

LOCAL UNION ADMINISTRATION

AN INSTRUCTIONAL UNIT FOR
STATE, PROVINCIAL AND LOCAL
AFFILIATES AS A GUIDE TO
ESTABLISH EFFECTIVE LOCAL
UNION ADMINISTRATION.







TABLE OF CONTENTS

Chapter 1:	The IAFF Local Union President	5
	Administrative Officer	5
	Committees	5
	Written Correspondence	6
	Membership Contact	6
	Presiding Officer	6
Chapter 2:	The IAFF Local Union Secretary	9
	Meeting Planning	9
	Minutes	10
	Correspondence	11
	Communications	11
Chapter 3:	The IAFF Local Union Treasurer	13
	Audits	13
	Bonding Regulations	14
	Per Capita Tax Reports	14
Chapter 4:	The Local Union Executive Board	15
Chapter 5:	Committees in the Local Union	17
	Standing Committees	17
	Special Committees	17
	Rules, Rights, and Responsibilities	17
	Minority Views	19
Chapter 6:	Membership Meetings	21
	Drawing Up an Agenda	21
	Setting Up the Room	21
	Conducting the Meeting	22
	Ending the Meeting	22
	Conflict in Meetings	22
	Costs and Benefits	23
	Resolving Conflicts	23
Chapter 7:	Choosing a Leadership Style	25
Chapter 8:	Six Steps for Effective Planning	27
Chapter 9:	Recruiting Union Volunteers	29
	Motivational Factors	29
	Recruiting Tips	30
Appendix A:	Shift Meetings	31



CHAPTER 1: THE IAFF LOCAL UNION PRESIDENT

To serve as president of your local, means to serve as your local's executive head. Once elected, you must keep in mind that you have been chosen to run your local in accordance with the provisions of the Constitution and By-laws of the International and your local union. Good presidential leadership on your part includes the abilities to overcome mistakes that may lead to the dissatisfaction of your membership, to avoid being taken advantage of by your members, and to provide for the majority as well as the minority of your local.

Your general duties as local union president include:

- Presiding over all meetings of your local, as well as over all of its executive board meetings.
- Appointing all committees provided for in your local's constitution and by-laws.
- Signing all orders and checks that are properly and lawfully drawn.
- Enforcing the observance of the International's Constitution and By-Laws and the constitution and by-laws of your local.

- Supervising the activities of other local union officers and chairpersons of your committees.
- Serving as delegate for your local at the biennial IAFF Convention.

As president of your local you are an elected officer whose duties and responsibilities fall into two categories. Depending on the environment, you will either serve as an administrative officer or a presiding officer. While these two categories have different characteristics, they are not necessarily mutually exclusive. It is important to the success of your local that you recognize your strengths and weaknesses in both categories and diligently concentrate on efforts to improve your knowledge and skills in both of these areas.

ADMINISTRATIVE OFFICER

For you to achieve and maintain a harmonious administration, you must be an effective administrative officer. This means there has to be an understanding by you of each of your other officers and their responsibilities. As administrative officer, it is your duty to maintain open communication

channels with them and your membership as well. Your duties as administrative officer can be classified into one of three different categories: (1) Committees, (2) Written Correspondence, and (3) Membership Contact. Each of these three categories is discussed below.

COMMITTEES

Your local union as an organization functions through its standing and its specially designated committees. These committees are the vehicles by which many of your duties are performed and the mandates from your membership are carried out.

The chairperson of each of these committees may be appointed by you or elected by his' fellow committee members during the committee's first meeting. The chairperson of a committee presides over all committee meetings, even when you are present. It is imperative to the function of your committees that you provide specific instructions to each chairperson as to his committee's projects and assignments.

¹ For purposes of simplicity, whenever the masculine gender is used in this manual it should be assumed to include both male and female fire fighters.

You should also be kept abreast of each of your committees' activities and work. Depending on your local union by-laws, you may be a member ex-officio of each committee. If so, you are allowed to attend all committee meetings and participate as a voting committee member as well.

If you are not a member ex-officio or if you are a member ex-officio of each committee but unable to attend all committee meetings, you can still be kept informed of each committee's progress through a required written activity report. These reports include a summary describing any actions taken and advancements made by the committee. It is important that you keep this type of extra curricular work in mind when selecting your committee members and appointing your committee chairpersons.

WRITTEN CORRESPONDENCE

Another mark of an efficient administrator involves promptly responding to each piece of correspondence you receive. Your response provides you with an opportunity to have personal contact with individ-

ual members, your community, and the International as well.

Keep in mind that your written correspondence is useless unless it is properly acted upon. This begins with opening each piece of mail, reading the item carefully, following through with any required action, and distributing the information to the appropriate officers and committees.

The letters you write as president are important too. The permanence of your written response and a failure on your part to adequately or appropriately express your ideas could result in an unfortunate situation. Make sure that you choose your words carefully, proofread your final copy, and maintain filed copies of your correspondence for future reference. Your District Vice President should also be sent a copy of all of your correspondence with the IAFF, excluding routine reports and answers to questionnaires.

MEMBERSHIP CONTACT

One final administrative duty of your presidency concerns contact and involvement with your

membership. Not only are you president of your local, but a member as well. Consequently you should be involved with all aspects of its activities. It is important that you know the members of your local by name and personally talk with them to gain their ideas, input, and suggestions.

PRESIDING OFFICER

Your duties as presiding officer deal mainly with your qualifications for effectively running a meeting. Continued mistakes on your part as presiding officer can often times lead to personal dissatisfaction among members who may feel that their meeting rights have been improperly taken away. To avoid this situation, every meeting you preside at should have a well thought out plan and purpose.

To effectively plan for a meeting requires you to develop an agenda in conjunction with your local union secretary. Be sure that the agenda has been developed so that it accomplishes definite objectives. Your personal agenda should be detailed with notes of speakers, reports, and discussion points.

Any items of unfinished business which are to come before your membership should also be noted in the agenda. New business items, including any recommendations from your executive board, will require advance planning as well. When planning these business items consider who will introduce and explain the item, who will answer the questions or responses from the membership, and what will be the board's involvement in the "Question & Answer" period.

Be sure to verify that any final reports due from your committees are promptly submitted in writing in order for them to be organized in time for the local union meeting. Prior to the meeting, decisions on the format and content of each committee report and recommendations have to be completely organized and outlined for presentation to your members.

Running the actual meeting itself will require you to accomplish several different tasks simultaneously. Listed below are each of the tasks you will need to accomplish:

■ **Promptness** - Your local union meetings should always begin on time and last no longer than one hour. Any meetings lasting more than an hour should include a brief break in the schedule.

■ **Documents** - You should always have a recent copy of the International Constitution and By-Laws, a recent copy of your local's constitution and by-laws, a copy of the Manual of Common Procedure and Related Subjects, and a copy of your local union's contract in front of you for reference.

■ **Maintaining Order** - Your members may address the meeting only after you have given them the floor. Never forget that you decide WHEN a member will speak, not WHETHER a member will speak.

■ **Debates** - You must never allow debating to result in personal abuse or the questioning of members' motives. It is your responsibility to see that a debate is orderly and on the issue.

■ **Setting an Example** - You must always set an example for all your members by obeying the International's Constitution and By-Laws and you must refuse any motions made contrary to any provision of this document.

■ **Adjournment** - You must not only adjourn a meeting when the time stated for adjournment is reached, but also when the meeting becomes unruly to the point that it is impossible to proceed in an orderly manner, or when hazardous conditions occur (i.e., fire, earthquake, flood, etc.)

■ **Information** - Every member of your local has the right to request information concerning motions, as well as inquire about the activities of each officer and committee. When answering any questions your members may have, confine your answers to factual information. If you do not know the answer to a question, tell the member you will find out for him and make every effort to obtain the answer as soon as possible.

■ **Voting** - As a member of your local, you have the right to vote. However, no member, including the president, can be forced to vote.

While serving as president, you should always be aware of the fact that you are representing your local union. It is your duty to maintain the dignity of your office in every possible way, including how you express yourself, how you conduct yourself, your appearance, and the example you set. A successful presidency on your part can result in numerous rewards, including personal growth, depth in your knowledge and understanding, greater clarity in your thinking, and awareness of the relationship of a president to his members.



To serve as secretary of your local, you must act as its primary communications specialist. Communications among your officers and members is vital to the functioning of your local union. Unless there exists a good network of communication within your local, misunderstandings will occur. These misunderstandings create inefficiency and cause trivial matters to become magnified, which in turn lead to membership resentment and dissatisfaction. Dedication to your duties as local union secretary will safeguard against the possibility of carelessness, neglect, and unfortunate circumstances.

Your general duties as local union secretary include:

- Keeping custody of all documents, records, books, and papers belonging to your local, except as otherwise stated in your local constitution and by-laws.
- Keeping an accurate record of your local union and executive board meetings.
- Attesting all official documents with your signature and seal of your local.

- Conducting correspondence of your local.
- Maintaining an accurate and current list of members in good standing.
- Executing and maintaining records of reports that are filed with federal and state authorities.

As secretary of your local, you are an elected officer whose duties and responsibilities fall into four categories: (1) Meeting Planning, (2) Minutes, (3) Correspondence, and (4) Communications. While these four categories have different characteristics, they are not necessarily mutually exclusive. It is important to the success of your local that you recognize your strengths and weaknesses in each category and diligently concentrate on efforts to improve your knowledge and skills in each area.

MEETING PLANNING

Every meeting of your local should be planned in detail. Your planning should begin by developing an agenda in collaboration with your local union president. You and your president must prepare all items of business, making sure all recommendations and motions are in the correct language and their intent is

not contrary to your local's or the International's Constitution and By-Laws.

Time should also be given serious attention when planning a meeting. Research indicates that the attention span for most people is approximately one hour. If your meeting should happen to go over this limit, a small break should be provided at the end of the hour.

As secretary of your local, not only are you responsible for having the following documents at every local union meeting, but you should be familiar enough with their contents to find any requested information quickly and easily:

- the Minutes Book,
- the Reports of Committees Book,
- a copy of the International's Constitution and By-Laws,
- a copy of your local's constitution and by-laws,
- the parliamentary procedure manual adopted by your local union, and
- the Manual of Common Procedure and Related Subjects.

MINUTES

A vital function of your job as local union secretary is record keeping. Your most important record keeping task is maintaining the minutes of your membership meetings. Some guidelines you should observe when recording the minutes of any meeting include the following:

- You should use a stenographic notebook for your rough notes. Immediately following the meeting, these rough notes should be used to write the final minutes into the Minutes Book.
- Record the minutes in ink (permanent pen ink, typewritten, or computer printed) and keep them in hard-bound volumes because pencil written and loose-leaf records (three-ring binders) can easily be changed.
- The time, day, month, and year of the meeting, who presided, the fact that a quorum was present, and the number of members present when the meeting was called to order should be recorded.

- Reports of committees should be entered in the minutes only by reference to the fact that such a committee did report. If there are committee recommendations, these should be entered with the vote taken on each recommendation. The complete report of the committee should not be entered in the minutes. The report itself should be kept along with other committee reports in a separate, loose-leaf binder.
- All motions made, seconded, and stated by the Chair should be included in the minutes. The fact that a motion was defeated does not change this requirement. The number of votes for and against, and if a vote is taken by raising the hand, standing, or ballot should always be entered. If a voice vote is taken the entry should be, "The motion was adopted ...", or "The motion was defeated ..."
- When recording any motions in the minutes, you should read back the motion until the person making the motion is satisfied with its wording. Record the

name of the person making the motion as well.

- All rulings of the Chair concerning points of order, as well as points of order themselves should be entered in the minutes. As secretary, you have the right to ask the Chair to have the member raising a point of order to put it in writing. Questions of privilege and the decision of the Chair should be entered, as should appeals taken from such decisions.
- The minutes are to reflect what was done in the meeting and not what was said. No member has the right to request that his views on any matter be "placed on record." The only way that member's views can be recorded is by a roll call vote, which means that all members are recorded.
- Your personal reaction to the proceedings should never appear in the minutes. The factual situation should be recorded.
- The minutes should be brief and reflect what

was done in the meeting.

- If a quorum is not present, or a scheduled meeting not held, a page should be typed listing the time, day, month, and year that the meeting was not held and the reason for not conducting it.
- The executive board minutes are kept in the same manner as the minutes of a membership meeting.
- All minutes must be signed by the person who recorded them.

Any member of your local in good standing has the right, at reasonable times, to read the Minutes Book. (Only members of the executive board have the right to view the Executive Board Minutes Book). However, this does not mean that your books and files can be taken from your custody. A member must read the Minutes Book in your presence.

If your local has shift meetings, then you need to be aware that each shift meeting has its own set of minutes. Except for the purposes of taking a final action vote, the minutes

by shift are always separate events. The results of a vote for one shift are never announced in another shift meeting until the voting process has been completed. (For more information on shift meetings, refer to Appendix A).

Remember that your permanent file of pending business, reports of committees, and minutes are of great importance to both a temporary successor (when needed) and to your successor at the close of your office. Your permanent files are not your personal property, but the property of your local. Upon leaving office, you are required to turn over all books, papers, and other property of your local union that may be in your possession.

CORRESPONDENCE

Every local union secretary should be familiar with two different types of correspondence. One type requires consideration by your membership in the form of a motion and a vote, and the other type includes information that can be supplied from your records. Any correspondence requiring membership action should be placed in your

records and read during the "Order of Business" at your next local union meeting. Any correspondence requiring information (i.e., questionnaires) from your files should receive prompt attention and be completed as accurately as possible.

When sending any correspondence to the IAFF, keep in mind that all matters pertaining to the International's Constitution and By-Laws, proposed amendments to your local union by-laws, and questions regarding interpretation of any of these documents should be addressed to the International General President. Any correspondence concerning monies should be addressed to the International General Secretary-Treasurer. Copies of any important correspondence that you send to the IAFF should also be mailed to your District Vice President.

Because the IAFF corresponds with its members via its magazine, *International Fire Fighter*, one of your responsibilities as secretary of your local is to maintain an official list of your local union membership, including each member's name and

current address. Without this information, the International is unable to distribute the *International Fire Fighter*. Since this magazine is delivered as second class mail, if it is returned to the IAFF due to an incorrect address, the IAFF will be charged by the Postal Service. Therefore, it is also your duty to notify the IAFF of any member's change of address.

It is also your duty to promptly mail, to the International, the names, addresses, and member numbers of all those elected or re-elected to office. This information is used by the International as the basis for mailing material concerning issues affecting your local union.

When corresponding and preparing letters to be mailed to the IAFF, keep in mind that:

- All correspondence should be dated the day it is sent out in the mail.
- All incoming mail is date-stamped by the receiving department when the letter reaches International Headquarters in Washington, D.C.
- Mail is not received on Saturday, Sunday, and

holidays by the International.

- The different times that exist between various zones may result in the delivery of a letter the day following expected delivery.
- Although officers and employees may be at International Headquarters, you can only be assured that someone will be available at the front desk from 8:30 a.m. to 5:30 p.m. (EST) to receive mail.
- The omission of a zip code, an incorrect zip code, or the failure to submit a change of address adds up to a costly waste of financial revenues for your local and the International.

COMMUNICATIONS

Although much of the material sent from the IAFF to your local is addressed to the secretary, it is your responsibility to follow-up with the communication and direct it to the appropriate union officer. Be sure to assess the context of the material carefully for its main points and pay particular attention to details to determine if the information should be presented to the membership.

You should always confer with the president concerning all material to be distributed to your membership. Together, you should agree on the format and exact distribution procedure to assure that all your members are exposed to the material and that a reasonable and logical effort is made in your attempt to inform everyone.

If after you have assessed the material and deem it necessary to be read at a meeting, be sure that you are thoroughly prepared for its delivery. Check the main points carefully and make sure they are well understood. While talking, you should look at the members and always encourage questions. Care should also be given to the speed at which you read the material and your volume should be adequate for all your listeners.

There are times when you may find it necessary to summarize some of the longer material that needs to be read to your membership. Any rewrite to condense the substance

of any material should be done using carefully chosen words in order to convey the same message. Any summarizing on your part needs to also be agreed upon with your president.

The IAFF magazine, *International Fire Fighter*, contains a large amount of information that can be utilized by your local. Any major event pertaining to fire fighters throughout the United States and Canada is recorded in this publication. As secretary of your local, you should be aware of the information provided in the column, "From the Secretary-Treasurer's Desk." This column reviews information that is important to all local union officers.

The IAFF strongly suggests that you maintain a file of these publications with cross references to subjects that might be referred to from time to time. It is recommended that a system or committee be established to organize and file this information for future referencing. As local union secretary,

you will find this to be a valuable time saving tool as well as an important source of information.

If performed properly, your duties as local union secretary can enhance the effectiveness of your president and your local union, and even though your responsibilities can be demanding at times, your successfulness can result in numerous rewards for yourself as well.

Accurate financial records are not only good business practice, but a requirement of the International's Constitution and By-Laws, federal laws, and the Internal Revenue Service. Your duty as local union treasurer² is to keep an appropriate record of all financial transactions of your local. This will require you to maintain all receipts such as income from dues, investments, and interest on bank accounts. It also includes a complete accounting of all expenditures, such as per capita tax to the IAFF and sums paid to state or provincial associations.

Your general duties as local union treasurer include:

- Receiving all money due your local and insuring that all funds are deposited in your local's checking account on a frequent basis.³
- Disbursing all money owed by your local.⁴

² Thus far, this material has assumed that the offices of local union secretary and local union treasurer are separate. However, due to the size of some locals, these two offices are oftentimes combined. If this is the case for your local, keep in mind that the duties and responsibilities of the combined offices are still the same.

- Maintaining a current record of members with their dues payments, assessments, and all financial transactions.
- Exhibiting receipts and vouchers upon audit of your books.
- Forwarding your local's annual audit to the International General Secretary-Treasurer.

As treasurer you are an elected officer of your local whose duties and responsibilities fall into three separate categories: (1) Audits, (2) Bonding Regulations, and (3) Per Capita Tax Reports. While these three categories have different characteristics, they are not necessarily mutually exclusive. It is important to the success

³ Good accounting practices recommend that the person writing the checks not be the person accepting and depositing the receipts. However, most locals do not have the luxury of extra people to record and make bank deposits. As such, it would be helpful if the Trustees reviewed the receipts to see that all the funds that are expected are deposited.

⁴ All disbursements should be done by voucher, signed by your president, and in conformity with a vote of your local, or by checks that have been signed by your president. Disbursements should never be paid in cash and checks should never be pre-signed. You should also verify that all disbursements are backed up by proper documentation (i.e., receipts, vouchers, membership meeting minutes, etc.)

of your local that you recognize your strengths and weaknesses in each category and diligently concentrate on efforts to improve your knowledge and skills in each area.

AUDITS

The International Constitution and By-Laws stipulate that the books and accounts of all of its affiliates must be audited on an annual basis. Your local union president is responsible for seeing that this audit is completed. Depending on your local's constitution and by-laws, your trustees, an audit committee, or an outside Certified Public Accountant will perform the audit. As treasurer, it is your duty to forward this audit report to the International Secretary-Treasurer, over the seal of your local, no later than 180 days after the close of the fiscal year.

You are also responsible for submitting your books for inspection at the request of the Internal Revenue Service and the United States Labor Department. It is not uncommon practice for the Labor Department to spot-check the books and records of International

Labor Unions and their affiliated organizations. The IAFF Secretary-Treasurer also has the authority to request an audit of your books, accounts, and membership records at any time.

BONDING REGULATIONS

All United States federal and industrial unions are covered by the Labor-Management Reporting and Disclosure Act (LMRDA). LMRDA stipulates that unless your local's property value and annual receipts are less than \$5,000 in value, then every officer and person who handles funds or other property of your union must be bonded. The minimum bond allowable must cover 10% of the funds handled by each of your officers. The maximum bond required by law for any one person in any one union is \$500,000.

The IAFF provides bond coverage for all of its affiliates in the amount of \$2,500. This amount satisfies the 10% requirement if the funds or property of your local do not exceed \$25,000 annually. If your local's funds exceed this amount, then it MUST increase its coverage to comply with the law. Your local may also

wish to have coverage greater than 10% of its funds. In either case, additional coverage can be obtained through the IAFF's agent at a reasonable rate. To obtain additional coverage or to have any questions answered regarding the bonding requirements of your local, it is recommended that you contact the International General Secretary-Treasurer's office in Washington, D.C.

PER CAPITA TAX REPORTS

The task of correctly completing the per capita tax report is one of the most important functions of your office. As treasurer of your local union, you are responsible for completely filling out the per capita tax report, signing it, making sure it is sealed by your officers, and sent to International Headquarters each month.

The per capita tax report is the only way that the IAFF has of knowing who the members of your local are. This report is the basis for issuing membership cards as well as constituting the source of representation of your local at the biennial IAFF Conventions. It also provides the information necessary for the mailing of

the IAFF magazine, *International Fire Fighter*.

Accuracy is essential in making out the per capita tax report. This includes the spelling of members' names, addresses, and zip codes. It is also important to be accurate in reporting new members, members' address changes, retired members, active retired members, members on military leave, and deceased members.

If you are a treasurer for a local that is paying 1/2 per capita tax on retired active members, your local is required to file annually, with the January per capita tax form, an affidavit signed by your president, secretary, and yourself. This affidavit should list and certify those members who are retired and maintain active membership.

The International Constitution and By-Laws requires that all its members pay dues on a monthly basis. If a member fails to make his dues payment by the fifteenth day following the month that the dues are payable, then it is your duty to notify the member that he is delinquent and that he will be automatically suspended if payment is not made within sixty days

following the notification. You are also responsible for making a monthly report to the International of any members who are delinquent in their dues. A space on the back of the per capita tax form is provided for this.

Each member of the International is also issued a membership number that appears on his membership card. This number is used for identification purposes and prevents mistakes when there are several members with the same first and last names. The per capita tax report has the words "card number" in several different places. It is your duty as treasurer of your local to be sure that these numbers are included in the reports.

As treasurer of your local, you serve as its financial record keeper. The accuracy of your business reports should not be looked upon simply as a requirement of your job, but a good practice of business as well. While your paperwork may seem tedious at times, your job is still as vital to the functioning of your local as that of the office of the president and secretary.

Under the provision of your local union constitution, your executive board is the governing body of your local when called into session by your local union president between local union meetings.

Your local union executive board is a standing committee and as such should function as any other standing committee. In general, this means that the chairperson of the executive board can make motions from the chair, discuss them, and vote on them exactly as any other member of the executive board. Also, any motions made during the executive board meeting do not require a second.

One of the responsibilities of your executive board is to submit reports of its activities to the membership at regular meetings. A distinction should be noted between your executive board's report and its minutes. The minutes of your executive board should only be read at subsequent executive board meetings and never read at a membership meeting. The executive board report, on the other hand, contains recommendations by the board or actions taken under the

authority of your local union's constitution and should be read to the membership.

Your local union executive board must have a chairperson as well as a secretary or clerk. In most cases the local union president and the local union secretary perform these duties. However, it should be noted that it does not have to be practiced in this manner. The important point is that someone presides at each executive board meeting and that a record is made of the action taken during each meeting.

As is the case with other standing committees, your local union's executive board should function through its subcommittees. These subcommittees can consist of one or several persons depending on the number of members on the board and the nature of the assignment. The president or chairperson of the executive board has the authority to appoint himself or to select a subcommittee to perform a certain task. Each of these subcommittees should report only to the executive board and never to your local union membership during a meeting.



Your local union as an organization functions through its standing and specially designated committees. Under the direction of the local union president, these committees perform the investigative and research work on motions and policies prior to a vote by the membership.

STANDING COMMITTEES

Standing committees can either be elected by your membership or appointed by your president to serve for a definite term as described by your local union by-laws. Every item referred to a standing committee must be reported out before the end of the administration of which it is a part (no item can be held over from one administration to the next.) The foremost standing committee in your local is your executive board. The authority of your executive board is set forth in your local's by-laws and its quorum is established with your president as chairperson of the board.

SPECIAL COMMITTEES

Special committees are also elected or appointed as required by your local's by-laws. They are estab-

lished to accomplish a specific task then dissolved when their final reports are submitted (unless discharge requires a membership vote.) A special committee is created by a motion that should include the selection process of its members, the number of members, and the date its final report is to be given. Your local union president oversees the work of each special committee and provides specific directions to each chairperson. It is the responsibility of the local union secretary to transfer all necessary materials to each special committee chairperson. Upon receipt of these materials, the special committee chairperson is responsible for these materials until the final report is submitted, with all materials then transferred back to the local union secretary.

RULES, RIGHTS, AND RESPONSIBILITIES

Some general rules, rights, and responsibilities that will govern the committees of your local include:

- Committee meetings are much more informal than local union meetings. Committee members have the right

to speak as many times as they want on a subject, and if he chooses, the committee chairperson can make motions while presiding. Also, any motions made during a committee meeting do not require a second.

- A committee can consist of one or more individuals. However, care should be taken that the committee is held to a small number. Committees for action usually consist of one to three members, while committees whose object is to deliberate usually consist of five or more members.
- The committee chairperson is responsible for preparing for a committee meeting in the same manner a president prepares for a local union meeting. The chairperson needs to contact each committee member to confirm their availability to attend and to brief them on the purpose of the meeting. Adequate preparation on the chairperson's part also includes insuring the attendance of each subcommittee chairperson with their written reports.

- When preparing for a committee meeting, the chairperson must make sure that the reading and adopting of the minutes of the previous committee meeting, the reports of each subcommittee, and any unfinished and new business will be taken care of during the meeting. The chairperson is also responsible for insuring that a record of the committee meeting's proceedings and the delivery of a written activity report of the committee's actions and progress are completed as well.
- Unless they are committee members, members of a local do not have the right to attend a committee meeting. The only exception to this mandate is if the member is invited to address the group and then is excused for the committee's discussions and voting activities.
- Committee meeting minutes are only read before the committee and never before the local union membership. Members of a committee should also refrain from discussing the proceedings and actions taken by their committee with other members of the local until the final report of the committee is delivered.
- A committee has the option of creating a subcommittee. A subcommittee consists of members of the committee appointed by the chairperson. The chairperson's responsibilities to his subcommittees are the same as that of a local union president and secretary to their committees in that the chairperson must provide specific directions and delivery of necessary materials for the assignment.
- It is essential in committee meetings as it is in union meetings that there be a quorum present. The quorum for a committee should be one that can be achieved. It is self-defeating to establish a quorum so large that for practical purposes it prevents a legal meeting of the committee from taking place.
- Committees determine their actions by a majority vote of the quorum present. Majority vote in this case means a majority of those voting and not necessarily a majority of the committee members. For example, assume a committee of five members has a quorum of three. On a given matter, two members vote in favor of an action and one opposes it. This is a legal vote of the committee even though, in this case, only two of the five committee members voted for the motion.
- There can be no proxy voting at a committee meeting. The only votes counted are those of individuals present who desire to vote. As with local union meetings, no one can be forced to vote.
- In most instances, the final report of a committee is read by the chairperson to the membership. If the chairperson has voted against the motion at the committee meeting, he may want to be free to oppose the committee action when it comes before the local union membership. In this type of situation, the chairperson may designate another committee member to give the report.
- Following the reading of the committee report, the chairperson moves its adoption unless the report contains several recommendations. If so, then each recommendation made in the committee report is open for debate and voted on separately.
- In the event a committee does not function and fails to submit a report, your local union membership has the authority to dissolve the committee by a motion and a vote. A vote to dissolve a committee requires a two-thirds vote unless your membership has received an advance notice concerning the committee's discharge. In a case such as this, a majority vote is required to dissolve the committee.
- All final reports of a committee should be in writing and signed by each committee member in favor of the report.

MINORITY VIEWS

“Minority Views” gives those members of a committee who do not support a final report or a set of committee recommendations an opportunity to have their opinions presented before your membership. During a local union meeting, following the committee’s report, a member of the committee minority requests to be recognized in order to read the minority views. Officially stated, the minority request is, “... that the minority views be substituted for the the committee report.” The floor is then opened for debate on both the committee’s final report and

the minority views. At the completion of the debate the membership votes to substitute the minority views for the committee report. If a majority of the membership votes for the minority views, the committee report is dropped and the minority views then become the committee report.



Oftentimes you will hear your members expressing that they have too many demands and too many other ways of spending their time than to bother attending a membership meeting that is dull, too long, and has no purpose.

Unfortunately, many members do not take a great deal of interest in their local union. In most circumstances, you will find that attendance at your membership meetings is highest when elections are being held or when your contract is up for ratification.

Since it is impossible to have an election or contract ratification for every meeting, it is up to you to plan an agenda that will attract the interests of your members. Ideally, your membership meeting should require some sort of action from its participants and questions should be discussed that your members need to decide on.

When planning your membership meeting, keep in mind that you don't have to follow the same old routine each time. No rule exists that states the format of your membership meeting has

to always be the same. For example, consider having a:

- **Presentation** - Invite a speaker to talk on a specific topic.
- **Workshop** - Have your members learn a new skill.
- **Problem-Solving Session** - Present a problem and enlist ideas on how to solve it.
- **Debate** - Present and discuss opposite sides of an issue.
- **Research Session** - Bring in people with information to share on a subject.
- **Party** - Celebrate an event or "thank-you" for a job well done.

DRAWING UP AN AGENDA

Once you have made a decision on the topics to be presented and on the format of your meeting, you will need to prepare and circulate an agenda among your membership. Your agenda needs to be distributed three to five days in advance of the meeting. If it goes out too early, it might be forgotten or lost. If it goes out too late, your members may not have a chance to consider the topics or make logistical arrangements (i.e., baby-sitting).

If there is an important topic to discuss, you may want to consider devoting an entire meeting to it, rather than attempting to crowd too many items onto the agenda. People do not like meetings that are long, tiring, and boring. If a member attends an "endless" meeting, he may decide not to come back.

To prevent your meetings from becoming too long, put an ending time on your agenda and stick to it. Many members are not willing to attend meetings that are open-ended because they feel it may take up their entire evening. Your members will be more willing to attend a meeting that they know will be lasting for only an hour to an hour-and-a-half.

SETTING UP THE ROOM

The manner in which you choose to arrange the tables and chairs in your meeting room can affect your membership's willingness to participate in a discussion. When people are arranged in a circle or a semi-circle, they can look at and talk with one another more easily. This type of arrangement not only makes it easier

for your members to participate, but also seems less formal and more comfortable.

CONDUCTING THE MEETING

- Start the meeting on time. Punctuality lets your membership know that the agenda will be followed and that their time is respected.
- Introduce the officers. Even if there are only one or two new people at the meeting, introductions of the officers and others is appropriate.
- Stick to the agenda. Before the meeting begins, review the agenda with your membership so that they will know what is going to be discussed. Once the meeting has started, focus on one topic at a time. Don't allow members to jump ahead or to talk about an item that has already been decided. Do not move on to a new topic until there is some type of resolution or agreement on what to do about the current topic.
- Keep the meeting moving. An important talent that you will need to

develop is knowing when and how to move an agenda along. Your members should only be allowed to talk long enough to air their objections and ideas. Allowing a discussion to continue on indefinitely (particularly when members begin repeating themselves or making speeches) can result in a meeting that seems endless. After all the points appear to have been made, it is appropriate (and desirable) for the chairperson to summarize the discussion and call for some type of action.

ENDING THE MEETING

An important part of any meeting is attempting to end it on time. If your agenda has not been completed by the time your meeting is supposed to end, ask your members if they want to add a specific amount of time to the meeting (i.e., fifteen to thirty minutes) or if they would prefer the items be held over until the next meeting. At the conclusion of the meeting, review each of the decisions reached and assignments made during the course of the meeting.

CONFLICT IN MEETINGS

The term "groupthink" is used to describe the process by which everyone goes along with a bad decision. "Groupthink" may occur in your local because your members are afraid that if they point out any flaws in a plan, they may not be thought of as a team player. The healthiest locals are those in which "groupthink" is not encouraged.

Disagreement should be allowed in the planning stages of an idea so that everyone feels that their point of view has been heard and they have been a part of the decision-making process. However, once a decision is reached, your members should put their disagreements behind them and work together as a team.

COSTS AND BENEFITS

Many of your members may believe that conflicts and disagreements will have a negative effect on the overall functioning of a meeting. However, depending on how it is handled, who's creating it, and how your members feel about each other, conflicts can be either beneficial or costly to the functioning of your local. If a

conflict is continuous in nature it can be destructive, as well as dangerous to the health of your local. However, if your members feel they cannot express disagreement, they may decide to stop participating in the meetings. In addition, if there does not exist the kind of open atmosphere in which disagreement is allowed, it may go underground, bad feelings may fester, and political factions could develop. And, if no disagreement is ever expressed, it is possible that some bad decisions will be made by your local.

Some of the costs of conflict includes stress and the creation of political divisions. Too much time can also be spent resolving a conflict, not allowing you to accomplish the goals of your local. Some of the benefits of conflict include the avoidance of "groupthink" and closer unity among your members after the conflicts have been aired. Conflict also allows you to obtain information about where problems exist and members feel they can express themselves more freely.

Conflicts can occur for a variety of different reasons. Most often, conflicts

occur because people have different ideas and want different things. However conflict can also arise because different members have different values and status positions, or simply because some people crave attention. For whatever reason conflict exists in your membership, it is important that you recognize it and use it to your local's best advantage.

RESOLVING CONFLICTS

The primary rule for resolving conflicts is to remove personality from the debate. Always insist on an atmosphere of mutual respect. Have your members talk about the arguments for and against each other's position and don't allow them to attack each other personally. Personal comments and put-downs only add to the tension that comes with conflict.

"I think there are some problems with that idea ..." is a criticism that is a lot easier to take than "That's

a stupid idea ...", which seems to imply that the person putting the idea forward is stupid. Once a person feels he has been attacked personally, he will continue to fight simply to save face.

You should also focus on the points of agreement between the opponents (i.e., both sides want to see the local succeed) and build on these so that the individuals disagreeing can see that they have something in common. In other words, look for common ground.

Commonalities can be found by asking people to describe their expectations, fears, concerns, perceptions, and goals. If it can be established that an opponent's goals are the same — although there may be disagreement on how to achieve them — a complete break can be prevented.

Your members also need to know that they can express their opinions

without fear of personal attack. They need to believe that if they are being verbally attacked, the person who is leading the meeting will step in and cut the behavior off. It is the responsibility of the local union president to control the meeting by keeping the discussion focussed on issues and making sure no personal fights are given the chance to develop. To help resolve conflicts during a meeting, it is important that an atmosphere of "safety" is established.



There are two parts to the job of being an effective local union officer. The first involves the day-to-day tasks that come with the position, such as overseeing the grievance procedure, negotiating contracts, planning membership meetings, and doing general administrative work, and the second includes those tasks that are done to maintain and strengthen your local.

To be an effective leader of your local and to complete the tasks that come with the position of local union officer, you must develop your own personal style of leadership. In general, there exists two types of leadership styles — directive and participative. If you are an officer that utilizes a directive leadership style you are a person who controls everything and makes all decisions. If you are a participative leader you are an individual who listens to his membership and follows their wishes by delegating your power to committees.

There are advantages and disadvantages to utilizing either a directive style of leadership or a participative leadership style. For example:

DIRECTIVE LEADERSHIP

DESCRIPTION:

- You make all the decisions, set the agenda, and run the local.

BENEFITS:

- Decisions can be made quickly.
- If you are the most competent member of your local, then this type of leadership style may be the most efficient way to run your local.
- You have the ability to put into place ideas that may not be popular, but are in the best interests of your local.

COSTS:

- Your members may not feel like part of your local.
- There may be a limited understanding of and support for your goals.
- Political factions may develop.
- Your members may become apathetic because they have no roles.

PARTICIPATIVE LEADERSHIP

DESCRIPTION:

- Your members play an active role in running your local by assisting in the decision making process.

BENEFITS:

- Your members feel responsible for the success of plans they participated in developing.
- Your members understand what your local does and how it works because they are part of it.
- Your members are more interested in projects over which they have some control.

COSTS:

- The democratic process can be very slow.
- Decisions made may not be the best or most efficient.
- The goals of your local are limited by your members' expertise, imagination, and skills.

There exists no single correct style for every local union officer and for every type of situation. Some officers become “directive” leaders simply by default because no other members want the responsibility of a more active role in their local. A participative style of leadership on your part will generally mean an increase in the involvement of your members. However, it can be time-consuming and requires both patience and work. To be an effective leader will require you to be able to determine what type of situation requires what type of leadership style and then be able to utilize it in the most efficient manner. As with the majority of local union officers in the IAFF, your leadership style will probably fall between these two extremes.

In every type of organization, the ability to effectively plan is a prerequisite for success. If your local does not have an overall agenda or does not obtain a clear idea of what its goals are and how to achieve them, it will spend a majority of its time simply reacting to situations.

Planning allows your local to set achievable, short-term goals that matter to its members. By setting these goals, the membership gets a sense of activity and forward motion, as well as a sense of strength and control.

Outlined below are six steps your local should utilize when planning its format:

Step 1: Develop Your Long Term Objectives

All local union officers and the executive board should begin by drawing up a list of five to six long-term objectives for your local. These objectives might concern issues such as improving fire fighters' images in your community, signing up 100% of potential members, or settling grievances at the first step. Simply picture your local a few years from now. How

would you like it to be different than it is today?

Step 2: Translate Your Long-Term Objectives into Short-Term Goals

Make sure that your short-term goals are specific, measurable, and achievable and will lead your local towards accomplishing its long-term objectives. For example:

- If your long-term objective is to improve your local's image, your goal might be to receive positive news coverage for two activities within the next three months.
- If your long-term objective is to increase membership participation, your goal might be to recruit ten more people to serve on your local's committees.
- If your long-term objective is to sign-up more members, your goal might be to sign-up ten new members within the next month.

Step 3: Set Your Priorities

After your long-term objectives have been developed and translated into short-term goals, you have to choose which

issue to work on first. Some criteria you will want to consider when making your choice includes:

- What your local's resources are in terms of money, people, and time. Are any of your plans particularly difficult to accomplish given your current resources?
- What goal is most important to your local. Which of your goals are the most urgent? Which goals will do the most good?
- What goal is most likely to succeed? Which goal seems to be the easiest to achieve, especially if you are just starting out in the process? (If possible, you may want to begin with a "sure" victory.)

Step 4: Develop a Plan of Action

Your local's plan of action is your road map for achieving each of your goals. This is the key step between planning and doing. The components of your action plan should include:

- **What?** List all the various tasks that need to be accomplished, step-by-step.
- **When?** Develop a timetable with specific dates for achieving each task. You may want to consider developing a planning calendar to keep track of the dates.
- **Who?** Assign individuals to be responsible for getting each particular task done on time and keep a record of these assignments for accountability.
- **Where?** Determine what the most advantageous location is for meetings or events.
- **How?** Investigate other available resources that might be helpful (i.e., coalitions, community activists, family members, etc.).

Step 5: Meet Regularly to Review Your Progress

For accountability purposes, you will want to regularly schedule meetings to determine if everyone is doing what they were assigned to do. These meetings will also allow you to assist those members who may need help.

Step 6: Evaluate Your Successes and Failures and Set New Goals

At the conclusion of your allotted time period, everyone involved should meet to evaluate the success of the plan. If the plan wasn't successful, what was the problem? Was the goal too ambitious or maybe the plan wasn't detailed enough. This is also the time to examine some of your other goals and determine which one of them should be attempted next.

If the members of your local understand how what they are doing fits into the goals of their local, if they have timetables so that they are not being asked for an indefinite commitment, and if your local gets results, then they will be more willing to be recruited to participate in the activities of your local union.

Be sure to keep each of the following factors in mind when attempting to recruit volunteers from your membership:

- **Clear and Relevant Goals.** Your volunteers must believe in the purpose of your local and your local must clearly and frequently communicate this purpose to its volunteers.
- **Successes.** Your volunteers must feel that they are contributing their time and talent to an organization that is making a difference.
- **Effective Management.** Your volunteers must be assured that their time and resources are being used effectively and efficiently. Your local must have clearly defined roles, responsibilities, and communication channels.

■ **Individual Empowerment.** Many people work in organizations that are so large that their individual voices do not seem to make a difference. Members of your local may want to volunteer so that they can help in the decision-making process.

■ **Accountability.** Expectations for each of your volunteers should be clearly communicated and each volunteer must be held accountable for his actions. Appropriate recognition should also be given when expectations are met.

■ **Training.** Your volunteers cannot work effectively without the proper tools and training.

MOTIVATIONAL FACTORS

People are motivated to volunteer by a variety of different factors. The reason one individual volunteers his time may not necessarily be the same reason why another individual does the same. While you will not be able to accommodate every person, it is important to the success of your recruitment activities that you are aware of some of

the different factors that motivate individuals to volunteer. For example:

- **Achievement** - Doing something they can take pride in.
- **Acquisition** - Attaining money or other tangible rewards.
- **Affiliation** - Being with other people and feeling accepted by a group.
- **Autonomy** - Supervising themselves and controlling their own work.
- **Creativity** - Using talents in new and useful ways.
- **Mobility** - Progressing up an organizational ladder.
- **Power** - Influencing people and events, and controlling resources.
- **Recognition** - Receiving praise or attention from other persons.
- **Safety** - Functioning within a stable, predictable environment.
- **Service** - Desiring to help others.

Once you have obtained your volunteers, it is important that they stay sufficiently motivated so that they will continue volunteering. Three factors you need to consider when attempting to keep your volunteers motivated over a long period of time

include: inclusion, control, and appreciation.

To foster a sense of inclusion, make sure that all of your volunteers are aware of what is going on. Ask for their input in the form of ideas and opinions, and have regularly scheduled meetings of the entire work team.

The ability to control their pace of work and to have some influence in the decision-making process motivates individuals to continue volunteering as well. Be sure to allow your volunteers some control over their work by giving them a task and letting them work out how they want it handled. Supervise through helpful attention, but don't look over people's shoulders all the time, insisting they accomplish their tasks in a particular way.

Your volunteers need to feel that they are appreciated as well. The best way to do this is through some token of thanks. Ways in which this might be accomplished include:

- personal thank-you notes,
- public recognition at meetings,
- mentions and photos in your local's newsletter,

- framed certificates of appreciation,
- plaques, and
- opportunities to attend training programs and conferences (i.e., IAFF Educational Seminars).

RECRUITING TIPS

When attempting to recruit members to volunteer, some tips you will want to observe include:

- Asking the member in person. Talking face to face is a far more effective form of communication than any other.
- Asking the member to accomplish a task that has a definite beginning and end. Unless you are positive that the member has the time, don't require too much from him. If he knows the job is small and won't require a lot of his effort, the member is more likely to consider volunteering.
- Offering the member a variety of jobs from which to choose. Consider writing up job descriptions for each of the tasks that need to be accomplished and allowing your members to choose what seems most interesting to them.
- Asking the member to volunteer for those tasks that you know he can do well. People are more willing to work on those things that they know they will be successful at accomplishing.
- Telling the member how his job fits in with other jobs. Your members need to understand how the whole project is going to work and how their part will contribute.
- Encouraging the member to ask questions. If your member does not understand something, he needs to feel that he can approach you for assistance and support.
- Explaining how the project will help make your local stronger. Be enthusiastic about the importance of the work. People want to know that they can make a difference.

One final common-sense recommendation for guaranteeing that your members keep volunteering is to have fun over the course of accomplishing your local's projects. The opportunity for fun is a strong motivator and reward for many people.

Even if the job is serious, there is no reason not to have a good time doing it.

Shift meetings should be avoided by your local if any other possible method can be utilized to obtain the same results. This is because of the difficulty in this type of meeting to reach an agreement between the two meetings on a final action. However, if a shift meeting is determined to be necessary, it is essential that the following procedures are utilized:

1. Responsible union leadership should be properly concerned with providing the maximum practical protection for their members' rights during meetings. A shift-meeting with three or more meetings offers many opportunities for the curtailment of these rights. As such, shift-meetings should be limited to two meetings.
2. Both meetings are considered as one meeting as far as total votes are concerned and as far as the final results that are to be determined.
3. Because it is advantageous to your local to complete an action as soon as possible, both shift meetings should be held within twenty-four (24) hours of one another.

4. In order to establish the results of an action taken in shift meetings, the total votes cast for and against a motion in both shift meetings should be added together.

Example 1:	For	Against
Shift Meeting A	40	20
Shift Meeting B	30	40
Total	70	60

Example 1: Assume Shift Meeting A votes for a motion and Shift Meeting B votes against a motion in the following way: Since a majority is required to adopt any main motion, then 66 out of the 130 votes are needed for this motion to pass. A total of 70 members are for the motion while 60 members are against. Therefore this motion is adopted.

5. The total number of votes in both shift meetings determines whether an amendment is adopted or not.

Example 2: Assume Shift Meeting A adopts a motion. Shift Meeting B amends it and sends it back to Shift Meeting A and Shift Meeting A defeats the amendment. The total number of votes cast at each meeting are as follows:

Example 2:	For	Against
Shift Meeting B	66	64
Shift Meeting A	50	55
Total	116	119

Since a majority is required to adopt any amendment, then 118 out of the 235 votes are needed for this amendment to pass. A total of 116 members are for the amendment while 119 are against. Therefore, this amendment is not adopted.

6. An announcement of a vote can only be made after final action is taken by the last shift meeting to vote. It is essential to your members' rights that no announcement on a vote be made until the final vote is taken.

7. Any action taken in the first shift meeting must be referred to the second shift meeting except when a final vote is not taken.

Example: Assume Shift Meeting A makes a motion during its meeting and in the same meeting, the motion is indefinitely postponed. The motion is killed and a final vote is not taken. Therefore, the motion does not go to Shift Meeting B.

8. If an amendment is offered and defeated in the first shift meeting, and the same amendment is offered at the second shift meeting and adopted, then it is necessary for the motion as amended to be returned to the first shift meeting for a final vote.

9. If a motion is made and adopted at the first shift meeting, the second shift meeting does not

have the authority to table it. Some type of action must be made on the motion by the members at the second shift meeting.

10. If a motion is defeated in the first shift meeting, it will not go to the second shift meeting. However, the second shift meeting can originate another motion that is the same as the motion defeated in the first meeting. (As a practical matter, this should only be done when the proponents of a motion have reason to believe that there has been a change of viewpoint towards the motion, or that the combination of votes in favor for the two meetings would be enough to adopt the motion).

11. If the first shift meeting adopts a motion and the second shift meeting proposes amendments to the motion and adopts them, then the motion as amended must be returned to the first shift meeting for a vote.

12. The combined votes of both meetings determine whether a motion goes to a committee or not.

Example 3: Assume motion "Z" is passed by Shift Meeting A and Shift Meeting B refers it to a committee. The motion is referred back to Shift Meeting A for a final vote on referring the motion to a committee. The total number of votes cast at each meeting are as follows:

Example 3:	For	Against
Shift Meeting B (motion "Z" to committee)	60	40
Shift Meeting A (motion "Z" to committee)	50	10
Total	110	50

Since a majority is required to determine whether a motion goes to a committee or not, then 81 out of 160 votes are needed for motion "Z" to be referred to committee. A total of 110 members are for the referral while 50 are against. Therefore, motion "Z" is referred to a committee.

13. If the first meeting adopts a motion and the second meeting votes to "indefinitely postpone" the motion, the motion is killed and goes no further.

14. If the first shift meeting votes to postpone a motion until a specific date, the motion and the postponement date should both be considered by the second meeting. The combined votes of both meetings on the postponement determine whether the postpone-

ment becomes effective or not.

15. If the first shift meeting adopts a motion and the second shift meeting votes to postpone it until a specific date, the postponement date has to be considered by the first shift meeting.

16. The minutes of the first shift meeting are to be read only at the next session of the first meeting and not at the second meeting. Minutes require action for adoption by the meeting where they originated and no action by the other meeting.

17. With the exception of elections, written ballots should not be used in shift meetings.

18. To prevent confusion because of members changing shifts, roll-call votes should always be taken at each of the two-shift meetings.

This is to prevent members, who change shifts, from voting twice on a motion.

Roll-call lists should be prepared in advance by your local union secretary. The names of each member in good standing should be listed in alphabetical order on the left hand-side of each page. Located to the right, should be three columns headed "Yes", "No", and "Present."

Your local union secretary is responsible for calling each member's name. The member responds by saying "Yes", "No", or "Present." This response is then recorded in the appropriate column.

Your members have the right to change their votes from "Yes" to "No", from "No" to "Yes", from "Present" to "Yes", or from "Present"

to "No" at any time before the result of the vote is announced. Members cannot change their vote from "Yes" or "No" to "Present." After the vote has been announced, no changes in votes can be made.

As you plan and conduct your two-shift meetings, keep in mind the basic principles which apply to the conduct of all meetings. Most importantly, remember that the minority has the right to express their views and offer any proper motion. However, once a decision has been made, it is the duty of all members to abide by the result.



Building the Local Union, developed by the AFL-CIO Department of Education.

Local Union Administration, developed by the International Association of Fire Fighters.

Local Union Financial Responsibilities and Management, developed by the International Association of Fire Fighters.

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