "This letter announces the monthly meeting of the State IAM Council on February 25. I will read the last paragraph of the letter which deals with the threat of a 'right-to-work' bill in

our state." After reading from the letter, the Chairperson might then say: "What action do you wish to take on this meeting?"

This form of presentation brings out the main items quickly and clearly and points to the action which the local is being asked to take. It is useful, not only for lengthy or trivial matters, but also for subjects which are so important that only the digest form will ensure the attention and clarity necessary to get intelligent action.

7. However, when a member asks for a letter to be read in full, it must be read. It is also quite proper for the membership to take action on a letter at the time it is read. Often this will save time. In some lodges it is customary for action on a letter to be postponed to "new business," but this is not necessary. It is a good rule to act on most letters right away. Postpone only those letters which involve a complicated or controversial discussion.



■ Writing Letters

The Recording Secretary is the official correspondent of the lodge.

The Recording Secretary must answer letters as directed by the lodge. Before writing a letter, he or she must decide what needs to be said. Often it takes thought to understand the situation clearly enough to get ideas organized. This is the first step. Above all, the letter should be simple and the following points kept in mind:

1. Refer to the date or reference number of the letter being answered.

2. State the subject of the letter and the purpose for writing it in the first paragraph. If writing about more than one subject, state each separately.
3. Explain the important facts or information. Remember that the person who will get the letter is not familiar with the problem or the lodge and needs the necessary facts.
4. Use common, everyday language and short sentences. This will make your meaning clear.
5. Include the Recording Secretary's name and title, together with the lodge number and the address to which a reply may be sent. Affixing the lodge seal to a letter gives it official status.
6. When writing for information, be specific. Make the request simple and to the point. In addition, make sure that all the information needed is being asked for.
7. Send copies of lodge correspondence to all persons who should be kept informed. Usually this means sending copies to the General Vice President and to the appropriate Business Representative, General Chairman or servicing Grand Lodge Representative.
8. Keep copies of all lodge correspondence on file for future reference and local lodge records.
9. Use the lodge seal on all official correspondence and only on such correspondence. The Recording Secretary is the only person in the lodge authorized to be in possession of the seal (Art. D, Sec. 6).

■ Writing within the IAM

When writing to Grand Lodge officers or to others within the IAM, keep the following points in mind:

- Stick to one subject in a letter and state it in the upper right hand corner under the date. This makes it easier to refer the letter

to the appropriate department or person responsible for the particular subject.

- Always include your name and title, the lodge number, seal and the address to which you want the reply sent.
- When corresponding with the Grand Lodge, copies of such correspondence should be sent to your respective General Vice President.



■ Corresponding with IAM Headquarters Departments

All correspondence to IAM Headquarters should be addressed to:

Name of Person or Department
 International Association of Machinists and
 Aerospace Workers
 9000 Machinists Place
 Upper Marlboro MD 20772-2687

For detailed information, visit the "Departments of the IAM" section of the IAM Headquarters website (www.goiam.org). or *VLodge.net*. *VLodge.net* (www.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. Because of the sensitive nature of the information available on *VLodge.net*, access is limited to only certain local lodge officers. Contact VLodge support at 301-967-3481 for information.

■ Other Responsibilities

The above duties give an accurate general description of the job of the Recording Secretary. The specific duties mentioned, however, are only the bare necessities of the job itself. There are many additional responsibilities which are customarily associated with this position. Some of the more important of these responsibilities are:

1. To provide local lodge leadership and guidance as part of the team which includes all local lodge officers. As the person through whom all official activities of the lodge are channeled, the Recording Secretary is in a position to keep the Communicator, Educator, committee members and lodge delegates informed and to assist them in their assigned tasks.
2. To attend all Executive Board meetings and present the communications that have been received; to help decide how they will be presented by local lodge officers in making recommendations to the members; to record a roll call of those present and

to keep minutes of all Executive Board meetings which become part of the permanent records of the lodge.

3. To keep readily available files of minutes, correspondence and reports. The Recording Secretary should assist all committee chairpersons in keeping orderly files of the documents and literature which relate to their responsibilities.
4. The Recording Secretary should keep the local lodge mailing list up to date. The Recording Secretary should work closely with the local Secretary-Treasurer to update membership addresses in your local's VLodge Membership (VLM) recordkeeping software. Address changes entered into the VLM system and sent to Headquarters in the monthly report will be automatically updated in Grand Lodge records. Locals not on the VLM system should notify the General Secretary-Treasurer's office of any known address changes.

Other Lodge Personnel Designated by the IAM Constitution



DUTIES OF 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 an inventory 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. This includes reviewing all vouchers and expenditures to ensure proper approval, union purpose and accuracy. As part of this duty, they are also expected to assist the Auditing Committee, as outlined in the following section, 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 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.



DUTIES OF AUDITORS

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:

1. 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.
2. The Auditors' task includes auditing all supplemental lodge accounts, such as emergency funds, savings accounts, U.S. bonds and building funds.
 3. 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.
 4. The Committee shall 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.
 5. 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.



DUTIES OF THE CONDUCTOR-SENTINEL

1. Checks to ensure that people at the meeting are entitled to attend.
2. Escorts visitors and new candidates in and out of lodge meetings.
3. Guards the door of the lodge meeting and admits those entitled to attend.



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.

1. Establish and maintain an e-mail address to receive electronic communications, alerts and bulletins from IAM Grand Lodge.
2. Download and distribute IAM communications to the membership.
3. E-mail broadcast lists.
4. Utilize the latest communication methods, such as social media, websites, etc.
5. Accept additional communications responsibilities as directed by local or district lodge President.

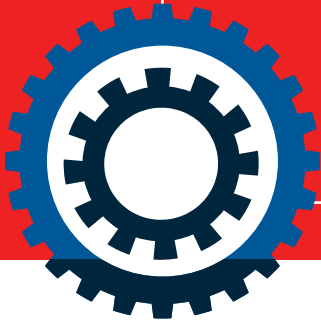


DUTIES OF THE EDUCATOR

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:

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



Executive Board Responsibilities

The officers, as a group, provide the leadership for quality union meetings and a lodge programs which serves and involves membership.

■ Executive Board 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.

Executive Board meetings are set up to do the following:

1. Keep everyone informed — each person reports what they are doing.
2. Consider major problems coming up in the lodge and figure out solutions.
3. Look at membership needs, set up new programs.
4. Discuss what is coming up at the membership meeting and which 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 employees?" "How could we make the union stronger?" In doing this

consider, are there Health & Safety issues, can you help members with out-of-plant issues? What is happening on Human Rights, what is happening legislatively or are there unorganized employees in your area?

■ 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. They also help to get more people involved and participating.

■ Preparing for Good 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.

■ Making the Most of the Steward System

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.



■ 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.

■ 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.



■ IAM 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 money comes from voluntary donations by IAM members.

The IAM has also set up the Canadian Machinists Political League, which works with the labour-backed New Democratic Party.

■ 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.

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 if they are in the bylaws.)

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 twice 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.



NOTE:

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.

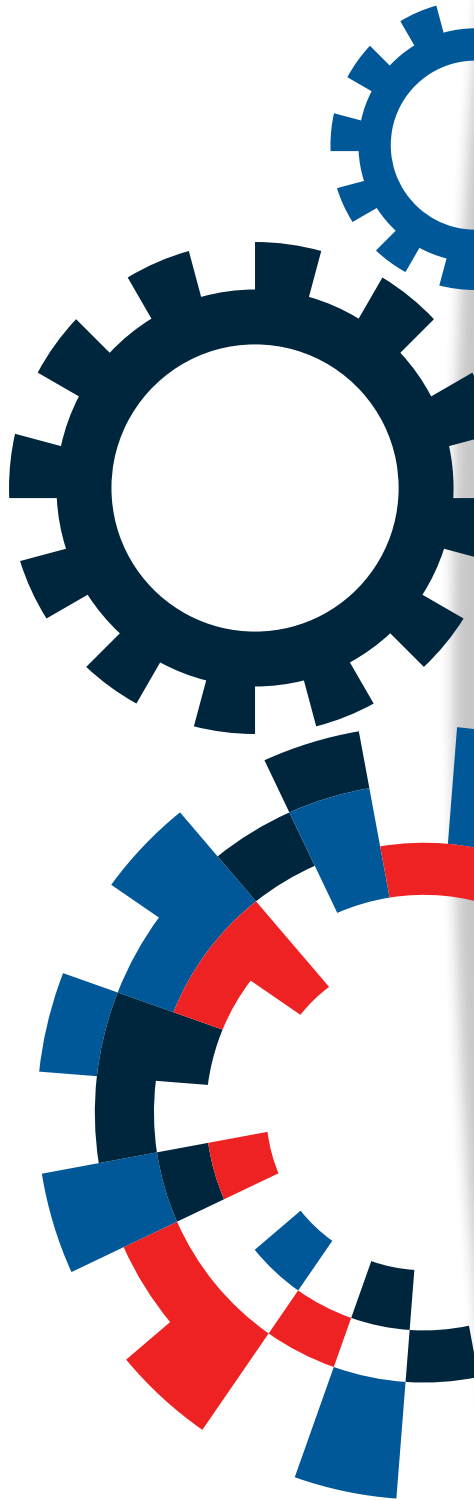
It is worthwhile for officers to spend time in analyzing finances, preparing special reports, and answering members' questions. All this helps members understand lodge financial affairs, so that they can vote intelligently on dues and expense proposals.



Guide to a Well-Conducted Union Meeting



Download the IAM Mobile Spaces app to have the Guide to a Well-Conducted Union Meeting easily accessible. The app is available through both the Apple App Store and Google Play.



ORDER OF BUSINESS

The following is the order in which the items of business should be called for and acted upon at a meeting:

1. Pledge to the Flag.
2. Roll call of officers and noting of absentees.
3. New applications.
4. Report of committee on applications and acting on same.
5. Initiations.
6. Reading of minutes and acting on same.
7. Installation of officers.*
8. Examination and introduction of visiting members.
9. Reports of Secretary-Treasurer, including receipts and disbursements since the close of last meeting.
10. Communications, bills, etc.
11. Reports of committees.
12. Report on Organizing Activities.
13. Anything for the good of the I.A.M.A.W. and discussion of subjects of an economic nature.
14. Unfinished business.
15. New business. Election of officers. *
16. Reports of sick and disabled members and of relief committees.
17. Reports of members out of work and positions vacant.
18. Adjournment.

COMMENT: The Executive Board of the Lodge should plan in advance of the meeting an agenda of matters to be reported on or otherwise brought before the membership.

**These items are only included in the order of business of appropriate meetings.*

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PROCEDURES



DUTIES CALL TO ORDER

Two raps of the gavel – The lodge will be called to order.

Three raps of the gavel – Members will rise.

One rap – Members will be seated.

At the hour appointed the President will give *one rap* of the gavel.

PRESIDENT: “Members, we are about to open the Lodge. All those not qualified to participate in the meeting will please retire.”

All persons not members, will then withdraw.

(Further details on procedure will be found in the IAM Ritual.)



1. PLEDGE TO THE FLAG

PROCEDURE: President leads all present in pledge.



2. ROLL CALL OF OFFICERS AND NOTING OF ABSENTEES

PROCEDURE: Recording Secretary calls roll of Lodge officers. All officers are recorded as present or absent.



3. NEW APPLICATIONS

PROCEDURE: Recording Secretary reads list of new applicants since last meeting.

ACTION FROM FLOOR: MOTION to consider an applicant for membership at present meeting. *(Requires a majority vote.)*



4. REPORT ON APPLICATIONS AND ACTING ON SAME

PROCEDURE: Committee reports in its investigation of each applicant, confirms that legally required Application for Membership has been fully completed (all lodges must use Grand Lodge-provided 8 ½ x 11 forms for the appropriate year, for example, MR0001-07 for calendar year 2017) and recommends acceptance or rejection of applicants.

ACTION FROM FLOOR: MOTION to accept applicants to membership. *(Requires a majority vote.)*



5. INITIATIONS

PROCEDURE: President administers obligation to new members by following instructions given in IAM Ritual.



6. READING OF MINUTES AND ACTING ON SAME

PROCEDURE: Recording Secretary reads minutes of previous membership meeting.

PRESIDENT: "Are there any additions or corrections to the minutes?"

ACTION FROM FLOOR: Corrections are raised, discussed and accepted, if there are no objections. If there is an objection, a majority vote is required to make the correction.

MOTION: To accept the minutes "as read" or "as corrected."

COMMENT: Reading of minutes is important because, once accepted, they become the permanent record of Lodge actions for all future reference.

Minutes should be brief but contain enough detail for the member who was absent to understand what took place.

Minutes should emphasize what was done and decided at the meeting, not what was said. Details of speech, a report or a discussion should be reported only if important to future reference.

The President should ask the Recording Secretary to stand up and make sure that he or she reads the minutes in such a way that all present can hear them clearly.



7. INSTALLATION OF OFFICERS

PROCEDURE: The IAM Constitution requires that the installation of newly elected Lodge officers take place at the first Lodge meeting in January. The IAM RITUAL provides for the following ceremony:

The Past President, or any qualified member designated by the presiding officer, may officiate at the installation of Lodge officers. The members will stand and the officers will escort the officers-elect, each in rank to the rostrum. The officers will stand in the rear of the officers-elect while the oath of office is administered.

PAST PRESIDENT: "Members, do you accept the offices to which you have been elected?"



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OFFICERS-ELECT: We do.

PAST PRESIDENT: Raise your right hand and repeat after me:

Upon my sacred word of honor, I do solemnly promise that I will uphold the Constitution of the International Association of Machinists and Aerospace Workers and faithfully perform all the duties of the office to which I have been elected, so far as I am able; that I will attend all meetings of this Lodge during my term of office when possible to do so; that I will endeavor to advance the interests of the Association and when my successor is elected and installed, I will turn over to him (or her), all books, papers, funds, or other property of the Lodge that I may have. I further promise that I will never defraud this Lodge out of anything whatsoever, or allow it to be defrauded, if within my power to prevent it, to all of this I solemnly pledge my sacred word of honor.



8. INTRODUCTION OF VISITORS

PROCEDURE: Conductor-Sentinel has previously examined, visiting members credentials or has been informed of purpose of non-member's presence.

President takes note of, or introduces, all visitors.

ACTION FROM FLOOR: If visitor is not an IAM member, President must request consent of membership.

COMMENT: If a visitor is there for the purpose of making a brief statement, the President may request consent to hear the presentation at this point in the meeting. If he or she has a longer message or is part of an education program, a later appearance would be appropriate.



9. REPORTS OF SECRETARY-TREASURERS, including Receipts and Disbursements since the close of last meeting

PROCEDURE: The financial report is made by the Secretary-Treasurer, depending upon the Lodge setup.

ACTION FROM FLOOR: Questions for purpose of clarification.

MOTION: To accept the report.

COMMENT: A good financial report should include:

1. Balance on hand as of last day of previous month.
2. Each disbursement and a total.
3. Adjusted balance as of date of meeting.

4. All savings and investment accounts.
5. Total financial worth of Lodge monies.

Financial reports read at meetings are often difficult for a member to keep in mind or to understand. Therefore, the financial officer could consider utilizing presentation software to present highlights of the report while the detailed reports are read.



10. COMMUNICATIONS, BILLS, ETC

PROCEDURE: (communications in general) Communications to the Lodge or written on behalf of the Lodge are read in whole or in part or summarized for the membership by the Recording Secretary.

ACTION FROM FLOOR: Requests for further details or clarification.

MOTION:

- To take specific action, or
- To refer to unfinished or “new” business,” or
- To refer to an appropriate committee

PROCEDURE: Bills, supported by previous vouchers and already approved under the IAM constitution, local bylaws or previous minutes, are read by the Recording Secretary for the information of the members. No further vote is required.

Every bill for expenditures not previously approved by the membership are read by the Recording Secretary with statement of amount, purpose and payee.

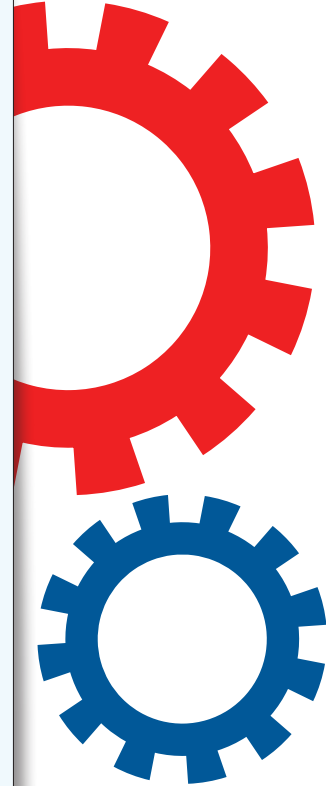
ACTION FROM FLOOR: Requests for further information.

MOTION:

- To authorize payment, or
- To refer back for investigation and later action.

COMMENT: If possible, letters should have been read by the Executive Board or officers before the meeting. Letters requiring action should be read with a recommendation from the Executive Board.

The Recording Secretary can summarize long letters. Routine letters can be announced as received; they do not



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need to be read. However, all communications should be mentioned and made available for interested members to read after the meeting.

A letter on a subject which is the responsibility of some committee may be brought up in the report of that committee.



11. REPORTS OF COMMITTEES

PROCEDURE:

1. The President calls for the reports of the Executive Board and of all other standing or special committees.
2. The Executive Board report may be given by the Recording Secretary or any other Lodge officer and may include all or part of the Committee's minutes.
3. It is customary in many lodges to have the Business Representative or Representatives report at this point in the agenda.
4. Also called for are reports from delegates to other bodies or participants in meetings and programs outside the Lodge.
5. Any of the reports may include recommendations for Lodge action.

ACTION FROM FLOOR: Requests for information or clarification.

MOTION:

- To act on specific recommendations, or
- To postpone action, or
- To refer to the Executive Board or to any other committee for action or recommendations, or
- To refer recommendations to "new business" for action, or
- To receive or accept the report (when no action is appropriate.)

COMMENT: Reports must be carefully thought through beforehand. They should be informative but brief and clearly explain the highlights of the committee's deliberations or the delegate's experience. Recommendations for action should be stated in such a way that they may easily be made into a motion from the floor.



12. REPORT ON ORGANIZING ACTIVITIES

PROCEDURE: President calls for a Report on Organizing Activities by the local lodge.

The report shall be made by the local's Organizing Committee chairperson or member, the President of the lodge, Business Representative or other representative or officer.

ACTION FROM FLOOR: Motions related to organizing can be made under "new business."

COMMENT: Organizing new members must be a primary duty of every local lodge member. The Report on Organizing Activities is the opportunity to let members know what the Local Lodge is doing to organize new members, why it is important and how they can help organize by volunteering for an active campaign or getting leads to the lodge Organizing Committee.



13. GOOD AND WELFARE, discussion of subjects of an economic nature

PROCEDURE: The President asks: "Is there anything under good and welfare?"

At this time anything affecting the welfare of the Lodge may be discussed by a member. Reports on meetings and subjects which had not been planned for the agenda may be made here.

ACTION FROM FLOOR: No motions may be made.

COMMENT: Also appropriate are discussions which permit deliberations on subjects or policies which do not require immediate action or on which the members are not yet prepared to take action.

Whenever action is desired, the matter may be referred to "new business."

This point on the agenda is often used to present a talk or start a discussion on some subject of general interest to the members. The Lodge education committee may have been given the responsibility for conducting this type of session.

The Lodge may wish to set a time-limit for this particular part of the agenda and also agree on time limits on discussion by members.



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14. UNFINISHED BUSINESS

PROCEDURE: The President call for continued discussion of subjects raised by motions made at previous meetings and requiring further action. The Recording Secretary is required to furnish a list of these subjects from previous minutes. The President asks: "What is your pleasure on the matter of _____?"

ACTION FROM FLOOR:

MOTION:

1. To take some action on a subject which has been brought to the attention of the meeting by the President, or
2. To complete action initiated at a previous meeting, or
3. To postpone action to another meeting, or
4. To refer to Executive Board or to some other committee, for action or recommendation.

COMMENT: It is the joint responsibility of the President and the Recording Secretary to bring to the attention of the meeting all unfinished business from previous meetings. A member would be expected to raise an item of unfinished business only if it had been overlooked by the President.

To expedite the business of a meeting and to maintain a consistency which is fair and easily understood, the Lodge should follow the Rules of Order, on page 5 of this guide. These rules are usually sufficient to guide the chair on all motions, amendments, questions and other actions likely to occur in a Lodge meeting. The President should review these rules from time to time in order to become thoroughly acquainted with them.



15. NEW BUSINESS, ELECTION OF OFFICERS

PROCEDURE: The President calls for motions on any new business. The Recording Secretary reports items which have been referred to "new business" from earlier in the meeting.

ACTION FROM FLOOR:

MOTION:

1. To take action, or
2. To postpone action to another meeting, or

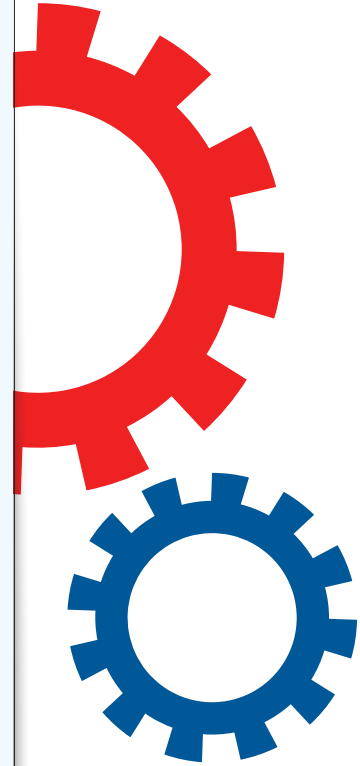
3. To refer to the Executive Board or to some other committee for action or recommendation.

COMMENT: It is at this point that each of the recommendations of the Executive Board (not already acted upon at the time of the report) should be brought before the meeting for discussion and action.

It is primarily under “new” and “unfinished business” that the membership meeting performs its basic function as a legislative body acting on the recommendations of the elected executive officers.

At this point on the agenda, the nominations for Lodge officers shall take place at the first Lodge meeting in November (or 1st meeting in September pursuant to the Local Lodge bylaws). Provided the officers’ terms have expired. Election of officers shall be held at the first Lodge meeting in December (or 1st meeting in October) pursuant to the Local Lodge bylaws.

All Lodge officers should be acquainted with the provisions of Article B of the IAM Constitution governing the nomination and election of officers and all related official circulars and should guide the Lodge in strictly following these provisions.



16. REPORTS OF SICK AND DISABLED MEMBERS AND OF RELIEF COMMITTEE

PROCEDURE: The President calls for the report of the relief or welfare committee. This is also the occasion for acquainting the Lodge with the illness and hospitalization of members.

ACTION FROM FLOOR:

MOTION: To take appropriate action



17. REPORTS OF MEMBERS OUT OF WORK AND POSITIONS VACANT

PROCEDURE: President calls on anyone who is knowledgeable about the current situation relating to the employment of members and to industries and crafts within IAM jurisdiction. Usually the Business Representative will want to report on this subject and may include in his or her report other subjects involving his or her responsibilities or of concern to the Lodge.

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ACTION FROM FLOOR:

MOTION: To refer to Executive Board or to another committee any items in the report requiring action or recommendation.



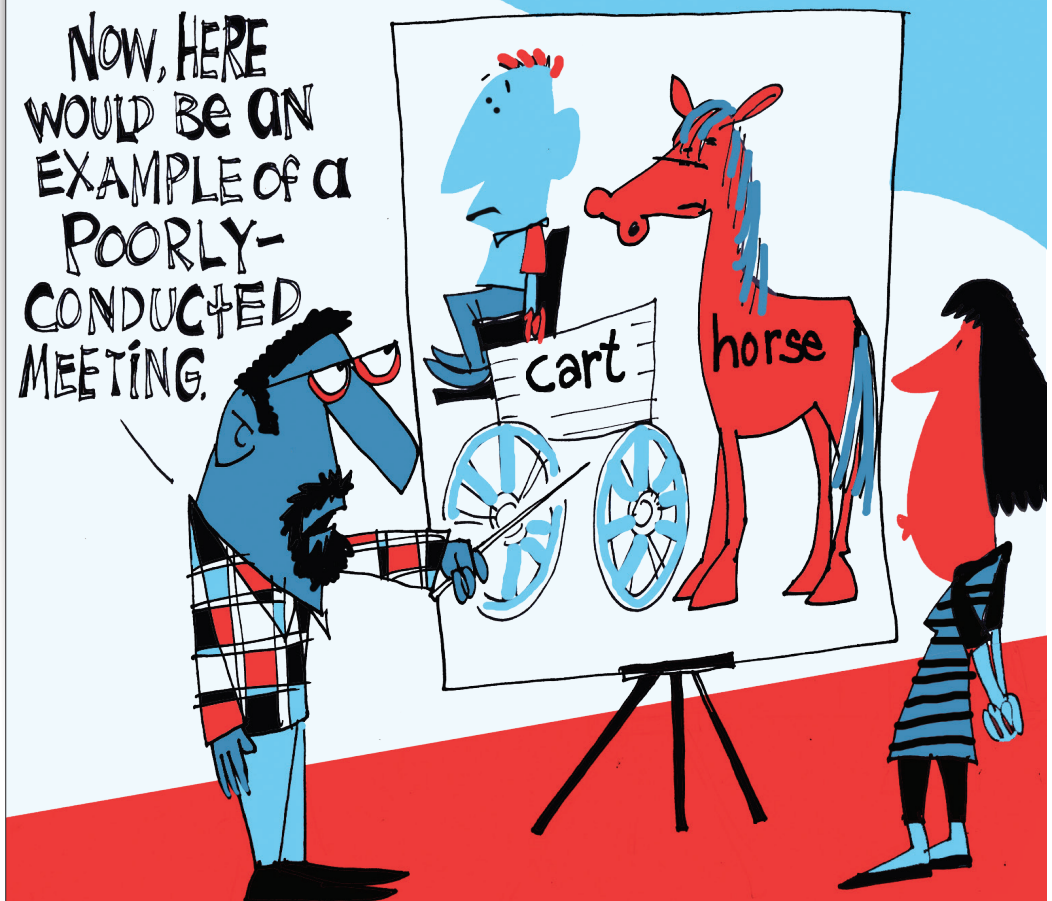
18. ADJOURNMENT

PROCEDURE: When there is no further business, the President may request a motion to adjourn. After vote, President adjourns the Lodge until the date set for the next meeting.

ACTION FROM FLOOR:

MOTION: To adjourn (No debate permissible)

NOW, HERE
WOULD BE AN
EXAMPLE OF A
POORLY-
CONDUCTED
MEETING.

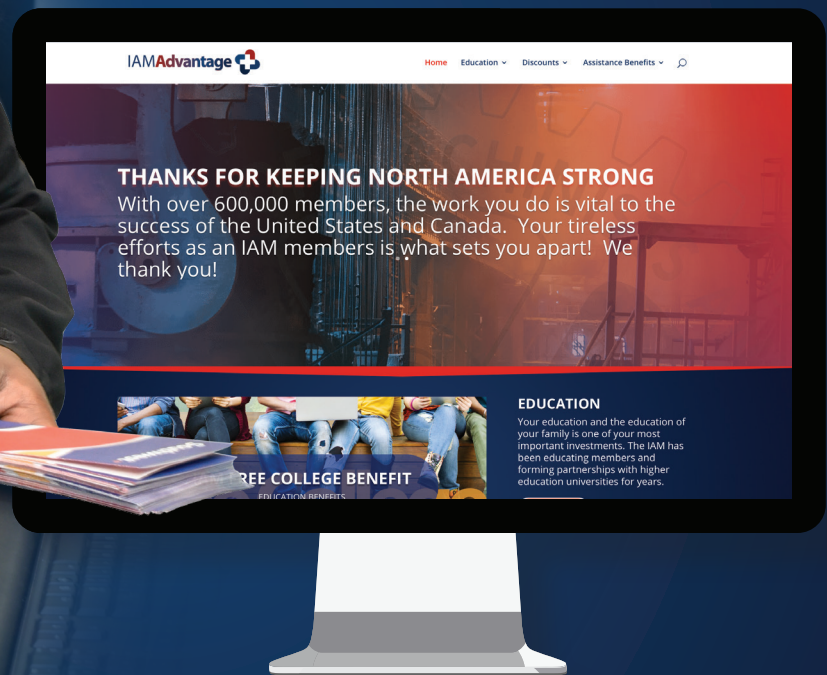




Websites, Books and Resources

DISCOVER THE ADVANTAGES of MEMBERSHIP

There are many benefits, opportunities and discounts available only to union members. If you are an IAM member, you're eligible. For more information, visit IAMadvantage.org.



Education

Your education and the education of your family is one of the most important investments you can make. Visit IAMadvantage.org to learn about the Winpisinger Center, labor scholarships and the IAM Free College Benefit.

Assistance Benefits

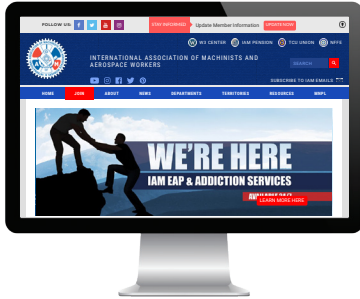
The IAM and Union Plus offer a wide range of services to help members overcome personal, financial and work-related difficulties.

Union Plus Discounts

Union Plus is a nonprofit organization founded by the AFL-CIO in 1986 to provide excellent consumer benefit programs exclusively to current and retired union members and their families.

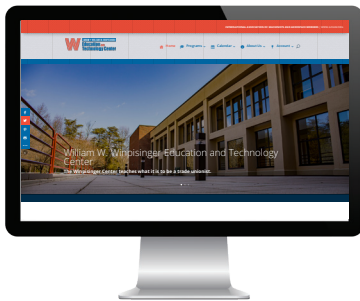


WEBSITES



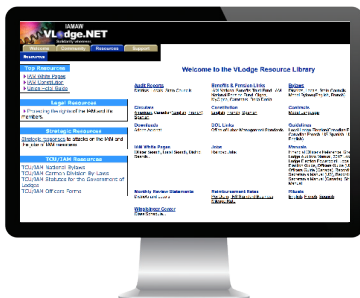
IAM GRAND LODGE | www.goiam.org

The IAM's website features the *IAM Journal* and PDF versions of many additional publications. The IAM's main website also contains videos, the latest news, economic data and a section devoted entirely to organizing.



WILLIAM W. WINPISINGER EDUCATION AND TECHNOLOGY CENTER | w3iam.org

Use the IAM Education and Technology Center site to check class schedules or learn about college credit for classes. Register for the IAM member-only section to borrow by videos, resources and books from the Winpisinger library by mail. You may also use the comprehensive list of Internet resources or join the collaborative learning center.



VLodge | www.VLodge.net

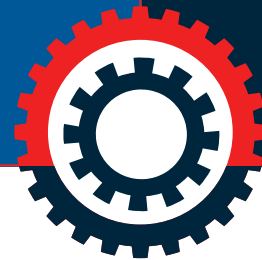
VLodge.net is a service provided by the Grand Lodge that provides information about what is happening in your local, district and territory. The site offers model contract language, resources for your financial officer, Official Circulars, and a listing of available services from the Grand Lodge. Contact VLodge support at 301-967-3481 for information on access and how to register.



AFL-CIO | aflcio.org

The AFL-CIO's comprehensive website contains lots of valuable information that many local lodge committees can use. The new Working Families Toolkit (www.wftoolkit.org) — built by the AFL-CIO — aims to make electing the right candidates easy. This web-based tool offers prebuilt materials for virtually every race taking place around the country.

SOCIAL MEDIA & DIGITAL RESOURCES



FACEBOOK | @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.goiam.org



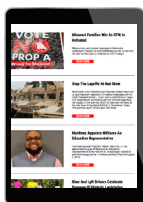
TWITTER | @MachinistsUnion

For up-to-the-minute news about the IAM, you can track the Machinists Union on Twitter. Sign up to follow the Machinists Union at twitter.com/MachinistsUnion, or click on the Twitter icon at the top of any page on www.goiam.org.



YOUTUBE | Machinists Union

The IAM Communications Department produces numerous quality videos on current labor news and IAM history. To access the videos subscribe to the IAM YouTube channel by searching Machinist Union, or click the YouTube icon at the top of any page on www.goiam.org.



iMAIL

Stay up-to-date with your union by signing up for iMail, the IAM’s twice-weekly e-newsletter. It’s completely free! Each issue includes insider IAM news, compelling stories and announcements of upcoming IAM events. Subscribe to iMail at iam4.me/iamemail.



IAM Mobile Spaces App

Download the new IAM Mobile Spaces app to stay up-to-date on the go. The user-friendly interface provides easy access to the IAM’s weekly webcast, Active Live, and the latest labor-related news. IAM Mobile Spaces also offers the highest level of personalization with user notes, a message inbox, weather reports and much more.



PRINT PUBLICATIONS

BASIC IAM PUBLICATIONS FOR LODGE OFFICERS

Available from IAM Headquarters Purchasing Department (301) 967-3428:

- IAM Constitution
- IAM Ritual
- Manual for Lodge Recording Secretaries
- Handy Guide to a Well Conducted Union Meeting
- IAM Strike Manual
- Financial Officers Reference Manual
- Grand Lodge Official Circulars
- IAM New Member Kit
- Minutes Book
- Master Voucher
- Membership Applications
- IAM Merchandise

Available from the Winpisinger Education and Technology Center:

- IMAAW Education Handbook
- IAM Educator Newsletter
- IMAAW Union Educator Training Manual
- The Steward — The Key to Becoming a Successful Steward
- Instructor's Steward Training Manual

Available from the Retirees, Community and Membership Services Departments:

- Community Services in the IAM Guide for Workers' and Retired Members' Programs

For lodges facing layoffs:

- Guide for Union Leaders to Respond to IAM Members Facing Layoffs
- Healthcare Options Brochure

- Decisions and Choices
- Guide to Survive

Available from the Women's and Human Rights Department:

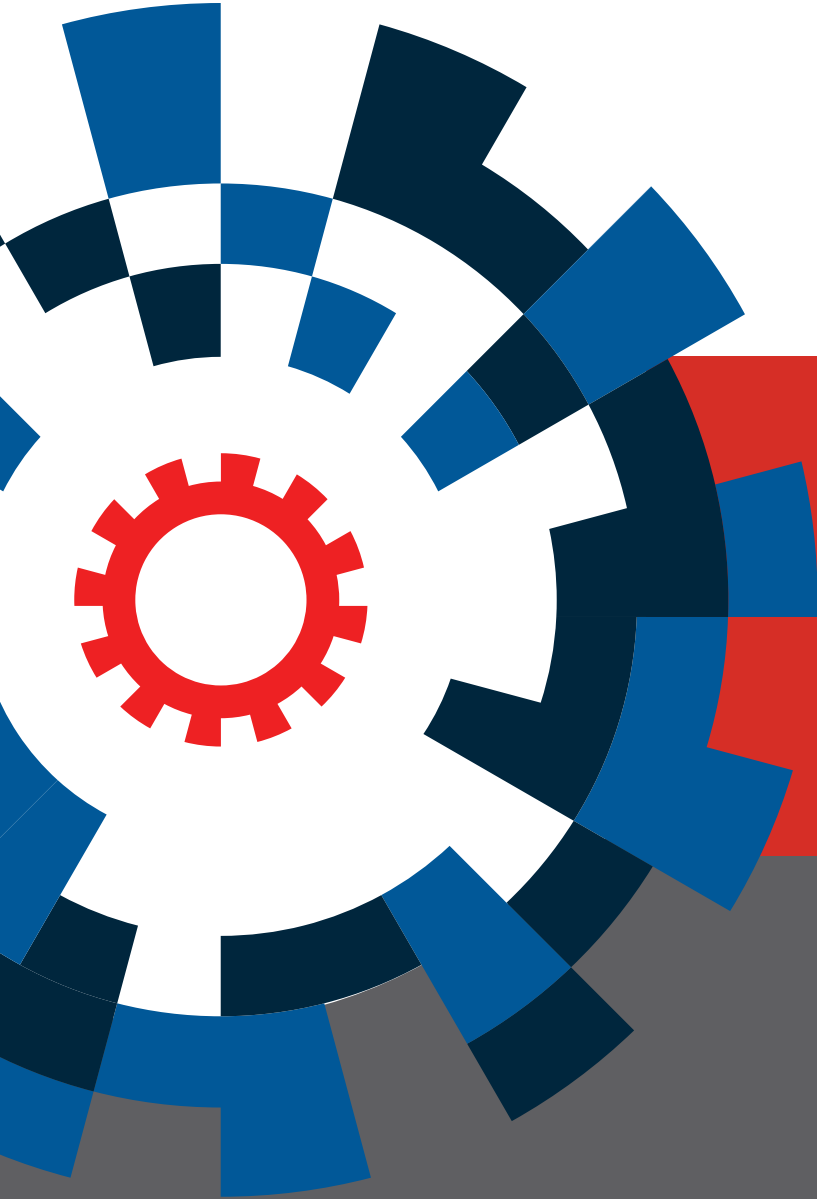
- Human Rights Manual
- Human Rights Action Guide
- Human Rights in the IAM (pamphlet)
- Pocket Guide for Handling Discrimination Complaints
- Women's Program Action Guide

Available from the Legislative Department:

- Directory for the U.S. Congress
- Members Guide to the Machinists Non-Partisan Political League (MNPL)
- MNPL Videos

Available from the OSHA, CREST, Apprenticeship and Scholarships Department:

- Apprenticeship Policy Manual Grand Lodge Scholarship Applications



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