



Auxiliary to the APWU

HANDBOOK OF INFORMATION

Assisting the Union

**Human
Relations**

Legislation

**Political
Action**

**Public
Relations**



Handbook Of Information

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Human
Relations

Legislation



Political
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Relations

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The Auxiliary is a grassroots organization with a gateway to opportunity for families, friends and supporters of the American Postal Workers Union. As our parent body, the support of the American Postal Workers Union is vital to our organization. Their efforts will always be one of our priorities. The Auxiliary is ready to reinforce or give a helping hand to the APWU when needed.

The Auxiliary logo is a "STAR" representing these five areas of focus:

- * Assisting the Union
- * Legislation
- * Political Action
- * Human Relations
- * Public Relations

Your National Auxiliary Executive Board is ready to provide you with education. Guidelines are set for organizing locals, membership growth, and officer training. Workshops are available addressing the areas of human relations, legislation and lobbying, labor education, safety and communications.

The National Auxiliary sponsors a continuing education scholarship named in honor of Sally and Patrick Nilan. Mr. Nilan served for many years as Director of the APWU Legislative Department. Applicants must be an active member of the APWU National Auxiliary

Other Auxiliary sponsored human relations projects include the "Two Can Do" food drives for shelters and food banks. Community service is an integral part of our organization. Locals and states incorporate a variety of programs to impress upon their communities the compassion of the APWU and Auxiliary.

This handbook has been compiled in an effort to motivate -- educate -- and inspire involvement in the Auxiliary to the American Postal Workers Union. We hope this "Handbook of Information" will empower your Auxiliary to grow in membership and activity, while providing our members the opportunity to collaborate with their community, enjoy the friendships of our members, and to grow both personally and professionally.

Historical Background

The history of the Auxiliary parallels the history of the postal unions. The Auxiliary, as we know it today, came into being through a series of mergers of specialized craft unions. As the unions merged, their respective Auxiliaries also merged. The last merger occurred on March 3, 1971 when five postal unions merged to form the American Postal Workers Union, AFL-CIO. The five merging unions were: the United Federation of Postal Clerks, the National Association of Post Office and General Services Maintenance Employees, the National Federation of Post Office Motor Vehicle Employees, the National Association of Special Delivery Messengers, and the National Postal Union. Their Auxiliary merger was completed by Jan. 1, 1972.

Most of the forerunner Auxiliaries which make up the Auxiliary to the American Postal Workers Union, AFL-CIO were organized and active for many, many years prior to the merger. The Auxiliary members followed many of the same programs and carried out many of the same projects that we continue today.

The oldest Auxiliary of record, the Women's Auxiliary to the National Federation of Post Office Clerks (NFPOC) was organized in Memphis, Tennessee on Labor Day of 1917. Relatives of post office clerks organized three local Auxiliaries (Chicago, Memphis and San Francisco) to form the national organization. With almost unbearable working conditions existing at the time, and with an ever increasing cost of living, the object of the Auxiliary to the NFPOC was to bring together women interested in the efforts of the NFPOC to secure better working conditions, to extend a knowledge of desired remedial legislation, to render effective aid in securing passage of remedial legislation, and to support workers generally in their efforts to secure a higher standard of living. This organization was later merged into The United Federation of Postal Clerks Auxiliary.

Records for some of the forerunner Auxiliaries are incomplete. For instance, we can't ascertain from the records the original date of organization of some of the Auxiliaries. Because there is a keen interest on the part of our present members for the roots of our organization, a booklet detailing the history of the forerunner Auxiliaries has been compiled from the existing records. A copy of this history can be obtained from the National Auxiliary Secretary.

At the time of the merger in 1972 the total membership stood at 5,598. There were 424 state and local Auxiliaries with 5,175 members and 423 MALs. The first convention after the merger was held in 1972 in New Orleans. Mrs. Victor (Maggie) Reimann was elected as the first President. Since the merger, the Auxiliary has become increasingly more inclusive and more democratic. For instance, more men participate on all levels of the Auxiliary. The Auxiliary has adopted progressive programs such as Labor History Education, Two-Can-Do, and the Auxiliary Nilan Continuing Ed Scholarship. The Auxiliary logo has been updated. The Auxiliary underwent redistricting and the national board shrank from 26 to 13 members. We currently have 11 members on the National Board.

We have been challenged many times in all these years and there have been many changes. We have built on the wisdom and experiences of those who have gone before us. Our rich history is a testament to our abilities and determination.



YOUR AUXILIARY ORGANIZATION AT A GLANCE

NATIONAL OFFICERS

General Officers

President Secretary Treasurer Legislative Aide/Editor
 Guam, Puerto Rico, Pacific Islands, Virgin Islands

District Coordinators

District 1	District 2	District 3	District 4	District 5	District 6	District 7
Alaska	Arizona	Iowa	Arkansas	Illinois	Alabama	Connecticut
Idaho	California	Kansas	Louisiana	Indiana	Florida	Delaware
Montana	Colorado	Minnesota	Mississippi	Kentucky	Georgia	Maine
Oregon	Hawaii	Missouri	Oklahoma	Michigan	North Carolina	Maryland/DC
Washington	Nevada	Nebraska	Texas	Ohio	South Carolina	Massachusetts
Wyoming	New Mexico	North Dakota		West Virginia	Tennessee	New Hampshire
	Utah	South Dakota		Wisconsin	Virginia	New Jersey
						New York
						Pennsylvania
						Rhode Island
						Vermont

STATE ORGANIZATIONS -- defined as any one of the following examples:

- A minimum of three (3) Auxiliaries OR two (2) Auxiliaries and one (1) Member at Large
- One (1) auxiliary and five (5) Members-at-Large
- Four (4) LWOL chapters
- Three (3) LWOL chapters and one (1) Local Auxiliary
- Two (2) LWOL chapters and one (1) Local Auxiliary and one (1) Member-at-Large
- Three (3) LWOL CHAPTERS and two (2) Members-at-Large
- One (1) auxiliary, one (1) LWOL chapter and three (3) Members -at-Large
- Two (2) LWOL chapters and four (4) Members-at-Large
- Twelve (12) LOWL members from a minimum of four (4) Locals
- Twelve (12) Members-at-Large

OFFICERS - Usually 3 to 4 from the following -- *President, Vice President, Secretary, Treasurer (or Sec/Treas), Legislative Aide, Editor*

LOCAL ORGANIZATIONS

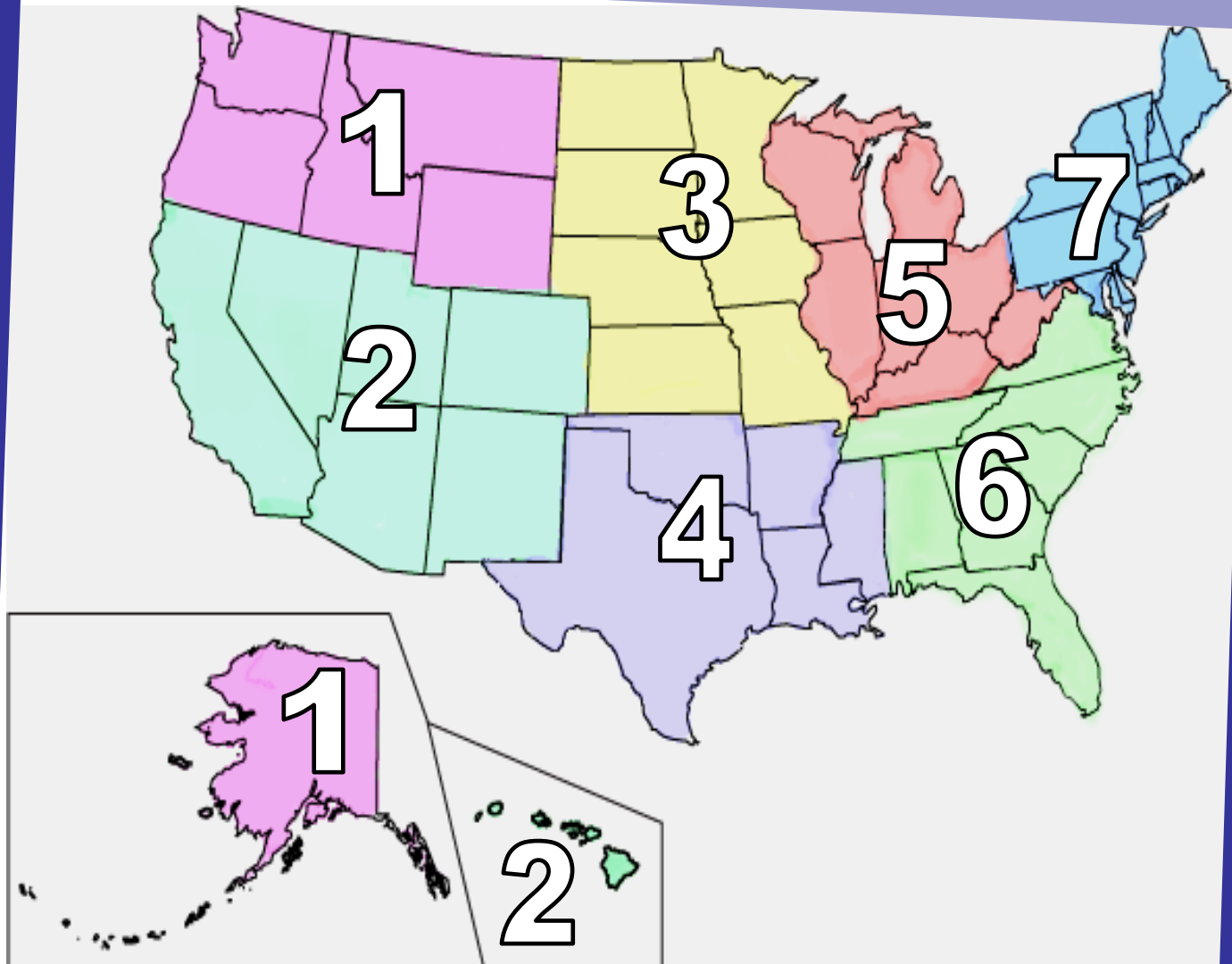
A Minimum of 4 Members with elected officers, a local Constitution, National Auxiliary Charter and an EIN (Employer Identification Number).

OFFICERS - Usually 3 to 5 from the following -- *President, Vice President, Secretary, Treasurer (or Sec/Treas), Legislative Aide, Editor, Chaplain*

LOCAL WITHOUT LEADER(S) (LWOL)

Four or more members without any one of the following: a Constitution, Charter, Officers or EIN (Employer Identification Number).

MEMBER-AT-LARGE (MAL)



District 1 - Alaska, Idaho, Montana, Oregon, Washington & Wyoming

District 2 - Arizona, California, Colorado, Hawaii, New Mexico, Nevada, Pacific Islands, & Utah

District 3 - Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota & South Dakota

District 4 - Arkansas, Louisiana, Mississippi, Oklahoma & Texas

District 5 - Illinois, Indiana, Kentucky, Michigan, Ohio, West Virginia & Wisconsin

District 6 - Alabama, Florida, Georgia, North Carolina, South Carolina, Tennessee, & Virginia

**District 7 - Connecticut, Delaware, Maine, Maryland/DC, Massachusetts, New York
New Hampshire, New Jersey, Pennsylvania, Rhode Island, & Vermont**

The General Officers-- Puerto Rico, Virgin Islands, Pacific Islands

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Organizing and Recruiting

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Organizing And Recruiting Members

Becoming A Member

The first step to forming an Auxiliary is to become a member. The requirements for membership are listed in the National Auxiliary Constitution, Article III, Section 1a. Simply stated any person sponsored by an APWU member, a deceased APWU member, or a retiree from the APWU is eligible to be a member in the Auxiliary. In addition, any retired APWU member may be a member of the Auxiliary. Membership is continuous as long as dues are paid and the APWU member doesn't enter a supervisory position. You may join an Auxiliary that meets near you, hold membership in the same local that your sponsoring APWU member belongs to, or you may simply become a member-at-large (MAL). To join you need only pay dues and furnish the Auxiliary with your name and address. It is helpful for officers to know your phone number and the name of your sponsoring APWU member as well. Dues may be paid directly to the National Auxiliary Treasurer, or to a State or Local Auxiliary Treasurer. Sometimes dues are also collected by other National, State or Local Officers. Your dues payment will include national dues, state dues, and local dues if any. Any Auxiliary officer can explain the current dues structure.



Types of Membership

The National Auxiliary is composed of large and small Auxiliaries and individual members. The types of membership are listed in the National Auxiliary Constitution Articles III and V. Membership possibilities include:

100% AUXILIARIES

Each Auxiliary that has at least one Auxiliary member per union member shall be considered a 100% Auxiliary. States may be 100% Auxiliaries by having at least one Auxiliary member per state union member.

STATE AUXILIARIES

A minimum of three Auxiliaries; or two Auxiliaries and one member-at-large or one Auxiliary and five members-at-large or twelve members-at-large or more Auxiliaries or members-at-large than stated as the preceding minimum may form a State Auxiliary.

LOCAL AUXILIARIES

Organized Auxiliaries

Organized Local Auxiliaries must have at least four members in good standing. A charter is issued after it is requested from the National Secretary. An officer listing, EIN and membership listing must be included with a request to be chartered.

UNORGANIZED AUXILIARIES (LOCALS WITHOUT LEADERS)

This group of members is considered a local for voting purposes. They do not have officers or a current charter. The Constitution and Bylaws directs their representation at National Conventions.

Types of Membership, Continued

MEMBER-AT-LARGE (MAL)

Any person eligible to hold membership in this Auxiliary may become a member-at-large (MAL), and shall have the right to vote and hold office as an active member, provided that no such membership be granted from offices where a local Auxiliary exists and provided further that not more than three MAL memberships be granted in any local.

LIFETIME MEMBERSHIP

The National Executive board, with a two-thirds vote, shall have the power to present life membership with all privileges to those persons who have dedicated their life to the Auxiliary. Local and State organizations shall have the privilege of submitting name (s) with supporting resumes to the National Executive Board for consideration.

HONORARY MEMBERSHIP

Local units of this organization have the privilege of extending honorary membership at their discretion, provided such membership is not extended to those who are eligible to full membership. Honorary members shall pay no dues, hold no office and have no vote.

EXTENUATING CIRCUMSTANCES

The National Auxiliary Constitution permits retention of membership if the sponsoring APWU member retires or dies as long as the sponsoring member was in good standing in the APWU at the time of retirement or death, and as long as the Auxiliary member otherwise fulfills regular membership obligations.

APWU Retirees

The Auxiliary has an interest in APWU retirees because we are an organization of family members. As such we are concerned about issues that affect postal families. The APWU Auxiliary has been an active lobbying organization for postal issues, and our members are kept up to date on legislation affecting retirees and their benefits. We also work alongside the union, giving hundreds of volunteer hours to help the union accomplish goals on the local, state and national levels. Retirees can utilize their skills and knowledge and continue to assist union brothers and sisters with projects they are interested in. Auxiliary dues are affordable and easily fit into the retirees' budget. Additionally, retirees who become active Auxiliary members continue to have contact with friends made while working for the postal service.



Organizing An Auxiliary

Whether you are an individual Auxiliary MAL or a Local Union hoping to organize an Auxiliary, there are certain steps you must follow to be recognized as an official Auxiliary and receive a charter. The steps are: enlist APWU support, recruit members, elect officers (see Chapter 3), request and receive an EIN from the IRS, pay per capita tax (dues), and draft a constitution and by-laws and policy statement. Instructions follow.



Recruiting Members

Recruiting members must be a never ending project. If recruiting begins to lag, the organization begins to die. Many methods can be used for recruiting, contests can be used as an incentive for members to invite prospects to join, and resources such as the union's newspaper can be used to publicize recruiting campaigns.

Officers and current members should be periodically trained for recruiting members. This ensures that everyone is confident of their abilities so they can present the Auxiliary in the most positive light. This training should include a discussion of who is eligible to join, who currently joins, and why they have joined. Following training, recruiters should be able to explain the Auxiliary's purpose and mission and the benefits of membership to new members. Everyone should have a clear understanding of the dues structure and how and to whom dues are paid.

Planned recruitment campaigns are normally more effective. Recruiting should not fall on one member or officer. Everyone involved in the campaign should understand their role and importance. The prospects should be clearly identified. One common thread is the relationship between the APWU and the Auxiliary. Match the method to the target group. Ensure that the campaign follows the Auxiliary constitution and rules of your organization. A follow up procedure should be part of all campaigns.

Methods

- ◆ Telephone in a friendly manner to set an appointment to visit with the prospective member.
- ◆ Have an acquaintance approach a prospect one-on-one.
- ◆ Handwritten notes are more effective than typed notes, although both are useful.
- ◆ Take every opportunity, including the chance meeting at the grocery store, to invite a prospect to join. Maximize any opportunity that arises when a prospect indicates an interest in something the Auxiliary is doing.
- ◆ Invite prospects to a meeting.
- ◆ Involve prospects in a project.
- ◆ Always provide immediate sign-up opportunities after any event you sponsor.
- ◆ Use attractive literature with all points covered in a brief statement.
- ◆ Review reasons people join organizations. Remember people work to "*help people*" not organizations.
- ◆ Review rationales for the Auxiliary so you can point them out to prospects.
- ◆ Sponsor a "Bring a Friend" social event.
- ◆ Tell why you are personally committed to the organization.
- ◆ Use personal follow-up by telephoning about a week after the first encounter.
- ◆ Make visitors feel wanted, welcome and needed!
- ◆ Don't forget to ask them to become a member.

Rationales For An Auxiliary !!

- Community outreach
- Community input
- Gain additional human resources
- Gain additional expertise
- Access corporate and foundation contacts
- Act as a conduit to other groups
- Give the USPS a personal touch
- Cost savings
- Demonstrate community support by postal families
- Assist in fund raising
- Provide ability to react to short-term crises
- Supplement resources and experiences
- Allow quick reaction to changing community conditions
- Assist member in self-help efforts
- Encourage family involvement
- Teach children about the union

Why People Join An Organization

- Help others
- Protect your way of life
- Meet people with similar interests
- Gain work experience
- Improve the community
- Utilize special skills
- Get out of the house
- Learn new skills
- Change the status quo
- Stay active and involved
- Influence others
- Use natural gifts and talents
- Help a friend
- Empower others
- Be a role model for your children
- Give back what you have been given
- Show you care
- Fulfill a tradition

- Show you care
- Meet new people
- Fight for a cause
- Accept responsibility
- Personal growth and development
- Personal achievement
- Build self-esteem through accomplishments
- Be aware of your service to others
- Preserve the past
- Put faith into action
- Be an individual rather than a number
- Gain academic credit
- Build self-confidence
- Do satisfying work
- Meet challenges
- Be a winner
- Social time with friends and family
- Feel wanted

Why do you join an organization?

You don't buy membership in an organization, you buy the cooperation of people with whom you can join hands to do the things you cannot do alone.

(Taken from Jefferson County, KY RTA Newsletter).

Union Encouragement And Guidance

It is in the union's best interest to help organize and encourage the state and local Auxiliary. Wherever an APWU organization exists, an Auxiliary could help with support functions that busy union members and officers have precious little time for. Some Auxiliary members volunteer time and services in union offices. Auxiliary members may assist with editing and production of union newspapers. Auxiliary members frequently help with union human relations projects, fund raising for COPA, and with social functions and meetings. These are just a few of the things Auxiliary members can do, which is why a good APWU organization is even better when it has an active, enthusiastic Auxiliary! The National APWU recognizes this fact and encourages and supports the Auxiliary in many ways.

The Auxiliary benefits individual APWU members as well. Family members learn about postal work and the type of stress postal workers must contend with. Family members can meet with a sympathetic group of people who can offer suggestions on how to cope with early morning or late night work schedules. Most importantly, family members are kept informed about issues and legislation that could adversely affect postal families. The Auxiliary allows the entire family to work together on projects of mutual interest.

Auxiliary members do not participate in union politics unless an election involves an immediate family member. Auxiliary members do not take controversial stands on issues that aren't sanctioned by the APWU. Although the Auxiliary normally functions independently from the union, electing its own officers and holding separate meetings, Auxiliary members look for direction from the APWU to know what services the local organization needs.

The Auxiliary must depend on the APWU Locals and State organizations for assistance in organizing Auxiliaries and recruiting members. After all, the only thing most potential Auxiliary members have in common is a family member who is also a member of the APWU. Spouses, mothers, and children of APWU members may be completely unaware that the Auxiliary exists unless APWU members inform their families and encourage their family members to become involved.

How can the APWU do this? One good way is to have an APWU sponsored family picnic or evening out where invited Auxiliary Officers or APWU Officers can present information about the Auxiliary. Another way is to promote the Auxiliary in the union's newspaper. The union can share its mailing list with Auxiliary officers or send out letters to all APWU families to inform them about the Auxiliary. Some organizations have even paid one year's dues for any family member willing to try membership in the Auxiliary. These are just a few of the possibilities for promoting and encouraging Auxiliary membership.

Guiding and encouraging Auxiliary officers and members pays big dividends to APWU organizations. Certainly every APWU organization can reap big rewards with only a small investment of time, energy, and funds.

❖ *The Auxiliary Presentation* ❖

You've been invited to come to a union meeting or picnic and speak to the union members and their families about the Auxiliary. Wondering what to say or where to start? It's a good idea to prepare an outline of the topics you wish to cover and bring a supply of handouts and membership envelopes. The Auxiliary has flyers, brochures and other materials which you can order from the National Auxiliary Secretary. In addition, you may wish to read through suggestions for public speaking found in Chapter 5 of this Handbook. In fact, all of the information you need to discuss the Auxiliary can be found in this Handbook.

A Basic Presentation Outline--Answer 4 Questions

I. What Is the Auxiliary?

- A. Give an overall summary of what the Auxiliary is. (See Handbook, Introduction by President, Chapter 1)
- B. Summarize the history of the Auxiliary (Handbook, Chapter 1)
- C. Explain who can belong. (Handbook Chapter 3)
- D. Clearly explain the differences in APWU and Auxiliary roles
- E. Erase stereotypical images of the Auxiliary.

II. Why does a union want an Auxiliary?

- A. Use information from Union Encouragement and Mentoring (Handbook Chapter 2) to explain how the Auxiliary enhances the local APWU.
- B. Explain what the Auxiliary does (Handbook Chapter 5)
- C. Give a few specific examples of Auxiliary projects.
- D. Indicate support from the National APWU.
- E. Give examples of other locals who have benefited from having an Auxiliary.

III. How do you get an Auxiliary?

- A. Use information from Handbook Chapter 2 to cover recruiting members.
- B. Use information from Union Encouragement and Mentoring, Handbook Chapter 2 to explain the Union's role in recruiting members.
- C. Use information from Handbook Chapter 3 to explain types of membership.
- D. Use information from Handbook Chapter 2 to explain how to organize an Auxiliary.

IV. After you've got an Auxiliary, how do you keep it going?

- A. Talk about on-going recruiting.
- B. Talk about the importance of encouraging everyone's participation and a fair hearing of everyone's opinions. (Handbook Chapter 4)
- C. Talk about recognizing and rewarding members. (Handbook Chapter 4)

Remember to be positive. Smile!

Handout brochures and/or flyers.

Speak with potential members individually after the presentation and ask them to join.

Payment of Per Capita \$\$

Per capita is commonly referred to as dues. National per capita is \$5.00 per member per year. Additional dues may be added by the state and local organization. Per capita is due in advance and may be paid annually or semi-annually. 100% Auxiliaries may pay monthly, quarterly, semi-annually or annually. Send per capita payments to the National Auxiliary Treasurer. The following information **must** be enclosed for each member:

- ◆ Name
- ◆ Address including Street, Apartment Number, City, State and Zip (with +4 if known)
- ◆ Telephone Number with area code
- ◆ Email address
- ◆ Sponsor name (APWU member)
- ◆ Local and State where sponsoring APWU member is a member
- ◆ Date joined
- ◆ Dates of membership
- ◆ Social Security Number (optional)

State Treasurers are responsible for collecting dues from all members in their respective states and forwarding the per capita to the National Auxiliary Treasurer in a timely fashion. Per capita should be grouped by local membership and member type. (Local, member-at-large, or Unorganized local). Dues notices should be sent at least 30 days in advance of the expiration of membership.

See page 2--1 of this handbook or the National Auxiliary Constitution and By-laws Article III, Section 1(a) for membership eligibility requirements. A member is due upon the expiration date. A member is delinquent after three (3) months. A member is suspended from membership after six (6) months.

Employer Identification Number (EIN)

The EIN is an identification number issued by the IRS. Each state and local organization must have their own EIN, you must have an EIN to open a bank account for the organization. Do not share numbers and do not use a Social Security Number in place of an EIN. If you are opening a new bank account and do not have an EIN, the bank will accept a copy of IRS form SS-4.

Check with the National Treasurer before you apply for an EIN to see if your organization already has an EIN on file, this is especially important if you are reorganizing a dormant Auxiliary. If you do not have an EIN you must complete IRS form SS-4. You can obtain IRS form SS-4 from the IRS office in your area. The instructions are on the reverse side of the form and some answers to commonly asked questions follow on the next page. If you have questions call the National Auxiliary Treasurer for assistance.

The current phone number for the IRS is 1-800-829-1040. IRS phone numbers may change without notice.

Routine Auxiliary Answers for Completion of SS-4

- Line 1is the name of the organization. Be sure to use the exact name as it will
.....appear on your charter.
- Line 2Skip
- Line 3This is normally the treasurer.
- Line 4a -Line 6 ..are self explanatory.
- Line 7This is either the Treasurer or President, normally the Treasurer.
- Line 81check "other nonprofit organization".
(Specify) 501(c)
The "GEN" is 1015
- Line 9Usually you will be starting a new business. If you are unsure about this
.....answer call the National Auxiliary Treasurer.
- Line 10Is the date you requested a charter or organized.
- Line 11See the instructions.
- Line 12Normally this is not applicable and should be annotated by placing N/A
.....in this block.
- Line 13Normally this is not applicable and should be annotated by placing N/A
.....in this block.
- Line 14The Objectives (Article II) in the Auxiliary Constitution are considered the
.....principal activities of the is organization.
- Line 15Answer "no".
- Line 16Answer "N/A".
- Line 17a-c.....You must answer this based upon personal experience.

- ◆ The Treasurer is normally the person who will sign and date this form.
- ◆ After this form is completed send a copy to the National Auxiliary Treasurer.
- ◆ When you receive your EIN, send a copy of that form to the National Auxiliary Treasurer and the National Auxiliary Secretary.

Drafting and Revising the **Local Constitution**



Every local and state Auxiliary should have a constitution and by-laws based on, and in agreement with, the National Auxiliary Constitution and By-laws. A constitution is a general policy statement of the membership that details the official name of the organization, the purpose or object of the organization, who can be a member, who can be an officer, how the officers are elected and how long they serve, what the officers' duties are, how the organization may be represented at conventions, what the dues are and how they are paid, what type of behavior is prohibited and how the constitution can be amended. It also generally states when and where the meetings will be held.

Example: Meetings are held on the first Monday of the month in the homes of the members, with a schedule of locations to be determined at the annual planning meeting.

The By-laws state the order of business and how the order may be changed if at all, the rules of the meetings (normally Robert's Rules of Order), quorum requirements if any, and how to amend the by-laws.

When drafting a local constitution and by-laws, the members should refer to the National Auxiliary Constitution and By-laws which governs the Auxiliary as a whole. Many things in the National Constitution apply to all levels of the Auxiliary, such as the object {found in Article II} and membership requirements {Article III, Sec. 1 (a)}. There are also some parts which will not apply on the local level. For instance, local auxiliaries don't have their own conventions but instead send representatives to conventions. There are some parts which may or may not apply on the local level. An example of something that might not apply is honorary or lifetime membership, and some duties of the officers are sure to be different on the local level.

The most expedient way to draft a constitution and by-laws is to appoint a committee to work on the project and present a draft to the full membership. The members of this committee should read the National and appropriate State Auxiliary Constitutions. All members of the organization should be informed in writing of the meeting that will consider the committee's draft of the local constitution. Members may choose to approve entire articles, or vote on each section.

The National Auxiliary recommends that you organize your local constitution and by-laws in the same manner as the National Constitution and By-laws. When reading through the National and State Constitutions you may wish to highlight all sentences that would also govern your local Auxiliary. When writing your local constitution, you can simply lift these sentences verbatim and insert them at the proper place in your local constitution. You will have to draft your own language that explains how delegates will be chosen to represent your Auxiliary at conventions, what duties you expect your local officers to perform, when and where your meetings will be, what your local dues are, etc.. In short, your local Auxiliary constitution will very likely be a simpler version of the National Auxiliary Constitution.

What if you disagree with wording in your National and/or State Constitutions? The National and State Auxiliaries are democratic organizations that depend upon your input for sound, reasonable wording for their constitutions. Your local may submit a resolution to make changes in these constitutions at the state Auxiliary convention. See Chapter 6 of this handbook for how you may write a constitutional resolution. Once your membership has voted approval of a final document, this version should be sent to the National Auxiliary President for approval. {See the Standing Rules for Affiliate Organizations at the back of the National Constitution.} The National President will review your Constitution and By-laws to be sure nothing conflicts with the National Constitution and By-laws.

The National Auxiliary Constitution and By-laws are reviewed and revised at every National Convention. Many times these revisions apply to local Auxiliaries. All local Auxiliaries should review the local constitution after each national convention, whether or not someone from that local attended the convention. National Constitution revisions are normally reported in the national newsletter, *News and Views*. In addition, each local and state will receive new copies of the National Constitution free of charge as soon as they are printed, which usually takes several weeks. Anytime the local constitution is revised, a new revised local constitution should be sent to the National President for approval.

It is possible that revisions to the State Auxiliary Constitution may affect the Local Constitution, in which case the local should make revisions that apply whenever a conflict between the state and local constitution arises. From time to time, local Auxiliary members may choose to amend the local constitution. Once again, anytime the local constitution is changed, the revised constitution should be sent to the National President.

The Policy Statement

The policy statement differs from the Constitution and By-laws in that it is normally drafted and revised by the officers to explain how the officers are expected to function within the executive board. For example, the policy statement usually explains how expense vouchers are to be submitted and how the treasurer will reimburse officers and members for incurred expenses. The policy statement may list additional duties for the officers. Whereas the constitution states expectations *generally*, the policy statement states instructions and expectations *specifically*. This document need not be approved by the membership as a whole, but it may not be in conflict with the local constitution.

The National Auxiliary recommends that all State and Local Auxiliaries have policy statements that give officers clear instructions for the fulfillment of the duties that are assigned to them by the governing constitution. The National President or the National Secretary can provide sample policy statements that are in use by other auxiliaries.

CHARTERS

Once an Auxiliary is organized the Auxiliary may request a charter from the National Secretary. A charter is a certificate recognizing the group's official affiliation with the National Auxiliary to the American Postal Workers Union, AFL-CIO. Certain requirements must be met to be considered organized enough to receive a charter. The requirements are fully described in Article VIII, Section 5 of the National Auxiliary Constitution.



Charters shall be issued on request—as long as an EIN (employer identification number) is supplied to the National Secretary's office as well as a listing of elected or acting officers and charter members with addresses. No charter can be granted to an Auxiliary of less than four members. Duplicate charters cost \$2.00.

If the Auxiliary should drop below four members once it has already received a charter, the Auxiliary may still maintain its charter as long as one member is in good standing (current dues are paid). The members of that Auxiliary may attend National Convention, but are accorded the same voting power prescribed for Members-at-Large in Article V, Section 2c of the National Auxiliary Constitution.

Suspended Auxiliaries must surrender their charter. An Auxiliary is suspended when it is delinquent paying membership dues (per capita tax). Any Auxiliary affiliated with the parent body which fails to pay its per capita tax on the due date shall be notified by the National Treasurer after three months and shall become suspended from membership after six months. Once suspended the Auxiliary must surrender its charter to the Secretary and forfeit all privileges in the Auxiliary. (See Article IX, Section 6 of the National Auxiliary Constitution.)

The National President, with the advice and consent of the National Auxiliary Executive Board, has the authority to revoke the charter of any Auxiliary. Evidence must be shown that the Auxiliary is guilty of disloyalty or actions that are adverse or detrimental to the welfare of the members of the National Auxiliary. The Auxiliary whose charter has been revoked has the right to appeal to the members at the National Auxiliary Convention to have such action set aside or repealed. (Article IX, Section 7 of the National Constitution)

NATIONAL OFFICERS

PRESIDENT	Kathy Danek
SECRETARY	Patricia Lewis
TREASURER	Trisa Mannion
LEGISLATIVE AIDE-EDITOR	Barbara Maciejewski
DISTRICT 1 Coordinator	Colette Phillippe
DISTRICT 2 Coordinator	Rebecca Kingsley
DISTRICT 3 Coordinator	Bonnie Sevre
DISTRICT 4 Coordinator	Debra Stewart
DISTRICT 5 Coordinator	Vacant
DISTRICT 6 Coordinator	Clara Hill
DISTRICT 7 Coordinator	Joyce Tanguay

COMMITTEES & SPECIAL ASSIGNMENTS

Human Relations Advisor	Retirees Liaison
Organization Chairperson	Scholarship
Education Chairperson	Health Plan Liaison
Memorial Chairperson	Safety Information Officer

Chapter 3

Officers Elections and Responsibilities

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OFFICERS

Officers play a very important role within the Auxiliary. Besides providing leadership, officers also organize, advise, educate, motivate, encourage, and frequently supply the vision that propels the Auxiliary forward. Officers work to ensure that the wishes of the members are fulfilled. In return, officers need encouragement, ideas, cooperation, and assistance from the members. Auxiliary members should carefully select people who demonstrate leadership character to guide their organization.

Elections

Elections must always be above board and conducted by the most impartial members available. Although the Auxiliary is not required to follow the Department of Labor guidelines to conduct elections it is a good idea to use them as a basis for guidelines. They have been tried and tested many times. It is better to be cautious than re-run an election or lose members because of bad feelings.

Who Must Be Elected

Any constitutional officer, any person authorized to perform the functions of president, vice president, secretary, treasurer or other executive functions of the organization must be elected. Any officer with fiduciary responsibility must be elected.

Frequency of Elections

It is recommended that elections be held every two years. Your constitution should address the terms of officers. The time frame can run from one year to not more than three years.

Election Committee

This committee is appointed by the President. It should consist of an odd number of members. No committee member may be a candidate, nor should any committee member be related to a candidate. The impartiality of these members is imperative. The election committee actually conducts the elections. The executive board, with the leadership of the president, oversees the election committee. The election committee has the responsibility to ensure the fairness of the election. The chairperson is the liaison to the executive board.

Notice of Nominations

Reasonable notice must be given to each member in good standing. A notice in the newsletter, a complete mailing to each member, a notice posted in public view, or an announcement at the regular meeting are all considered reasonable notice. Normally a fifteen day period is sufficient, although a thirty day period is preferred. The organization's constitution should contain provisions for this procedure. The requirement of reasonable notice is met only when the members are fully informed of the proper method of making such nominations.

Nominations

The organization's constitution should clearly specify procedures for nominations. Nominations may be made from the floor or through a nominations committee. Self-nomination is allowed in conjunction with any of the preceding methods. It should not be used as the only method. Refer to Robert's Rules of Order for a detailed explanation and a question and answer section on nominations.

Candidates

Any member in good standing who has reached the age of 21 is eligible to hold office. Organizations may limit candidates through reasonable qualification standards such as:

Period of membership. This must be reasonable and take into account the possibility of membership in another locale.

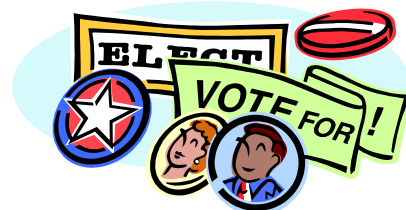
Continuity of good standing. This is reasonable and must take into account the ability to make missed dues payments.

Meeting attendance requirements. This is a reasonable way to ensure candidates have knowledge and interest in the organization. The requirements cannot be unreasonable or too restrictive. An adequate provision for excused absences must be provided.

Residency requirements. It is reasonable to require a regional or district officer to hold membership in the area represented.

Campaigns

This is the hardest part of the process to control. It is equally important to ensure each candidate has an equitable opportunity to reach each member with his or her campaign message while safeguarding fairness. The opportunity for members to have free, fair, and informed expression of the choices among candidates seeking office is a prime objective of an election committee.



Each organization must decide prior to the nominations the method that will be used to distribute campaign literature. It must be decided whether organizational money will be spent to distribute campaign literature. The decision whether to release the membership list must also be made. These decisions may require permission of the current executive board. The membership list must be made uniformly available or uniformly not available to all candidates. Campaign literature cannot be censored. You may have guidelines to ensure decency

Debates and speeches are permitted. All candidates must be given an equal opportunity to participate in such events.

Provisions within the organization's constitution, which do not violate any of the above restrictions will prevail.

Notice of Elections

A statement in the constitution stating the regular elections will be held at a certain time is not considered notice. The notice must be given fifteen days prior to the election. The offices for which an election is to be conducted must be listed. The date, time and place of the election must be given. A sample ballot may be distributed but is not considered notification in and of itself. If you follow the same rules for election notices as for nominations you will be in compliance.

Credentials Committee

This committee is normally used at state or national conventions. The committee is appointed by the president to calculate the number of votes given each delegate based upon the representation strength in the organization's constitution. The committee report is given to the delegation prior to the election. Delegates may appeal or dispute the representation strength allotted. A formal accounting is given to the elections committee prior to the balloting.

Election Procedures

Secret ballot is the only method acceptable in this organization and its affiliates. Mail ballot elections are discouraged but are allowed. Proxy votes are not allowed. Ballots are distributed, collected, counted, and verified by the election committee in an area separate from the meeting or convention.

Preservation of Records

Records must be sealed after the election results have been tallied. The election committee surrenders the documents to the secretary for safekeeping until the next regular election. If the election is contested the election committee retains the records until the matter is settled.

Election Results

Results are to be kept confidential until announced in the meeting or convention. Results are announced as part of the election committee's report to the membership. The total number of votes cast followed by the results for each officer should be announced. The results must be a permanent part of the report upon acceptance of the report by the membership. The minutes should reflect the same entries.

Re-run Elections

A re-run election will be conducted in the event of a tie or improprieties during the elections. This election is governed by the same guidelines as any other election.

Contesting an Election

If serious violations occurred in the election process or any part of the process, the election may be contested. Each constitution should have a method of contesting elections. If the affiliate organization does not have a procedure for contesting elections the National Constitution would be in effect.

Union Elections

Auxiliary members do not become involved in union politics. Campaigning for union candidates is strictly prohibited unless the union candidate is a relative.

Problems and Questions

National officers should be contacted if a problem arises. They can help with information and guidelines. When necessary the National President or designee can mediate disputes.

Resources

Elections of Officers of Labor Organizations, a manual printed by the Labor Department for guidelines in conducting elections.

Robert's Rules of Order, a guide to Parliamentary Procedure for civic organizations.

National Election and Campaign Rules ☒

Eligibility

Eligibility requirements for National Auxiliary Officers are found in the National Auxiliary Constitution, Article VI, Sec. 5:

- No person shall be eligible to any of the offices or to membership on any committee unless that person is a member in good standing.
- Any relative of members of the APWU shall be eligible for National Office.
- A National Officer shall not hold the office of State President, but shall be required to be a member of her/his respective State Auxiliary if there is one and if eligible to State membership.
- The minimum age of an officer in the Auxiliary shall be twenty-one (21) years.
- Good standing is defined in the National Auxiliary Constitution Article V,
- Article 5, Sec. 1(B): "In order to be seated as a delegated and able to vote on any issue during the National Convention, the per capita tax must be received by the National Treasurer at least twenty (20) days prior to the opening of the National Auxiliary Convention."

Offices Open For Election

All offices shall be posted for election in *News and Views* and in the National Board Offices at the National Convention.

Declaration of Candidacy

Any member who meets the eligibility requirements may declare candidacy for any office before noon on Wednesday at the National Convention.

If desired, candidates may have their names, local and office sought published in *News and Views* prior to the National Convention. All submissions to *News and Views* must be RECEIVED no later than forty five (45) days prior to the publication date. Contact the National Auxiliary Editor for information regarding publication dates.

Nominations

Nominations will take place Wednesday morning after the Memorial Service at the National Convention. (By-laws, Article II, Section 1(F) Nominations will be taken in any oral form from the floor of the National Convention by any delegate to the convention. Nominations are to be positive presentations limited to two (2) minutes per candidate. No motion or speech to second a nomination will be allowed.

No criticism, reflection, argument or debate touching any member's creed, color, sex, nationality, or political affiliation shall be allowed at any meeting of the Auxiliary to the American Postal Workers Union or at the meetings of any of its Auxiliaries or published in print. (National Auxiliary Constitution Article X)

Campaign Rules

No campaign mailings will be allowed. All mailing lists are secure and shall not be given to or used by any candidate to further his/her campaign.

All campaign material to be distributed **MUST** be approved by the Election Committee prior to distribution. The committee shall be available during the National Convention. Unapproved material will be automatically and immediately confiscated. No libelous or slanderous material will be tolerated. All campaigns should be positive in nature.

Campaigning will begin at the start of registration at the National Convention.

No campaign articles may be published in *News and Views*.

An Auxiliary may not use any funds received from dues, assessments, or similar levies to promote any person's candidacy.

Elections

Elections shall be on Thursday afternoon of the National Convention (National By-Laws, Article VII, Part 4). The officers will be elected in the following order: President, Secretary, Treasurer, Legislative Aide/Editor, and District Coordinators. A plurality vote shall decide the election. In the event of a tie, there shall be a run off vote. Other election rules will be set by the Election Committee and the body at the National Convention.

Protesting Elections

Any member may file a complaint within 24 hours to the Election Committee Chairman. If just remedy is not met, the candidate may then file a complaint to the National Executive Board of the Auxiliary to the American Postal Workers Union within 30 days of the election results.

President's Responsibilities



Communication

- Communicate frequently with your officers, members, and your National District Coordinator.
- Keep lines of communications open with state and local APWU officers and members.
- Make sure you are always timely with your correspondence.
- Send articles to APWU and Auxiliary publications on a regular basis.
- Remind your members that you need to hear from them. Remember, you are representing them.
- State Presidents should send a request for time to address all delegates during the state convention to the state APWU President before the convention.

Leadership

- State Presidents shall preside at all conventions and at all meetings of the State Auxiliary Executive Board.
- State Presidents should be prepared and willing to represent the State Auxiliary at the National Auxiliary Convention if elected by the State Auxiliary.
- Local Presidents shall preside at all local meetings and all meetings of the Local Auxiliary Executive Board.
- Local Presidents should attend the State Auxiliary convention, and if possible the National Auxiliary convention. The Local Auxiliary elects delegates to conventions. The President should be prepared and willing to represent the Local at all conventions.

President's responsibilities—continued from page 26

- ✧ Appoint all necessary committees for your Auxiliary and be an ex officio member of all committees.
- ✧ Assist the Treasurer and Finance Committee with preparation of a budget and oversight of expenditures. Sign all vouchers for the expenditure of funds by the Treasurer.
- ✧ Be empowered to sign all checks in the event of the death, resignation or incapacitation of the Treasurer.
- ✧ Fill all vacancies arising from any cause with the approval of your Auxiliary Executive Board. Officers appointed to fill a vacancy shall serve until the next scheduled election.
- ✧ Promote Auxiliary and APWU programs.
- ✧ Turn over all records to your successor.

Recruiting and Recognizing Members

- ✧ The State President should contact any APWU Local that does not have an Auxiliary. Request a meeting with the union officers and offer assistance for forming an Auxiliary. Make sure that the Local APWU Officers know the name of the National Auxiliary District Coordinator for your area. Keep records of your meeting and report your efforts in writing to your National District Coordinator.
- ✧ Local Presidents should attend APWU Local meetings as often as possible to promote the Auxiliary and offer Local Auxiliary assistance.
- ✧ State Presidents should attend APWU State meetings and workshops as often as possible to promote the Auxiliary and offer State Auxiliary assistance.
- ✧ Recognize each new Auxiliary and each new member immediately and make them feel welcome at meetings.

Further suggestions are included in this handbook in Chapter 4 -- Meetings



Vice President's Responsibilities

Since the duties and number of Vice Presidents vary from Auxiliary to Auxiliary, your responsibilities will depend on the Constitution of your State or Local Auxiliary. Therefore, you should begin your term of office by reading your Auxiliary constitution and becoming familiar with all of its provisions. In general, your responsibilities are:

- ✧ Communicate with your Local and State Auxiliary Presidents frequently.
- ✧ Familiarize yourself with the duties of your President to prepare yourself in the event that you must assume those duties if mandated by your Auxiliary constitution.
- ✧ Attend as many Auxiliary and APWU meetings and conventions as possible. This helps keep the Auxiliary visible and informed.
- ✧ Encourage the recruiting efforts of all Auxiliary members. Send follow up letters that reinforce the efforts of your Auxiliary President.
- ✧ Promote Auxiliary and APWU programs.
- ✧ Recognize new members and new Auxiliaries.
- ✧ Turn over all records to your successor.



Secretary's Responsibilities

You are the chief recording officer of the Auxiliary. As Secretary you assist the President by taking notes and being able to explain at any time what is pending during a meeting. State and Local Secretaries must keep correct and impartial minutes of meetings and maintain all Auxiliary records, reports, and documents. In the absence of the President and Vice President, the Secretary must be prepared to preside.

When taking minutes record the exact wording of all motions, the person making the motion, the person seconding the motion, the results of the vote and the action taken. The general discussion need not be recorded unless the discussion clarifies the motion. Reports of all committees should be recorded. Minutes and other records should be authenticated with your signature.

General Duties

- * Be on the executive committee of your Auxiliary.
- * Answer all correspondence as deemed necessary by the President.
- * Be custodian of duplicate membership records as provided by the Treasurer.
- * Provide the President with a list of unfinished business prior to the beginning of each meeting.
- * Prepare a roll call of members.
- * Read the minutes and any papers that may be called for by the President.
- * Bring a copy of your Auxiliary's Constitution and By-laws, minutes of previous meetings, a list of all committees, and at least an abbreviated Parliamentary Procedure. (*see Chapter 4 of this handbook*).
- * The Secretary may verify the Treasurer's financial records. When verifying records make sure all check stub amounts are correct, checks are drawn on the appropriate accounts, and accounts are in order. If you discover errors, notify the President and Treasurer in writing. Follow up to ensure corrections have been made. (Also see Audit Procedures For Affiliate Organizations in this chapter of the handbook.)
- * Order supplies from the National Secretary.
- * Keep a correct listing of current officers' names, addresses and phone numbers. Send any changes to the following: State Secretary (if you are a Local Secretary), National Secretary, National District Coordinator, and the APWU Legislative Director.
- * Turn over all books, records, and property of your Auxiliary to your successor.

Additional Duties for State Secretaries

- * Maintain a complete listing of all members in your State. Keep your records up to date and available.
- * Prepare and send out credentials for State Convention and assist the credentials committee at the State Auxiliary Convention.
- * Prepare a convention call.
- * Make up committee folders with instructions for each State Convention committee.



Legislative Aide's Responsibilities

As a Legislative Aide you should be responsible for contacting all members of Congress in your District. Stay informed and have up-to-date legislative information at all times. Report on Legislation at your Auxiliary meetings. Assist your APWU and Auxiliary with legislative and political activities including letter writing, get out the vote activities, COPA fund raising, telephone communications, and general campaign work.



Editor's Responsibilities

The duties of the editor are frequently added to one of the other offices. The editor is responsible for the consolidation, editing and publication of Auxiliary materials. This is extremely important because a newsletter may be the main communication link between some of the members and the Auxiliary, it also keeps members informed between meetings.

The editor must maintain mailing records and provide address updates to the Treasurer on no less than a quarterly basis. Provide a copy of all mailing records to the Secretary for safekeeping at least quarterly. Turn over all Auxiliary property to your successor.

Treasurer's Responsibilities



Remitting National Dues

Treasurers must pay all National per capita (dues) to the National Treasurer. Pay all members on the same date, this will eliminate confusion. Per capita is payable in advance of due date (National Constitution, Article VIII, Section 3). Please endeavor to do this. Use the dues paying form furnished by the National Treasurer. When filled out properly, it has all the information necessary to keep accurate records, such as: name of Auxiliary, number of members paying, date paying for and a current officers listing. Be sure to check the receipt received from the National Treasurer. If an error has been made notify the National Treasurer as soon as possible so it may be corrected.

When paying dues for a new Auxiliary send the following information to the National Treasurer: date organized (for the charter), dates paying from and to, number of members paying for, and names, addresses and telephone numbers of the officers and members.

For further information about dues see Payment of Per Capita (Dues) in Chapter 2 of this handbook.

General Duties

- * Receive all monies of your Auxiliary and give receipts for all monies received.
- * Be a member of your Auxiliary's budget committee.
- * Be a member of your Auxiliary's executive committee.
- * Prepare a monthly and quarterly financial report to be sent to the President and the Secretary.
- * Have an audit of your books at least once a year.
- * State Treasurers shall send a complete membership listing to the National Treasurer for verification before convention.
- * Turn over all books, records and Auxiliary property to your successor.

Employee Identification Number (EIN)

All Auxiliaries are required to have an Employee Identification Number (EIN). See Chapter 2 for information about the EIN and how to obtain one.

Completion of IRS Form 990-N —e-Postcard

Who Must File Form 990-N or IRS e-Postcard

All state and local Auxiliaries must file. The last known treasurer should have received the notice, in the last several months, that this is now required. If the treasurer did not receive this notice the local or state must file the form anyway. I attempted to have our organization exempted from this process but was not successful. Please let me know if you did not receive this notice. tmaux@aol.com

When it Must Be Completed

The e-Postcard is due every year by the 15th day of the 5th month after the close of your tax year. For example, if your tax year ended on December 31, the e-Postcard is due May 15. **You cannot file the e-Postcard until after your tax year ends. Create the login now so you will know the fiscal year for your organization, you can file the e-postcard at a later date. Some locals and states used a fiscal year instead or the calendar year when they requested their EIN. This should be reflected in your constitution unless it was changed and the IRS was not notified. The best way to find out is to register for a login and then attempt to complete the 990-N (e-Postcard).**

How To File

<http://epostcard.form990.org/> is the address of the site you will need to use to file the e-Postcard with the IRS through their partner, Urban Institute. The form must be completed and filed electronically. There is no paper form. Libraries have computers that can be used to file this form if you do not have one available but you will need an email address to register to file the form.

Information You Will Need To File the e-Postcard

The e-Postcard is easy to complete. All you need is the following information about your organization. .

- Employer identification number (EIN), also known as a Taxpayer Identification Number (TIN)).
- Tax year
- Legal name and mailing address
- Any other names the organization uses (this is the DBA field)
- Name and address of a principal officer (usually this is the treasurer)
- Web site address if the organization has one (local or state)

Confirmation that the organization's annual gross receipts are normally \$50,000 or less

If applicable, a statement that the organization has terminated or is terminating (going out of business)

Suggested Best Practices

- Make the password something that can be given to the next Treasurer.
- Print each page, including the "Active Login ID" page and file in a safe and secure place. Share the above with another officer to avoid being locked out. (The National Treasurer will file this information for your convenience)

- Call for assistance if you need help.
- Check the status page until it shows that your form has been accepted.
- Print the acceptance and file.
- View and Print the "View Form 990-N (e-Postcard"
- Send a copy of the acceptance and the "viewed" form to the National Treasurer.

DO NOT IGNORE CORRESPONDENCE FROM THE INTERNAL REVENUE SERVICE!

Form **2848**
 (Rev. March 2012)
 Department of the Treasury
 Internal Revenue Service

Power of Attorney and Declaration of Representative

▶ Type or print. ▶ See the separate instructions.

OMB No. 1545-0150

For IRS Use Only

Received by:

Name _____

Telephone _____

Function _____

Date / / _____

Part I Power of Attorney

Caution: A separate Form 2848 should be completed for each taxpayer. Form 2848 will not be honored for any purpose other than representation before the IRS.

1 Taxpayer information. Taxpayer must sign and date this form on page 2, line 7.

Taxpayer name and address	Taxpayer identification number(s)
	Daytime telephone number
	Plan number (if applicable)

hereby appoints the following representative(s) as attorney(s)-in-fact:

2 Representative(s) must sign and date this form on page 2, Part II.

Name and address Auxiliary to the APWU 3038 Cloverdale Ct Grand Junction CO 81506	CAF No. _____ PTIN _____ Telephone No. <u>970-245-312</u> Fax No. <u>970-243-7706</u> Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
Check if to be sent notices and communications <input type="checkbox"/>	
Name and address	CAF No. _____ PTIN _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>
Check if to be sent notices and communications <input type="checkbox"/>	
Name and address	CAF No. _____ PTIN _____ Telephone No. _____ Fax No. _____ Check if new: Address <input type="checkbox"/> Telephone No. <input type="checkbox"/> Fax No. <input type="checkbox"/>

to represent the taxpayer before the Internal Revenue Service for the following matters:

3 Matters

Description of Matter (Income, Employment, Payroll, Excise, Estate, Gift, Whistleblower, Practitioner Discipline, PLR, FOIA, Civil Penalty, etc.) (see instructions for line 3)	Tax Form Number (1040, 941, 720, etc.) (if applicable)	Year(s) or Period(s) (if applicable) (see instructions for line 3)
	All forms	all years

4 Specific use not recorded on Centralized Authorization File (CAF). If the power of attorney is for a specific use not recorded on CAF, check this box. See the instructions for Line 4. Specific Uses Not Recorded on CAF

5 Acts authorized. Unless otherwise provided below, the representatives generally are authorized to receive and inspect confidential tax information and to perform any and all acts that I can perform with respect to the tax matters described on line 3, for example, the authority to sign any agreements, consents, or other documents. The representative(s), however, is (are) not authorized to receive or negotiate any amounts paid to the client in connection with this representation (including refunds by either electronic means or paper checks). Additionally, unless the appropriate box(es) below are checked, the representative(s) is (are) not authorized to execute a request for disclosure of tax returns or return information to a third party, substitute another representative or add additional representatives, or sign certain tax returns.

Disclosure to third parties; Substitute or add representative(s); Signing a return; _____

Other acts authorized: _____ (see instructions for more information)

Exceptions. An unenrolled return preparer cannot sign any document for a taxpayer and may only represent taxpayers in limited situations. An enrolled actuary may only represent taxpayers to the extent provided in section 10.3(d) of Treasury Department Circular No. 230 (Circular 230). An enrolled retirement plan agent may only represent taxpayers to the extent provided in section 10.3(e) of Circular 230. A registered tax return preparer may only represent taxpayers to the extent provided in section 10.3(f) of Circular 230. See the line 5 instructions for restrictions on tax matters partners. In most cases, the student practitioner's (level k) authority is limited (for example, they may only practice under the supervision of another practitioner).

List any specific deletions to the acts otherwise authorized in this power of attorney: _____

6 Retention/revocation of prior power(s) of attorney. The filing of this power of attorney automatically revokes all earlier power(s) of attorney on file with the Internal Revenue Service for the same matters and years or periods covered by this document. If you do not want to revoke a prior power of attorney, check here **YOU MUST ATTACH A COPY OF ANY POWER OF ATTORNEY YOU WANT TO REMAIN IN EFFECT.**

7 Signature of taxpayer. If a tax matter concerns a year in which a joint return was filed, the husband and wife must each file a separate power of attorney even if the same representative(s) is (are) being appointed. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, or trustee on behalf of the taxpayer, I certify that I have the authority to execute this form on behalf of the taxpayer.

▶ IF NOT SIGNED AND DATED, THIS POWER OF ATTORNEY WILL BE RETURNED TO THE TAXPAYER.

Signature	Date	Title (if applicable)
Print Name	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> PIN Number	Print name of taxpayer from line 1 if other than individual

Part II Declaration of Representative

Under penalties of perjury, I declare that:

- I am not currently under suspension or disbarment from practice before the Internal Revenue Service;
- I am aware of regulations contained in Circular 230 (31 CFR, Part 10), as amended, concerning practice before the Internal Revenue Service;
- I am authorized to represent the taxpayer identified in Part I for the matter(s) specified there; and
- I am one of the following:
 - a Attorney—a member in good standing of the bar of the highest court of the jurisdiction shown below.
 - b Certified Public Accountant—duly qualified to practice as a certified public accountant in the jurisdiction shown below.
 - c Enrolled Agent—enrolled as an agent under the requirements of Circular 230.
 - d Officer—a bona fide officer of the taxpayer’s organization.
 - e Full-Time Employee—a full-time employee of the taxpayer.
 - f Family Member—a member of the taxpayer’s immediate family (for example, spouse, parent, child, grandparent, grandchild, step-parent, step-child, brother, or sister).
 - g Enrolled Actuary—enrolled as an actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242 (the authority to practice before the Internal Revenue Service is limited by section 10.3(d) of Circular 230).
 - h Unenrolled Return Preparer—Your authority to practice before the Internal Revenue Service is limited. You must have been eligible to sign the return under examination and have signed the return. See Notice 2011-6 and Special rules for registered tax return preparers and unenrolled return preparers in the instructions.
 - i Registered Tax Return Preparer—registered as a tax return preparer under the requirements of section 10.4 of Circular 230. Your authority to practice before the Internal Revenue Service is limited. You must have been eligible to sign the return under examination and have signed the return. See Notice 2011-6 and Special rules for registered tax return preparers and unenrolled return preparers in the instructions.
 - k Student Attorney or CPA—receives permission to practice before the IRS by virtue of his/her status as a law, business, or accounting student working in UTC or STCP under section 10.7(d) of Circular 230. See instructions for Part II for additional information and requirements.
 - r Enrolled Retirement Plan Agent—enrolled as a retirement plan agent under the requirements of Circular 230 (the authority to practice before the Internal Revenue Service is limited by section 10.3(e)).

▶ IF THIS DECLARATION OF REPRESENTATIVE IS NOT SIGNED AND DATED, THE POWER OF ATTORNEY WILL BE RETURNED. REPRESENTATIVES MUST SIGN IN THE ORDER LISTED IN LINE 2 ABOVE. See the instructions for Part II.

Note: For designations d-f, enter your title, position, or relationship to the taxpayer in the "Licensing jurisdiction" column. See the instructions for Part II for more information.

Designation— Insert above letter (a-r)	Licensing jurisdiction (state) or other licensing authority (if applicable)	Bar, license, certification, registration, or enrollment number (if applicable). See instructions for Part II for more information.	Signature	Date
D				

Audit Procedures For Affiliate Organizations

As mandated by the 1992 National Convention in Anaheim, California, the Auxiliary to the American Postal Workers Union has devised this audit procedure to insure the fiduciary responsibility of the Auxiliary. Within these guidelines you will find answers to the following questions:

- ◆ Why are we required to audit these records each year?
- ◆ What are we looking for?
- ◆ Why do we need to complete vouchers?
- ◆ Who authorizes payment?
- ◆ What records should be available?
- ◆ How often do we audit the books?
- ◆ As a Treasurer, how do I separate my accounts to be in line with the parent organization?

This outline should be adapted to meet your needs. Be cautious to stay within the parameters of common sense and good accounting procedures. Do not change steps that will cause you to violate laws or the constitution. These procedures are a revision and adaptation of the APWU audit procedure set forth by Paul J. Gillis, CPA. If you learn and follow the guidelines set forth herein, the records of your Auxiliary affiliate will be clear and correct.

Procedures For Auxiliary Audit Committees

The purpose of an in-house audit by a committee is generally to satisfy either a constitutional requirement or to allow the members oversight of the financial affairs of the Auxiliary. An audit is the best deterrent to fraud or embezzlement. Reliable assurances can only be obtained through an objective audit. The committee should not include a person whose work is under review.

This outline is intended as a guide for audit committees of state and local organizations. It is only an outline and should be added to as circumstances require. It is desirable, but not absolutely necessary, that the members of the committee have some familiarity with the nature and scope of operations before they begin their assignment. The following procedures should provide the necessary background.

The committee's responsibilities can be divided into four major areas, or functions:

1. Selection of audit objectives
2. Review of background material
3. Application of specific audit procedures
4. Preparation of a report to the membership

Selection of Audit Objectives

An audit may be general or specific, depending upon the needs of the organization. When a CPA performs a regular audit, an overall or general opinion is expressed. No absolute accuracy is asserted; only that the financial statements are substantially or materially correct. Stated another way, the auditor's letter expresses an opinion on the financial statements taken as a whole, and not to the details thereon. Secondly, the normal audit conducted by a CPA is not designed to detect fraud or embezzlement, although it may

uncover such occurrences.

Audit Procedures For Affiliate Organizations Continued

The detection of fraud would be an example of a specific audit objective as opposed to a general objective of expressing overall assurances. Other examples of specific audit objectives include the following:

- ⇒ Has the Affiliate received (and deposited) all monies forwarded to it by the National Auxiliary, members and/or locals?
- ⇒ Have all disbursements been properly authorized, as required by law, minutes and the constitutions?
- ⇒ Are disbursements supported by adequate documentation, i.e. receipts, vouchers, signatures?
- ⇒ Is the local/state in compliance with its reporting and disclosure obligations under the Internal Revenue Code (IRC)?
- ⇒ Were all expenditures for the benefit of the members as a group, or did some expenditures result in private benefit or profit?
- ⇒ Are vouchers signed by the required officers and members?

The facts and circumstances of your particular need will determine whether the audit committee selects a general or specific objective (s) and what that specific objective (s) may be.

Review of Background Material

Reference material to be reviewed by the committee members before beginning their specific review procedures:

- ◆ Constitution and By-laws of the organization and of the National Auxiliary.
- ◆ Minutes of membership meetings.
- ◆ Minutes of Executive Board meetings.
- ◆ Copies of current year's and preceding year's annual reports and the related instructions of the Internal Revenue Service (IRS) such as Form 990 and 990T.
- ◆ A copy of the APWU Secretary/Treasurer's Manual (optional).
- ◆ Any long-term (more than one year) leases for tangible personal property or real property, deeds for real property, mortgage loan documents, loan agreements, etc.
- ◆ The report of the prior year's audit committee.
- ◆ A copy of the local's/state's fiduciary bond.
- ◆ A copy of last year's and this year's report and correspondence of the outside accountant or CPA (where applicable).
- ◆ Copies of any other contracts with officers, members, or outside third parties.
- ◆ Employer Identification Number (EIN).
- ◆ Equipment inventory (equipment is generally \$250.00 value or greater).
- ◆ Property inventory lists.
- ◆ Membership records.

It must be noted that Section 501(a) of the LMRDA requires that all expenditures be made "...in accordance with its constitution and by-laws and any resolutions of the governing bodies adopted there under." That means all disbursements must be "authorized." The four major classes of authorizations are as follows:

- ✳ Statutory (IRS Form 990, Gaming laws, Raffle tax)
- ✳ Constitutional (payment or reimbursement of officers pursuant to the applicable sections of the affiliates constitution.
- ✳ Standing Body Motion (a resolution at the beginning of the year as an "umbrella" type resolution to cover normal operating expenses. Often a budget will serve this purpose.
- ✳ Current body Motion (a resolution addressing specific non-recurring or occasional expenditures such as attending a convention, seminar or meeting.

Familiarity with the various reference documents cited above will provide the audit committee background knowledge of the affiliate's operations and the various rules to which those affairs are subject. That knowledge will provide the audit committee members with the objectivity, judgment, and confidence necessary to render a Audit report and complete their assignment.

Audit Procedures For Affiliate Organizations Continued

It will be virtually impossible for the committee members to make an effective review of the local's operations without becoming familiar with the pertinent portions of the documents listed above. The members of the committee may find it helpful to prepare a check list to be submitted in advance to the local officers so that the materials will be available when needed. The Treasurer should provide the basic material listed above before being asked. The list also helps to serve as a reminder for additional inquiry or follow-up action if any documents are missing.

Specific Audit Procedures

These may be applied on a 100% basis or a sample basis as deemed necessary by the committee members. The greater the volume of transactions, the greater the likelihood of using some sort of sampling technique (random sampling, block sampling, or all large dollar items over a certain threshold and some under, etc.)

The kinds of financial records which the audit committee should expect to have available are:

- \$ Cash receipts, journals, deposit slips, remittance advises, including National Auxiliary list of monies sent to the local.
- \$ Cash disbursement journals, paid bills, invoices, and receipts.
- \$ Bank statements, canceled checks, bank reconciliations, any bank documents.
- \$ Payroll earnings records and payroll tax returns.
- \$ General ledger, combined journal, or some other record which shows accumulated year to date financial totals.
- \$ IRS reports, accountant's reports, etc.
- \$ Chart of accounts.
- \$ Accounting of the Activity/Organizational Funds

THE SPECIFIC PROCEDURES ARE TO BE APPLIED AS FOLLOWS:

Compare bank deposits to cash receipt entries for the period being audited. Check the addition of the cash column to verify totals.

Compare specific cash receipt entries to transmittal sheets, or remittance advises:

- a. Dues remitted by local and/or members
- b. Funds remitted by APWU
- c. Funds remitted by National Auxiliary
- d. Other, interest income, fund raisers, dances, picnics, ceremonial and installation dinners, etc.

Add the cash column of the cash disbursements journals to verify the monthly/annual totals.

Compare canceled checks to the cash disbursements journals or verify payee name, endorsement, amount, date, and propriety of the account classification. The account classification should reflect the true nature of the expenditure rather than to obscure or mislead the reader of the financial reports.

Check bank reconciliations and compare them to the bank statements and books.

Compare paid invoices to cash disbursement journal entries for payee, amount, date, and account classification.

Using minutes of the membership meetings, Executive Board, Budget committee meetings, verify that all disbursements which required approval were in fact approved. It may be necessary to obtain the approval retroactively where it is missing, otherwise those unauthorized disbursements may end up as exceptions in the report of the audit committee. Reason and prudence should be applied here; i.e. the frequency, nature and amount of unauthorized items should be considered before requiring retroactive approval or listing as an exception. Judgment should be exercised in this matter.

Payments should be supported by an approved voucher which establishes the exact dates, amount spent, receipts, nature or services rendered, amount of charge.

Telephone vouchers should include the following information:

- a. A log should show time and place of call, cost of call, number called, person or firm called, and reason for the call.
- b. Copy of the telephone bill.
- c. Signature verifying the information is correct

Compare year end ledger account totals to totals set forth on Form 990 (where applicable.) Review all contracts to ensure compliance. Also verify that there exists the required approval (membership, board, budget committee, etc.) for them.

Drafting the Report

The report should be divided into five sections:

- ❑ A brief statement of purpose (objectives earlier agreed upon).
- ❑ A listing of the documents reviewed.
- ❑ A short statement (listing) of procedures followed. If a random sampling was used that should be disclosed without going into the kind or extent of sampling used. However, the committee's supporting records should record that data. This listing will probably closely follow the outline above, with additions or exceptions as need assistance for the appropriate wording.
- ❑ A listing of exceptions requiring corrective action and a listing or recommendations for how such corrections can be carried out. In most instances retrospective corrections will not be required. Rather, the recommendations will be prospective in nature; that is, they will suggest future procedures and safeguard in order to avoid needless repetition of prior difficulties.
- ❑ A conclusion expressing the opinion of the committee with respect to its findings. That opinion may reflect general satisfaction, except for specifically enumerated exceptions, or a general lack of satisfaction as to the accuracy or reliability of the reports, books, records, and documents examined.

General satisfaction does not mean perfect or absolute satisfaction. It may be that a few exceptions noticed are not material or substantial enough to "qualify" an overall expression of satisfaction. In that instance the written report may be supplemented by a short, face to face meeting with the responsible officers to alert them to the committee's findings and to encourage their continual efforts to carry out and document fiduciary obligations.

If the exceptions are of sufficient number, or are of such a nature of dollars or magnitude, the committee may conclude that it is necessary to set forth in the written report an enumeration of the exceptions encountered. Material exceptions should be specifically, but briefly, described. Numerous small exceptions may be identified as a class rather than individually listed. If remedial action is required that should be noted. If remedial action is required, the Committee should issue a supplemental report which discloses whether or not the recommended actions were taken and what the consequences of those actions are.

If at the draft stage of the report, the committee is confronted with the possibility that it is unable to express an opinion as to the overall satisfaction or qualified satisfaction, it may wish to seek assistance from the National Auxiliary as to recommended wording. If it is possible, the report should state what steps may be necessary to rectify unfavorable findings. At a later date the committee should issue a supplemental report disclosing whether or not the suggested corrections were made and its satisfaction with the matters as a result.

It is possible, of course, that the committee will find itself reporting on a condition, which while unsatisfactory, is not susceptible of remedial action. In such an instance the committee may find it necessary to state that it believes that practicable remedy can be found even though it has rendered an opinion that its findings were unsatisfactory or that the object (purpose) of its report could not be completed due to the state of (or lack) of records.



Review of the Most Often Asked Questions

- ❑ Who should audit the books (member, committee, or CPA)?
The answer will depend on what you want to find out. See section on audit objectives for your answer.

- ❑ What materials do we audit or have audited?
All records should be made available to the committee. The Treasurer should make every effort to accommodate the committee's requests. Refer to the section on specific audit procedures for a list of necessary documentation.

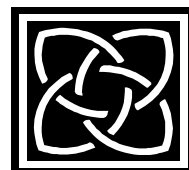
- ❑ When should an audit be done?
*An audit should be performed at the end of the fiscal year. A few weeks may be necessary to close the books for the year and to prepare the statements needed. For State Auxiliaries the best time is usually at the State Convention.
If a change in the office of Treasurer occurs, an audit should be conducted immediately to protect the last and incoming officer.
If you have good cause to suspect fraud, theft, or any major misrepresentation, an audit should be requested immediately. If any of these conditions occur an outside audit should be conducted ASAP. Contact the National Auxiliary for instructions before you proceed under these circumstances.*

- ❑ Where should an audit be performed?
The committee and Treasurer (or officers responsible) should agree upon a location that is mutually satisfactory.

- ❑ Why should we bother to audit the books? Our officers are very trustworthy and responsible. We wouldn't want them to think we would believe they are dishonest.
An audit is performed to protect the officers and the membership alike. Keep in mind the old adage an ounce of prevention is worth a pound of cure. Most constitutions require an audit be completed at least annually. It is the common fiduciary responsibility of the Executive Board to exercise reasonable care with the funds and to have knowledge that reasonable care has been taken with all books, records, and the accounting of funds and the best way to ensure this is to conduct an audit.

- ❑ What accounts should I use to be in line with the National Auxiliary records?
Accounts that best represent your expenditures should be used. Refer to the section on specific procedures number 6. If in doubt contact the National Treasurer for assistance.

Note: This section on audit procedures was reviewed in 2007—the e-postcard form 990-N was added in March, 2008



Officer Installation

An installation is a formal ceremony that officially recognizes newly elected officers. The main component of the ceremony is the oath of office which is normally led by the highest ranking officer in attendance or a past president of the organization. An installation may include any of the following: a flag ceremony, the Auxiliary collect, speeches, poetry, music and/or special presentations. To see an example of a formal installation that incorporates most of these components watch a Presidential Inauguration.

While no Auxiliary is required to hold an installation, there are several reasons for holding one. An installation honors newly elected officers, impresses the responsibility of the office on the new officers, causes members to recognize the status of the new officers, and may lead members to seek election to one of the offices in future elections. A well planned installation is very impressive to new members and guests. Most often a simple ceremony is best. A lengthy installation at a state convention banquet may be most unwelcome.



★ AUXILIARY ★

Official Auxiliary Oath of Office

Will each of you please raise your right hand and repeat after me, using your name where I use mine.

I, (name), having been duly elected to the office in the (State), (National), (Local) of the auxiliary to the American Postal Workers Union, AFL-CIO do solemnly pledge to uphold the Constitution and By-Laws of the Auxiliary to the APWU, AFL-CIO and the (State), (Local) or (National).

I further pledge to perform the duties of my office to the best of my ability. I promise that at the conclusion of my term of office, I will turn over to my successor, all bank accounts, jump drives, laptops, CD's, digital forms of information files, format files, equipment, all books, papers, records, documents and all other items that are the property of the Auxiliary to the APWU.

I promise to support and promote the American Postal Workers Union, AFL-CIO and to purchase only union made articles, whenever available.

You may lower your hands. With the power vested in me, I now declare these officers duly installed and congratulate each of you. May I present your new officers.

Chapter 4

Running Effective Meetings & Parliamentary Procedures

Chapter 4 Meetings

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MAKING THE MOST OF MEETINGS

The secret of success for any organization is to entice members to attend meetings, yet many people find meetings unproductive and a waste of time. You can avoid traps that cause your meetings to drag by simple planning. Start with the basics: set goals, follow an agenda, and establish an atmosphere where everyone is encouraged to take part.

Setting Goals

Goals are essential. They give the group direction, and they make the group a reflection of the members as opposed to a reflection of one or two officers. Goals show you where you're going and where you've been. They help you know when you are successful.

Goals should have the three SAM criteria:

S = Specific (Clear, who, how, when, where, etc.)

A = Attainable (realistic, reachable)

M = Measurable and written down so you know when you have reached them

Begin your goal statement with "We want to..." or just "To..." and follow with an observable verb such as sponsor, recruit, change, conduct, train, increase, improve, establish, etc. The goal statement should state what the group wants to accomplish within a relatively long time frame (e.g. a year or term of office). The statement should identify a result, something you can evaluate later. It should be realistic but present enough of a challenge to make it worth working toward. It should tie directly back to the basic purpose of the organization.

Examples

- We want to raise \$500 for COPA by the next state convention.
- To recruit 5 new members by December 31.
- We want to sponsor a leukemia fund raiser by January 15.

A bad example of a goal: We want to have more members involved. (Not specific or measurable which makes it unattainable. How many? How often?)

Objectives

The objectives relate directly to the established goal. The objective statement also begins with the word "to" which is followed by an action verb. The objective defines a single key result. It is also specific and indicates a target date for accomplishment. It specifies the what and when needed to accomplish the goal. It is realistic and attainable, yet challenging. It is consistent with the resources available, and with organization rules, policies and practices.

Objective Examples

Goal: We want to raise \$500 for COPA by the next state convention.
 Objective: We want to have a pancake feed on Sep.. 30 to raise at least \$250 of the \$500 needed for COPA.

Goal: To recruit 5 new members by December 31.
 Objective: To conduct a membership drive that begins August 31 and ends on December 31.

Tasks

Once goals and objectives are established, tasks to accomplish objectives should be laid out. As tasks are determined a person should be assigned to carry each one out and a deadline should be established.

Goal: We want to raise \$500 for COPA by the next state convention.
 Objective 1: We want to have a pancake feed on Sep.. 30 to raise at least \$250 of the \$500 needed for COPA.

<u>Tasks for Objective 1</u>	<u>Person Responsible</u>	<u>Deadline</u>
Appoint a Chairperson	Martha	June 15
Arrange for use of union hall	Carol	July 1
Publicity for event	David	Sep. 1
Buy supplies in bulk	Jan.	Sep.. 20

The Planning Meeting

While group leaders should assume responsibility for insuring that the organization has written goals (and objectives), goal setting, itself, should be a function of the entire membership. The process should involve all who will be affected by or involved in working to attain the goals.

Goals should be set as early in the year or term of office as possible. Progress toward goals should be evaluated regularly, perhaps monthly or quarterly.

Goal setting cannot be done in a regular meeting as part of the standard agenda. Good goal setting takes time and concentration. It is best to call a special meeting or retreat when members can give it careful thought, consideration, and energy. A goal planning worksheet is included in Chapter 8 of this handbook and a bibliography is provided at the end of this section for further information about goal setting.

There are several methods to follow. All begin with brainstorming followed by prioritizing and formulation of the goal and objective statements. Even if you fall short of fully realizing the goals you set, by implementing and following through on this process step-by-step, at least you'll know at what point and by whom the proverbial ball was dropped, and you'll be able to revise your strategy in the future to prevent the same mistakes. Goal setting. Important? Essential. Time consuming? Sort of. Worth it? Absolutely!

CONDUCTING BUSINESS



The Meeting Agenda

The meeting agenda is a schedule or program to follow when conducting business. It may also be referred to as the Order of Business in by-laws and convention booklets. Agendas should be used at all meetings, including committee meetings, to bring some organization to the items to be discussed. Agendas also help members remember what business needs to be discussed. It is normally the responsibility of the president or chairman to prepare the agenda. Every agenda should have the name of the auxiliary and the date of the meeting as a heading. It may be desirable at some meetings of auxiliary members to include the Auxiliary Collect and Pledge of Allegiance to the flag. These would normally be done at the start of the meeting.

The following sample agenda follows an order of business recommended by Robert's Rule of Order with some additions specific to the auxiliary:

MEETING AGENDA

Name of Auxiliary and/or Name of Committee	Date of Meeting
---	------------------------

- * Auxiliary Collect
- * Pledge of Allegiance
- * Roll Call of Officers and members

- * Reading of Minutes of Previous Meeting
- * Treasurer's Report and Expense Vouchers
- * Correspondence

- * Reports of Standing Committees
- * Reports of Special Committees

- * Old or Unfinished Business
- * New Business

- * Additional Comments

- * Adjournment

Committees

Committees are a tool that help your meetings run smoothly. There are two types, standing and special. Standing committees are the ones that perpetually exist such as finance or constitution and rules. Special committees are ones needed only occasionally or for one time events such as nominations, or a special project committee. Each committee should have a chairperson and records of committee meetings should be kept. The committee chairperson normally reports to the members and moves for acceptance of the report.

It is a good idea to have the following standing committees for your auxiliary: Finance, Human Relations, Constitution and Rules (may be two committees), Legislation and Political Action, and Membership (for recruiting members). In addition your auxiliary

should have at least one person to serve as liaison to the union and a liaison for Public Relations. The public relations liaison should send information about your auxiliary to the national Auxiliary editor for publication, send information to the local/state union newspaper editor for publication, write news releases for the local newspaper for noteworthy projects of the auxiliary, and encourage members to write letters to the editor when appropriate.

The president of your Auxiliary is an ex officio member (member by virtue of office) of all committees. Members may serve on more than one committee. The following are some good guidelines for committees:

Ways To Make Committees Work Effectively

- * Make sure the committee has a real purpose for existence and everyone knows that purpose. Don't hold meetings without a clear reason.
- * Don't have more than eight people on a committee.
- * Have the right people on the committee. Remove committee members who are not right for the committee or who don't participate.
- * Give advance notice of meetings, and whenever possible, distribute materials in advance.
- * Encourage everyone to participate during the meeting while discouraging members who monopolize the discussion. Utilize seating arrangements where everyone can interact.
- * Start and end meetings on time.
- * Use name tags if participants don't know each other.
- * Provide an agenda for each meeting. Schedule important items first on the agenda. Allocate time for discussion according to the importance of each issue.
- * Don't allow unrelated discussions during meetings.
- * Don't discuss, re-discuss, and continue to discuss items.
- * Double-check for agreement on important issues.
- * Be specific about tasks and deadlines.
- * Conclude each meeting with a summary of what is to be done by whom.
- * Allow some social time following each meeting.
- * Send members a summary of the meeting, keying on the decisions made and on the assignments given.
- * Make sure everyone gets credit for the accomplishments of the committee.



Establishing a Conducive Atmosphere

Another way to make meetings run smoothly is make members feel welcome and important. One way to do this is to include all members in business discussion. Some people are reserved and unlikely to offer their opinion unless asked. A good chairperson makes sure everyone is encouraged and has an opportunity to share their thoughts with the group. Most organizations accomplish this by following rules, by recognizing the accomplishments of members and by finding creative ways to overcome dissension.

A group's constitution is the primary governing document. Suggestions for writing a constitution can be found in the organizing section of this handbook. It is also desirable to follow parliamentary procedure or Robert's Rules of Order. The Auxiliary uses Robert's Rules of Order at most state conventions and all national conventions. Most locals use at

Conducive Meeting Atmosphere—Continued

least informal parliamentary procedure Most Auxiliary conventions also follow an additional set of rules as well. Confusing? It's not confusing if you learn step by step and understand the reasoning behind the rules.

Parliamentary Procedure

Parliamentary procedure is a set of customs and rules of conducting business in the English Parliament that were brought over with the colonists. In the USA they are the authority in Congress unless they are in conflict with existing rules or precedent. Henry Martin Robert, a U.S. army general, modified parliamentary rules for use by social groups and organizations and published a rule book in 1876, known as Robert's Rules of Order, which has since been frequently revised and updated. Rules of Order are comparable to manners and accomplish several things for an organization.

- ❖ Rules organize the meeting, only one question can be discussed at a time.
- ❖ Rules make the meeting democratic, the majority rules but the minority is given a fair hearing.
- ❖ Rules give the meeting decorum.
- ❖ Rules give the members the means to stop debate on a question so other items of business can be discussed.
- ❖ Rules give the members the means to reconsider something already voted on when further information becomes available.



Motions

Motions are the means to discuss and vote on business. It isn't necessary to make motions to hear reports from officers or committees, but motions to accept these reports are normally in order. To make a motion, a member should seek to be recognized by the president (or chairman) by raising a hand or going to a microphone. Then the member should address the chair by saying Madam or Mister President (or chairman) and wait to be recognized. When the President has recognized the member, the member states: "Madam/Mister President I move to...". Motions are recognized in order of precedence. There are three types of motions: privileged, incidental and subsidiary.

Privileged motions have the highest precedence. They have nothing to do with the pending motion or discussion, but are so important that they are allowed to interrupt the consideration of other questions and they may not be debated. There are only five (listed in order of precedence): fix a time to adjourn, adjourn, recess, question of privilege, call for orders of the day (or order of business). The three privileged motions most widely used within the auxiliary are adjourn (at the very end of convention or meeting), recess (for lunch or for the day) and question of privilege. The question of privilege is used most often to rectify a condition within the room.

To bring a question of privilege the member asks for recognition then states, "Madam/Mister President, point of personal privilege..." or "Madam/Mister President, I rise to a question of privilege..." Common uses at meetings are have the air conditioner turned down, have more lights turned on, get the speakers to speak louder, inform the body that a member is ill and ask for assistance.

Incidental motions are those which arise out of a pending question. They have no rank among themselves but yield to privileged motions. Most of them may not be debated.

INCIDENTAL MOTIONS

- ❖ Appeal the decision of the Chair: say "I appeal from the decision of the chair." it must be seconded and voted on by the members.
- ❖ Division of the Assembly: a request that members stand or raise hands so votes may be counted. Say "I call for division." This motion must be voted on by the members before the count is taken.
- ❖ Division of a Question: To divide a question into parts so they may be voted on separately. Say, "I call for division of the question..."
- ❖ Filling Blanks: Say, "I move that we fill in the blanks..."
- ❖ Objection to consideration of the question: used to prevent bringing up a question because it is without merit or goes against the purpose of the body. It requires a two thirds vote. Say, "I object to consideration of the question."
- ❖ Parliamentary inquiry: To ask the chair for parliamentary information.
- ❖ Point of Information: Used to add information to the question. Say, "Madam/Mister President, Point of Information..."
- ❖ Point of Order: Used to point out that a motion is out of order either by precedence, by not following the rules of the body, or by not being taken up at the proper time. Say, "Madam/Mister President, Point of Order..."
- ❖ Read Papers: A request that supplementary information be read.
- ❖ Suspend the Rules: Used to modify the rules of the assembly, and requires a two thirds majority. A common usage is to suspend the rules to allow discussion to take place after a time agreed upon for recess. Say, "Madam/Mister President, I move to suspend the rules."
- ❖ Withdraw a motion: Used by the maker of the motion to withdraw it. The second must also withdraw the second. Say, "Madam/Mister President, I withdraw the motion."

Parliamentary Procedure—Continued

Subsidiary motions are the most frequently used. Their purpose is to modify or suppress the main motion. They have precedence over the main motion but may be interrupted by privileged or incidental motions. There are seven and they are listed here in order of precedence:

SUBSIDIARY MOTIONS

- ❖ Lay on the table: used to suppress the question when there is no possibility of obtaining a majority on the question. The only way the question can be brought back up is to vote to remove it from the table. Say, "I move that this motion be tabled." or "I move to lay the question on the table." It can't be debated.
- ❖ The Previous Question: Used to cut off debate. It requires a two thirds majority and may not be debated. Say, "I call for the Previous Question."
- ❖ Limit or Extend Debate: Used to limit the time speakers may speak on a question, limit the length of time allotted for debate on the question or to extend previously agreed upon rules of debate. Say, "I move we limit/extend debate..."
- ❖ Postpone to a definite time: used to postpone debate. Say, "I move we postpone debate until..."
- ❖ Refer to Committee: Used to send a motion back to committee when the motion requires so much amending that it would waste the time of the members to continue debate.
- ❖ Amend the Amendment: Used to change an amendment by adding or removing words. An amendment to an amendment can't be amended. The body votes on the amendment to the amendment, then the amendment (as amended), then the main motion as amended. Say, "I move to amend the amendment..." It is debatable.
- ❖ Amendment: Used to change the main motion by adding/deleting words or substituting a motion on the same subject. Say, "I move to amend..." It's debatable. No more than two can be considered at one time. Substitute motions should be made if major changes are needed.
- ❖ Postpone indefinitely: Used to suppress debate. It is debatable.

The **main motion** before the body is subject to all the other motions as listed previously.

Miscellaneous Motions

Miscellaneous motions affect the main motion once action has been taken.

MISCELLANEOUS MOTIONS

- ❖ Remove from the Table: May not be debated. Say, "I move that (question) be removed from the table."
- ❖ Rescind or Repeal: To annul some action already taken when it is too late to reconsider it, i.e. at the following convention. It requires a two-thirds majority vote without notice to the members or a simple majority if all members have been notified of the intention to rescind.
- ❖ Reconsider: To bring an issue back up that has been previously voted on. It is debatable.
- ❖ Ratify: Used to authorize action already taken by officers during an emergency or at a meeting where there was no quorum. It's debatable.



Raise Hand or Stand (division)



Ballot (voting strength applies)

Roll Call (voting strength applies)

General Consent (Chair: If there are no objections...)

Interrupting the Speaker

The following motions can interrupt a speaker: call for orders of the day, point of order, question of privilege, and question of quorum.

Methods of Voting: Viva Voce (by voice--aye and nay)

Tie Votes

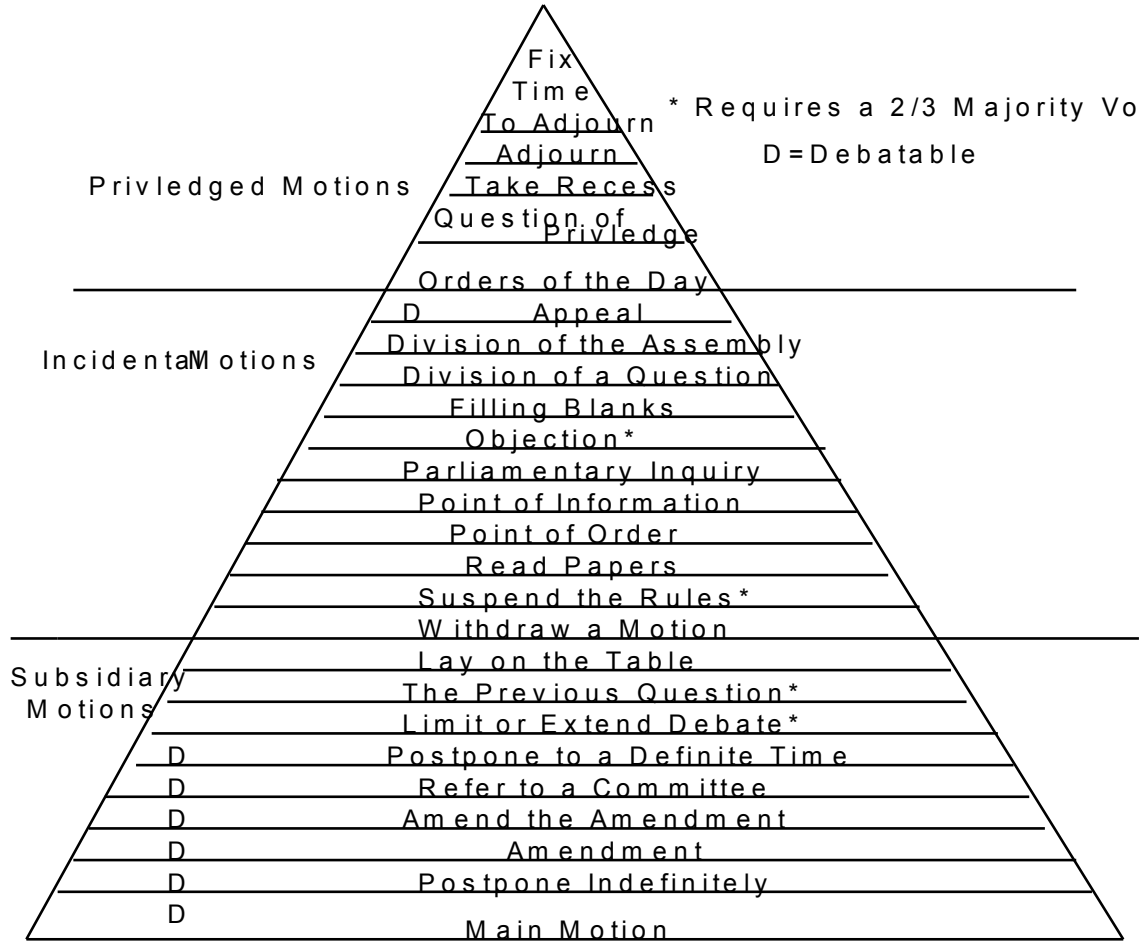
Tie votes defeat the motion unless the tie is broken by the chair. The chairperson is permitted to vote only when the chairperson's vote would make a difference, i.e. to break a tie or cause a tie that defeats the motion.

Workshops are also offered on this subject by national officers.

The Following diagram, taken from Robert's Rules of Order, may assist you in understanding the different motions

**Diagram Of Parliamentary Motions
In Order Of Precedence**

(Except for Incidental Motions which have no rank among themselves.)



MISCELLANEOUS MOTIONS:

- Take From the Table (Undebatable)
- Rescind or Repeal (Debatable & Requires 2/3 vote with notice)
- Reconsider (Debatable)
- Ratify (Debatable)

Recognizing Members

Another way to make members feel welcome and important is to recognize individuals for their accomplishments. Here are some ideas for recognitions:

- Put an article about the member in the local newspaper,
- APWU and Auxiliary newsletters, or labor press.
- Send handwritten holiday notes to people.
- Offer "Member of the Month" Awards.
- Keep track of birthdays and recognize them.
- Invite skilled volunteers to train members/officers.
- Involve members in the long-range planning for your organization.

- Offer members a chance to attend all seminars, training sessions, meetings and conventions.
- Hold a social event where members bring a guest who helped with a project during the year.
- Create a bulletin board that features pictures and accomplishments of members.
- Send thank you notes to members for participation in group projects, especially those not often involved.
- Acquire special discount coupons from local merchants to give as a gift in recognition of accomplishment.

OVERCOMING DISSENSION

Dissension within a group is not uncommon. People are different in many ways so it's not surprising that they have different views on how to approach projects and problems.

The first step to overcoming dissension is to listen to the person you disagree with. *Really listen*. The following checklist may help you overcome listening problems.*



Overcoming Listening Problems

- I have always thought of listening as an automatic process, not a learned behavior that I could improve.
- When I find a topic uninteresting, I stop listening and begin thinking about something else.
- I feel so strongly about some issues that it is hard for me to listen to speeches about them.
- Certain words trigger extreme responses in me.
- I am easily distracted by noises when someone is speaking.
- I don't like to listen to speakers unless they are experts.
- Some people are so objectionable that I don't want to listen to them.
- I get sleepy when someone talks in a monotone.
- I can be so dazzled by an impressive presentation that I don't really listen to what the speaker says.
- I don't like to listen to speeches that contradict my values.
- When I disagree with a speaker, I spend my time thinking up counterarguments rather than really listening.
- I know so much about some topics that I can't learn anything else from a speaker.
- I believe the speaker is mainly responsible for effective communication.
- I often have so much on my mind that I find it hard to listen to others.
- I sometimes stop listening when the subject is difficult.
- I can look as though I'm listening even when I'm not.
- I listen only for the facts and ignore the rest of a message.
- I try to write down everything a lecturer says.
- I let a speaker's appearance determine how well I listen.
- I often jump to conclusions and put words in a speaker's mouth.

**Taken from a speech course at Nebraska Wesleyan University. Text: Public Speaking, 3rd Edition - by Osborn/Osborn, Published by Houghton Mifflin Co.*



*Down to your
last nerve?*

MORE WAYS TO DEAL WITH DIFFICULT PEOPLE

When listening and carefully responding to another member doesn't clear up a problem, other tactics may be in order. The following suggestions may help you:

- ☞ Clarify what the problem is and know what the problem is not.
- ☞ Find common areas of agreement; search out common goals.
- ☞ Is your problem person a listener or a reader first?
- ☞ Discover which approach is most effective.
- ☞ Use simple wording to explain your position. Avoid excess verbiage.
- ☞ Speak to your difficult person during the best time of day or week.
- ☞ Put facts in writing.
- ☞ Keep attitude positive. Rehearse positive interaction before a meeting. Recall positive results.
- ☞ Keep conversations focused on issues, not personalities.
- ☞ Clarify what you want and what you need. Distinguish between the two.
- ☞ Watch out for any old attitudes that are interfering with your current effort.
- ☞ Make sure both body and verbal languages are in agreement.
- ☞ Don't allow yourself to get "hooked" into irrelevant arguments.
- ☞ Speak in private if a difficult issue must be addressed.
- ☞ If a person is abusing your time, deal with it directly by explaining that you need to do your work most efficiently.
- ☞ More ways to deal with Difficult People, Continued
- ☞ Follow up in writing with summary of discussions and assignments.
- ☞ Don't take their dislikes personally.
- ☞ Make friends with their friends.
- ☞ Don't discuss them with other people. The walls have both ears and mouths.
- ☞ Set a limit on what you will put up with and stick with it.
- ☞ Remember that you are not God. Winning may only mean arranging a tolerable working relationship, not solving all their personality defects.
- ☞ Treat them nice anyway. It may make them like you or it will, at worst, simply confuse them.

Resources Used in Preparation of this Chapter

101 Ideas For Volunteer Programs, Steve McCurley and Sue Vineyard, copyright 1986, Heritage Arts Publishing, 1807 Prairie Avenue, Downers Grove, IL 60515.

Robert's Rules of Order, 1983 Edition, Jove Publications, Copyright 1967, The Berkeley Publishing Group, 200 Madison Ave., New York, NY 10016

Toward a Human Society: Images of Potentiality, Robert S. Fox, copyright 1973, Washington, DC: N.T.L. Learning Resources Corporation. Positive, optimistic approach to establishing and achieving goals with membership group participation. Six approaches are presented to meet the needs of various groups.

Criteria of Effective Goal-setting: The Spiro Model, John E. Jones, copyright 1972, AHGF, pp 133-34, Specificity, Performance Involvement, Realism, and Observation are proposed as criteria for judging goal statements.

Common Problems of Volunteer Groups, Ed Bancroft, copyright 1975, AHGF, pp. 111-114. Discussion of the critical problem of having too many goals and a workshop design about better planning.

Developing and Managing Open Organizations, Oscar G. and Barbara D. Mink and James M. Shultz, copyright 1979, Austin, TX Learning Concepts, pp 117-130. Organization goals, effective goal setting, periodic reviews, membership involvement.

Management by Objectives, Thomas M. Thomson, copyright 1972, AHGF, pp 130-132. Stresses need for member involvement in the process of setting goals to gain commitment and quality results. Notes importance of evaluating results and changing goals accordingly.

Public Speaking, 3rd Edition - by Osborn/Osborn, Published by Houghton Mifflin Co.

Assisting the Union

**Human
Relations**

Legislation



**Political
Action**

**Public
Relations**

Chapter 5

Auxiliary

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Assisting The Union

Assisting the Union



Although each objective of the Auxiliary is interlocking, perhaps the primary function of the Auxiliary is to assist the American Postal Workers Union. All other objectives are a natural result of assisting the union and flow naturally from this core objective.

There are many ways the Auxiliary assists the union. Some Auxiliary members volunteer time and services in union offices. Members may answer phones, type up grievances, enter data into computers, and assist with general office work and maintenance. Some Auxiliary members assist with editing and production of union newspapers and participate in Postal Press Association functions. Auxiliary members help with union human relations projects and state/local social functions and meetings.

The Auxiliary promotes labor education and informs our members and the public on the history of the labor movement. The Auxiliary promotes purchasing products that are union made whenever available, and when union products aren't available the Auxiliary promotes purchasing items made in the U.S.A. This philosophy also extends to the service sector where many workers are union members. The Auxiliary adopts the legislative program of the APWU, lobbying for passage of legislation the APWU Legislative Department has endorsed. Auxiliary members work for election campaigns of candidates endorsed by the APWU.

The Auxiliary supports the APWU Health Plan, the Accident Benefit Association and Voluntary Benefits Plan, by distributing information to Auxiliary and APWU members and assisting at health fairs.

Auxiliary members do not participate in union politics unless an election involves an immediate family member. Auxiliary members do not take controversial stands on issues that aren't sanctioned by the APWU.

Wherever an APWU organization exists, an Auxiliary member could help with any office work, program or function that the APWU is involved in. It is in the union's best interest to organize and encourage the state and local Auxiliary to maximize the participation of the whole family in the American Postal Workers Union!

Labor Education - Preparing our Auxiliary Family for the Future

If our children are our future, then it is up to us to educate them on the past. That is exactly the reason behind the Auxiliary's Labor Education Program. Based on a curriculum received from several school systems, including Minneapolis and St. Paul, MN., this program attempts to bridge the gap of past, present, and future.

Aside from the school curriculum the Auxiliary uses sources from "Labor Heritage" magazine and various encyclopedias to communicate these efforts of our labor forefathers to our membership. The column "**A little bit of Labor Ed**", a regular feature of the Auxiliary *News and Views*, details topics of labor struggles both past and present. Some issues deal with the abuses of child labor and how that brought about public education. Others deal with legislation such as NAFTA and GATT and their effects on today's work force. But the most important lesson here is education on the history of organized labor.

Labor Education ties into every facet of Auxiliary activity. Whether your interest is legislation or human relation you can always find a tie to the labor organizations of the United States. A union is defined as a merger or joining of persons or things for a common goal. Marriage is a union. Family is a union. Our churches are unions. Our United States of America is a union of 50 states. Union means working together and cooperation; "United we stand - Divided we fall."

As part of our continuing commitment, the Auxiliary piloted a **Labor Education for Kids** program at the 1994 National Convention. Several National Auxiliary officers have presented all or parts of this program to state conventions. Why do we reflect on the past? Just look around. More and more companies want a part time work force with few if any benefits. They want a lower salary, no medical insurance, no vacation plan and so on. It looks like a revival of the early 1900's. Children have the strongest sense of right and wrong and labor education reinforces that sense.

How Can Local Auxiliaries or State Auxiliaries promote Labor Education



- * Present a Labor Ed for Kids workshop for your local APWU kids.
- * Provide a Labor Magazine, such as Labor Heritage to a Middle School or High School in your community - the cost \$24. per year.
- * Rent or borrow video tapes on labor history. A recent Disney film, "Newsies" recounts the strife of a big city newspaper delivery group being exploited by the owner of the paper. It's a musical, it's enjoyable and it's educational.
- * Contact your state or local AFL-CIO and request information on video tapes about labor education.
- * Lobby your state legislature for a law requiring the addition of labor education to the curriculum. Multi-cultural education was added after years of hard work. This same dedication may enable our youth to know the entire story of the "rise of the American Business".
- * When your child does a research paper for school, encourage them to use a labor topic. "Child Labor - then and now", or "Mother Jones - a real Mother's Day Story" would enlighten and delight an entire classroom.
- * Lobby your local school district to adopt a labor friendly curriculum.
- * Put a crossword puzzle, quiz, or word search in your local paper on the topic of labor education.
- * Visit your local library and provide your family with some reading material on the history of organized labor.

Tips For Organizing A Social Event

Sometimes the Auxiliary may be asked to organize a holiday party, installation, banquet or other social event. A special committee should be organized to lay the foundation for a social event. When establishing this committee you may wish to consult the section on committees within the chapter on meetings in this handbook

First choose a date and location. Sometimes availability of facilities will dictate the possible dates for the event. When choosing a date the committee should also take maximizing attendance into account. For example, an event planned on an evening of a major sporting event or on a holiday when members are out of town will result in poor attendance. The color of a special day or a special occasion will add a certain touch to make for a special event. An example: the installation of officers can be the occasion for a Presidents tea or the Christmas holidays can be a time for extravagant lively parties along with seasonal music.

Committee members may wish to divide up planning tasks. A social chairperson may have charge of the menu, invitations and decorations. A program chairperson arranges toasts, roasts, speeches, and in most instances the music.

In planning a menu, unless the theme is an exotic one requiring exotic dishes, stick to tried and proven menus. If the committee will provide the food make plans with care. Estimate the cost of each item and plan a budget. Decide who will shop for food items and who will prepare food. Consider comfort, interest, quality of food, price range and ease of service then choose arrangements that will make a successful occasion. Consider catering and investigate the cost.

Some organizations enjoy pot luck meals. This type of function requires careful planning so no one person or family carries a greater expense or burden than the other participants. Arrange refreshments so that unexpected guests are provided for. Plan an activity each year with families. A picnic is perfect, but as with all pot lucks, food should be assigned or you could end up with a dozen bowls of potato salad and no lemonade!

Room and/or table decorations should be artistic yet unobtrusive. Nothing is more aggravating than to have interesting dinner guests at your table and be unable to see them because of the table decorations. Ventilation and lighting should be considered and someone from the committee should see to everyone's comfort. The committee should inquire about the need for a head table and /or podium and microphone.

At any dinner the President should preside. If using a head table, the presiding officer is seated at the center of the table with the most honored guest seated at the right. If a mistress or master of ceremonies is present he/she sits to the right with the honored guest between them. If a head table isn't used, seat the presiding officer and honored guests near the microphone or podium. Consider using place cards to avoid confusion.

Membership teas are acquaintance builders. Teas can be informal or formal depending on the preferences of your members. New member prospects may be more comfortable in an informal setting where less is required to participate.

The social committee chairperson is the official host or hostess, making sure everyone is comfortable and that new members and guests are made welcome. The President is often quite willing to assist with these duties. Please use the same tact and grace that you would use in your own home.

Setting Up A Meeting Registration

Registration is an important part of conventions and meetings. Registration allows the Union and/or Auxiliary the means to keep track of those in attendance as well as how to best plan for the occasion. In some instances one may register by letter or by returning a registration form to the registration or convention committee by a certain date. Registration for district meetings, local meetings, and other general meetings usually differ from convention registration. For information specific to convention registration, please see *Hosting and Planning A State Convention* in Chapter 6 of this Handbook.

If you are fortunate enough to be assigned to assist with the registration table, find out exactly what will be expected of you. When will the table be open for business on each day of the meeting? When will the Auxiliary be expected to work? How many people will be needed to man the table? Where will the registration be set up? Will there be signs posted to help people find the registration table? What equipment will be needed? Are electrical outlets conveniently located? Who will set up the table and how will it be set up? Will there be any advance preparations such as name tags or meeting bags that you will need to help with? If registration runs through meal time, will meals be provided for the staff or will relief workers be planned? Will there be any registration fees, and if so will there be any cost to the Auxiliary? Many other questions will no doubt come to mind as you plan registration.

You will probably be asked to distribute name tags for most meeting registrations. Name tags may be prepared in advance, typed at the table, entered into a computer and printed, or simply handwritten. Normally, some type of attendance is also taken at the registration table. A simple way to take attendance is to have everyone sign in. It is a good idea to take addresses and phone numbers, as well as names of those attending.

Some meetings have registration fees. Fees are determined either by the local hosting the meeting or by the state organization. Registration fees usually cover costs of the meeting and may include workshop materials, meals, hospitality and entertainment depending on planned activities. If you will be collecting registration fees you will need a cash box with change, a receipt book and pens, and a calculator. Find out in advance how checks are to be made out. Anyone paying cash **must** be given a receipt. Make sure that you have planned for obtaining more change if needed. You may also need meal tickets if meals are planned for a large gathering.

If the meeting will be large, enlist the assistance of the Chamber of Commerce. They may be helpful in providing meeting bags, maps of your community, and name tags. They may also provide equipment for your registration table.

Good planning is the key to smooth registration operations. Time invested in preparations will pay huge dividends on registration day, freeing you to proceed confidently and without stress. We wish you success!

How to Run a Successful Health Fair

Many Postal and Federal facilities offer their employees informational Health Fairs prior to or during the Federal Employees Health Benefits Program (FEHBP) Open Season enrollment period. Open Season is an annual open enrollment period when affected employees may begin FEHBP coverage or change plans. Open Season generally runs from mid-November to mid-December. Open Season health fairs give employees a chance to receive information regarding various plans in the FEHBP. Federal Brochures, informational pamphlets and flyers and benefits summary charts are available from the health plans that are represented at these fairs.

The American Postal Workers Union Health Plan participates in a significant number of health fairs every year. Due to work commitments and budgetary restraints, Health Plan employees are, for the most part, limited to health fairs in the Washington DC area. The Plan encourages Health Plan Representatives (HPRs), State and Local officers and Auxiliary members to participate in fairs nationwide. The Health Plan supports these efforts by coordinating personnel with fairs and sending necessary supplies to volunteers.

As a member of the APWU Auxiliary, you are encouraged to "sell" the Plan all year long, but especially during the Open Season period. With the support of the Health Plan, it is a fairly easy thing to do.

How do I get started?

Determine if the Postal or Federal installations in your area are planning to sponsor Open Season fairs. You can call the Marketing Programs Coordinator, Maurice Glover at (410) 424-1567 during normal business hours to see if the Health Plan has information on fairs. The Plan may have already sent information to Health Plan Representatives or Officers in your area. If so, you will be directed to contact the person who already has the information.

Coordinate your health fair participation with State and/or Local APWU officers. If there is a Health Plan Representative in that area, contact the HPR to ensure that efforts are not being duplicated. Often times with Postal facilities, there will be separate fairs for all shifts. With your help, all fairs may be covered.

If the Health Plan is unaware of fairs in your area, you may try to determine if Postal or Federal facilities in your area are planning to hold a fair. To do so, call the Post Office and ask to speak to the Postmaster or the Officer-In-Charge. If you call a Federal Office, ask to speak to the Health Benefits Officer (HBO). If the office has no HBO, ask to speak to someone in the Personnel Office and request the name of the person responsible for coordinating the Health Benefits Program. After receiving information you must call Maurice Glover to get approval to attend. If the health fair is not approved, you will not be reimbursed by the Plan for parking, tolls, etc.

When facilities in your area are not having health fairs, you may try to initiate some type of marketing action on behalf of the APWU Health Plan. Contact the facilities and ask permission, from either the Postmaster or the Health Benefits Officer, to visit and distribute materials regarding the Health Plan. Do not simply show up at Postal or Federal facilities and expect to distribute information or hold an impromptu health fair. Facilities will usually not allow this. If you are allowed to set up in a swing room or cafeteria, do not go out on the work floor without explicit permission from the person in charge. Often times, work areas are off limits to non-employees.

What do I do once I'm at the Health Fair?

If a health fair is planned at a Postal or Federal installation, here are some tips to help you make it a successful fair. Try to arrive at the health fair early. Often times, tables are not assigned, so the earlier that you arrive the better chance you have of getting a more visible

Continued—Health Fairs and the APWU Health Plan

table (e.g. by the main entrance to the room). Once there, introduce yourself to the person(s) running the health fair and answer any questions that they may have.

When you get your table, set it up. To help identify the Health Plan, use a table sign or poster if you can. Place literature and the "giveaways" on the table in an attractive way--do not just scatter your goods across the table.

The more aware that you are of the Health Plan's benefits, the better you will be able to sell the Plan. For example, if you are talking to a younger person, you obviously will not want to dwell on the Health Plan's benefits for members with Medicare. Likewise, if you are talking to an older person, they will not find the Plan's Well Child Benefit to be of interest. Below is a list of Do's & Don't for a health fair.

Do	Don't
Do be cheerful and friendly--By doing this you become "approachable".	Don't dress sloppily--first impressions are important.
Do be attentive to questions--make certain you understand the inquirer's questions.	Don't interrupt or refuse to answer discourteous questions.
Do be diplomatic.	
Do answer questions as honestly and as thoroughly as possible.	Don't try to answer questions if you aren't sure of the answer--give the Plan's toll-free number.
Do speak loudly and clearly.	Don't mumble or speak too softly or too fast.
Do be courteous at all times.	Don't criticize other FEHB Plans.
Do know the premiums and basic benefits.	Don't quote benefits of other plans.
Do become familiar enough with Plan materials (brochure, flyer, etc.) that you can readily find basic information.	Don't directly compare our premiums or benefits to those of other plans, even if you are asked to do so.
Do take the names and telephone numbers of current Plan members who have a problem Write down the problem and forward all of this to the Health Plan for them to take action.	Don't forget to give out information, including the Plan's Open Season Hotline number, to those who stop by.

In the plan's flyer, there is a Benefit Summary Chart that is very helpful. By following these simple "Do's and Don'ts" you can assure yourself a successful Health Fair!

WHAT SUPPLIES WILL I RECEIVE TO PROMOTE THE HEALTH PLAN

- A Few Federal Brochures
- Informational Sales Flyers
- "Give away" items

Continued—Health Fairs and the APWU Health Plan

Target the prospective member for what he or she may need. Ask questions of them. If you are speaking with a younger person, ask if he or she has children. If so, talk about Well Child and immunization benefits. If he or she has no children, discuss the Wellness benefit for low utilizes of benefits.

If you are in an area that has a large Preferred Provider Organization (PPO) network, discuss the advantages (low co-payments, higher payment rate, reduced costs through negotiated pricing arrangements) or choosing a PPO provider. If the person talks about prescription drugs, explain the Plan's prescription drug program options that save members money and include no paperwork for the member. The Plan has at least one benefit that is attractive to each person--often times, many attractive benefits.

*If your area has a preferred Provider network, the prospective member can visit our website at www.apwuhp.com to see if his/her provider is in the network.

Why should I promote the APWU Health Plan?

The Health Plan does not have the luxury of a large Open Season budget like many of the FEHBP carriers do. They do not saturate the television and radio airwaves with commercials. What the Plan does is rely on its employees and associates (Officers, Health Plan Representatives, and Auxiliary members) to help sell the Plan throughout the year, but especially during Open Season.

The bigger the Health Plan becomes the better and stronger it becomes. With a larger membership, the Health Plan can exert more influence on its own benefits and premiums. With a larger population, the Health Plan can have a bigger Preferred Provider network. As the Health Plan grows, it becomes a better organizing tool for the American Postal Workers Union, and by extension, the Auxiliary. Premiums paid to the APWU Health Plan stay within the APWU and its membership. The premiums do not go to other unions or worse yet, non-union plans. **The APWU Health Plan is staffed by union employees.** How many other health plans in the Federal Employees Health Benefits Program can make that boast?

Promoting Union Made and Made in U.S.A. Products

One way Auxiliary members can assist the union is by demonstrating support for American labor. A tangible way to preserve our union jobs is by purchasing those products and frequenting those establishments that hire union workers. We can look for the union label when we shop, and we can find out what services are offered by union workers not just in our town, but also when we travel. When union made products and services aren't available, we can purchase products made in the U.S.A. and services offered by Americans. Not only can we form these habits for ourselves, but we can also encourage other people to do the same. Remember, the American job we preserve today may be an opportunity for our children tomorrow!

Postal Press Association

Many Auxiliary members actively assist with publication of APWU Local and State newspapers. Some of these Auxiliary members, as well as the National Auxiliary Executive Board, are Associate members of the Postal Press Association (PPA). The PPA is an organization formed by and for APWU newspaper editors and their assistants. The PPA offers workshops, critiques, and publication suggestions and ideas. The PPA helps editors stay within publishing laws and teaches members how to avoid legal problems. The PPA also publishes refresher tips for good journalism grammar. Auxiliary members participate in the PPA Conference and promote the PPA within the Auxiliary and the Union.



Accident Benefit Association

The Accident Benefit Association, a department of the APWU, is an accidental insurance plan that is self funding and operated by and for APWU members. Its operations **are not for profit**. All members of the APWU employed in the U.S. Postal Service and the APWU members' **spouse** are eligible to file an Application for membership. Auxiliary members may be asked to help distribute information about the Accident Benefit Association (ABA) from time to time. Many Auxiliary members are also members of the ABA, and the Auxiliary firmly supports this important organization.

Voluntary Benefits Plan

Services offered under the Voluntary Benefits Plan are Assistance Plan.

- The APWU Mastercard
- Legal Services
- Short Term Disability Income Protection Plan
- Long Term Disability Income Protection Plan
- Supplemental Hospital Cash
- Basic Care Insurance
- LiveStrong Cancer Insurance
- Term Life Insurance
- Group Dental Coverage
- Accidental Death and Dismemberment Plan
- Mortgage Coverage
- MetLife Home and Auto
- The Member Assistance Plan

HUMAN RELATIONS

**Human
Relations**



Human relations is caring, reaching out, involvement. Human relations is a fundamental founding principle of the Auxiliary. The very word auxiliary is defined by Webster as "providing help or assistance. Prior to the merger of 1971, there were five different postal unions and five different Auxiliaries. Each of them had a constitution. After 1971, these five unions – and these five auxiliaries merged to form the American Postal Workers Union and Auxiliary. History—clear back to 1917 details Auxiliary members involvement in human relations projects. In fact these founding organizations were all organized because of low pay, poor morale, and poor working conditions, both within the post office and society in general. Our objective has always been better working conditions, a higher standard of living for all workers, social and economic advancement, social welfare and the promotion of harmony and cooperation among people.

Auxiliary members believe each individual has certain needs and that people differ in what they consider important. We accept human dignity and adhere to the idea that each person must be treated with respect. An important feature of the Auxiliary constitution is the *Members Bill of Rights* which outlines these principles. We understand that people are interrelated, that no one lives in a vacuum, that what one person does usually affects someone else.

Auxiliary human relations projects often contribute to an important piece of basic subsistence for some families. It is extremely rewarding work, often measured in warm feelings and smiles, though the rewards can sometimes be monetary. A bonus for the Auxiliary occurs when these projects lead to positive public images of postal union families.

Human relations may lead to education. The Auxiliary not only supports formal education, but also pursues informal sharing of information that expands our understanding of safety and health issues, positive conflict resolution, and other matters that affect families.

The Auxiliary is involved in human relations in three main areas: assisting the union, aiding the family, and reaching out to the community.

- ❑ **Assisting the Union:** Help with local meetings, answer phone at the union office, help put out newsletter, serve a retirees dinner, (Also see Assisting The Union section of this handbook).
- ❑ **Aiding the Family:** Friendship, workshops on safety and health, lobbying for legislation that improves family life, scholarships.
- ❑ **Reaching Out:** Community service in the name of the auxiliary, food drives, taking part in school programs, blood donor drives, fund raising drives, etc. for foundations. The list of these programs is as wide as your interests.

❖Patrick J. & Marcella Sally Nilan Memorial Scholarship❖

Auxiliary members believe that education is the key instrument for opening the door of opportunity, enabling people to advance, and enriching lifestyles. Education helps people develop skills necessary to improve oneself in today's world. Acting on this belief, the planning and ideas committee at the National Auxiliary Convention in 1988 advanced a proposal that the National Auxiliary award a scholarship to adults wishing to continue their education or update their work skills. The first scholarship was awarded at the Auxiliary National Convention in Las Vegas, NV, in August 1990.

Today many families are encountering situations that require both spouses to work in order to provide necessary income. For many people, this need often demands additional training, which is not within their family's financial budget. The Auxiliary is very proud to provide assistance to those persons by means of our National Auxiliary Patrick J. & Marcella "Sally" Nilan Memorial Scholarship.

To be eligible for this scholarship an Auxiliary member must have held membership for at least one year prior to scholarship application. National Auxiliary Executive Board members and their immediate family are not eligible.

The PATRICK J. & MARCELLA "SALLY" NILAN MEMORIAL SCHOLARSHIP has been funded through the National Auxiliary "Book of Memories" establishing a living memorial to deceased Auxiliary family members. It is also supported by donations from State and Local Auxiliaries and other donations. The National Auxiliary intends to continue awarding scholarships as long as there is a need.

PATRICK J. & SALLY NILAN SCHOLARSHIP RECIPIENTS

- 1990 -- Ruby McGartland, Quincy, IL
- 1991 -- Jennifer Thomas Marks, Aberdeen, SD
- 1992 -- Delores E. Smith, Gainesville, GA
- 1993 -- Michelle A. Willard – Florissant, MO
- 1994 -- Not Awarded
- 1995 -- Judith Neff, Phoenix, AZ
- 1996 -- J. Mark Kirkwood, Provo, UT
- 1997 -- Edna Burt – Casper, WY
- 1998 -- Terri L. Major - Auburn WA
- 1999 -- Amy Lovell, Bumpus Mills TN
- 2000 -- Jason Hendrickson, Twin Falls, ID
- 2001 -- Yolanda Vidal–San Antonio TX
- 2002 -- Theodora (Erica) Mitchell–Sutton NE
- 2003 -- Kim Merow–Springfield OR
- 2004 -- Melinda Lowry–Mansfield OH
- 2005 -- Jenna Wong, Daly City, CA
- 2006 -- Jenna Wong, Daly City, CA
- 2007 -- Joan Anderson Mertz, Lincoln, NE
- 2008 – Letty Reyna–McAllen, TX
- 2009 – Christy Lutz – Portland, OR
- 2010 – Charlie Cash – Salt Lake City, UT
- 2011 – William Martin – Portland, OR
- 2012 – William Martin – Portland, OR
- 2013 – Leslie Carney – Tucson, AZ

The ACES Scholarship name was changed by a vote of the delegates at the 2000 national convention to honor Patrick J. and Marcella Sally Nilan and their support of the Auxiliary. The Priority One Scholarship changed its name to ACES at their 1995 Executive Board Meeting in San Antonio, TX. ACES is an acronym for Adult Continuing Education Scholarship.

Two Can Do



**Help Fight Hunger — It's only the beginning of opportunities.
See a need—Who can Do?
You Can Do —
It's the Auxiliary's Two Can Do**

This project helps feed and give comfort to the low income and homeless people of our country. There are too many people without shelter or enough food. As our government cuts back on entitlements and assistance, the need becomes greater. The National, State and Local Auxiliaries, as well as APWU organizations across America are collecting food, non-perishable items and money to help assist those community members with the greatest need. A variety of fund raising ideas are listed in the

fund raising section of this handbook to help auxiliaries raise money for this program. Many poems, songs and jingles have been written to advertise the project, copies are available from the National Auxiliary Human Relations Committee Advisor.

But Two Can Do goes far beyond feeding the hungry – it's about identifying a need, setting up a way to address the need, engaging your organization in the projects, and making a contribution through time, effort and sacrifice. All across the nation Auxiliary organizations are involved with projects that provide warmth through coats, hats, scarves and gloves; they are doing “baby showers” for birth crisis centers; volunteering in disaster relief, providing for our deployed troops, working in Veterans centers. The need is great. The opportunities are endless. The satisfaction of helping others in need – PRICELESS.

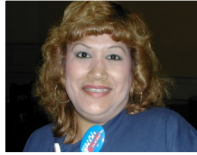
Who should be involved?

Participation in this project is on all levels of the Auxiliary. Ideally, each state and local should have a human relations officer.

The state Auxiliary HR officer should be responsible for organizing and publicizing projects on the state level for state conventions and publicizing projects for the national convention within the state. State project procedure: secure state union support for your project, contact convention host local to determine which community organization will benefit from the project, work with host local to make contact with that organization, publicize the project, arrange community publicity (newspaper, radio, TV ads), contact state union president to arrange a presentation ceremony during the convention, make arrangements for display and storage of collected items at the convention, arrange for a guest speaker from the organization to attend presentation at convention, and arrange for someone to take photos of presentation. For national convention projects, the state human relations officer should work with other state officers to ensure state participation at the national convention. The state officer should contact all local auxiliaries and members-at-large within the state and encourage their participation in the national project.

Local Auxiliaries and MALs are encouraged by the National Auxiliary to participate on their local and/or state level and at the National Convention. The local HR officer should follow a procedure similar to the state officer for local projects. The HR officer should contact the local union officers for support and assistance for a more successful project.

Auxiliary to the APWU— Reference Guide
Members Past and Present



Books for Young Readers

All over this country there are youngsters who want to learn to read. They need our help. Too many young children do not have access to good children's books. Some don't have people who will take time to read to them and encourage them to read themselves. There are two ways Auxiliary members can help alleviate this problem. One way is to collect new and used children's books and donate them to organizations such as public day care centers, head start, or other organizations that work with children from disadvantaged backgrounds. Books may be collected from Auxiliary members, Union members, friends and family. Libraries and the Salvation Army may also donate books for an Auxiliary sponsored book collection drive. These collection drives can be on the local or state level. The National Auxiliary also sponsors a book collection at the National Convention, and members are encouraged to bring books to the convention.



Another way that Auxiliary members can participate in the fight for literacy is by volunteering time to work with young people. Many community organizations that promote literacy are in desperate need of adult volunteers to work with children. Check with social organizations in your area for volunteer opportunities.

BOOKS WILL FEED OUR YOUNG MINDS TODAY AND TOMORROW!

Share A Bear

"Want to Give Them a Bear Hug? Share a Bear"

Imagine yourself as a young child, alone, on your way to the hospital or to a shelter for abused women and children. Often separated from other family members, in unfamiliar surroundings, who or what is there to cling to and/or give comfort? When an emergency comes up, there is no time to grab a favorite toy or doll. But a nice-sized, huggable teddy bear brings a measure of security and warmth. It is something to hang on to in the uncertain days ahead; something a child can count on to be nearby at all times; and something that belongs to you. It is something to love.

As part of our Human Relations project the APWU Auxiliary would like to encourage each state organization to donate new stuffed teddy bears, or as we would like to refer to them, "Share Bears", which may be given out by social workers and police officers when and where needed. Please open your hearts, give generously, and encourage others to donate bears. If you can't be there to give someone a "bear hug", a "Share Bear" is the next best thing.

The National Auxiliary adopted the Share a Bear project at the 1998 National Convention. Since that time hundreds of teddy bears have been donated to shelters, crisis centers, hospitals and other areas of need all over this county. Local and state organizations have embraced this project as a way to bring joy and security to a child in a time of crisis.

At the 2000 National Convention the Vermont Teddy Bear company partnered with the National Auxiliary to provide "Made in the USA" bears for this project.

Share A Bear continues to be one of the favorite projects of many of our state and local organizations.



E. C. HALLBECK SCHOLARSHIP FUND

The E.C. Hallbeck Memorial Scholarship program is an American Postal Workers Union scholarship program for high school seniors. It was established in January 1969 and first awarded in 1970 as a living memorial and permanent tribute to E. C. "Roy" Hallbeck, President of the former United Federation of Postal Clerks, as a self-perpetuating financial base for significant educational assistance to children of union members. Beginning in 1995, The Hallbeck Scholarship program was expanded from five scholarships to ten, awarding two in each of five geographic areas.

The Auxiliary promotes and supports the Hallbeck Scholarship through fund raising projects, donations, and other activities. The Hallbeck Scholarship Fund also receives major support from the APWU MasterCard program. One-half of one percent of the amount charged on APWU MasterCards revert to the scholarship fund as well as a percentage from each MasterCard renewal.

Also under the umbrella of the Hallbeck Scholarship Fund is the John and Vella Hill Scholarship which is awarded to one student who plans to pursue an undergraduate degree in the field of labor studies and/or industrial relations. In addition, five or more vocational scholarships will assist students pursuing a post-high school education that will prepare them for a vocation or trade.

Other Nationally Supported Programs

The National Auxiliary also observes **Breast Cancer Awareness Month** (October) and **Blood Donor Month** (February). The National Auxiliary asks that all members promote participation in the **Juvenile Diabetes Foundation**, the **Leukemia Society**, and the **American Heart Association**. In addition, many locals assist the union with fund raising projects for **MD (Jerry's Kids)**, and the **March of Dimes**. Phone numbers are found by calling your local hospital.

The National Auxiliary encourages creative ideas such as: assembling survival kits (comb, toothpaste, toothbrush, deodorant, etc.) for crisis centers and shelters, delivering magazines to senior centers and nursing homes, and reading or other services for seniors.

**HELP SOMEONE TODAY,
YOU MAY NEED HELP TOMORROW!**

LEGISLATION AND LOBBYING



A very important objective of the Auxiliary is understanding legislation in the U.S. Congress that affects postal families and other labor families, then acting on the information to encourage members of Congress to take positions that favor working people. As Auxiliary members we want to secure passage of legislation that will bring Postal Workers better working conditions and a higher standard of living.

The main source of information about legislation affecting postal families is the APWU Legislative Department. Information from this Department is published in a variety of APWU publications including the APWU newspaper, *Postal Worker*, the APWU *News Service Bulletin*, the APWU *Voices in Politics*, and *Legislative and Political Action Education* booklets. This department shares information with the Auxiliary Legislative Aide/ Editor and information is published monthly in the Auxiliary newsletter, *News and Views*. Another source for information about Legislative issues affecting working people and unions is the AFL-CIO *Legislative Alert*. It is important that issues are discussed at Auxiliary meetings so all members are informed and understand the issues.

Surveys show that 90% of American adults have never written a letter to a Congressional Representative, yet letter writing is one of the most effective and persuasive forms of lobbying. Certainly letter writing is one of the easiest and least expensive methods of lobbying. Congress members are interested in what their constituents think. After all, those constituents are the voters in elections. 90% of Americans never write to a member of Congress. When a voter is concerned enough about an issue to take the time to write, it sends a message to Members of Congress. You let them know the importance of that issue to you and your family. What's more, there are probably many other voters who feel the same way. Letters may express congratulations to a legislator for a position that legislator has taken, request the legislator take a particular position, or express disapproval of a position taken.

Letter writing is just one form of lobbying. Other methods are discussed in this section of the handbook as well as the proper way to write a letter to a member of Congress. Exercise your freedom as an American citizen, let your legislators hear from YOU!

LOBBYING -

Making a personal contact with our Senators or Congressman.

Whether it is in Washington, D.C. or your hometown making a personal telephone call or visit to your Senators and Congressman is an important task. Follow these few simple guidelines,

- Make an appointment. If you are going to Washington D.C. you may need to talk to a scheduling secretary, be sure to ask for that person's name. Generally, Senators and Congressman have an aide assigned to postal and federal issues. Ask for that person's name and meet with them if your representative is not available.
- Prior to your meeting, send a letter detailing the reason for your visit, the issues you wish to discuss, and who you represent. Many times they will also want to know how many people are in your party. Also confirm the date and time in this letter.
- Arrive at your meeting on schedule.
- Be courteous and direct, and be **PREPARED**. Study your issue and be prepared to outline the issues to them. Ask them their response and encourage them to consider your concerns. Request a response in writing to follow up the meeting.
- Take notes and keep a log of the activity. Record the date, time, who accompanied you on the meeting, the issues discussed and the results of the meeting.

WRITING A LETTER TO CONGRESS

Many times the APWU Legislative Department as well as the Auxiliary Legislative Aide Editor will want a copy of this report



It is our responsibility to secure publicity and create sentiment for the APWU membership. Many times, legislation is introduced that may be either beneficial or detrimental to the APWU family and their standard of living. The Auxiliary Legislative Aide Editor and the APWU Legislative Department work together to keep the membership informed on these issues and what the outcome would be if they are enacted. Aside from rallying the support of our members and their families it is also important to seek the aid of influential individuals and organizations within our community. Urge them to communicate with their Senators and Representatives requesting them to support our position on the proposed bill, whether it is to vote for or against the issue. Every letter represents a potential vote to the Congressman. The more mail and/or communications received by their office, the more consideration given to the legislation.

Although the personal touch is best, any communication is better than no communication. Perhaps an individual in your local is skilled at writing letters and communicating issues - use these skills to generate as many letters as possible on the issues. Handwritten letters still get a great deal of attention, but the accessibility of the personal computer has strengthened the typed communications. Email and other forms of electronic communication have also become a very efficient and accepted forms of communication. Just remember, make it personal, make it direct and ask for a response.

Do write your Congressman and Senator. They are your employee, hired by you as a result of the previous election. As an employer, it is your responsibility to keep tabs on the issues and how they will affect you as individuals, as a union family, and as a community. In order for your Congressman to make informed decisions, it is your duty to give them your views on the issues.

DO'S AND DON'TS OF WRITING A LETTER TO CONGRESS

DO address the letters to "**HONORABLE**" and spell their name correctly, using correct initials.

*The Honorable John Doe
U.S. House of Representatives
Rm # House Office Bldg.
Washington, D.C. 20515*

*The Honorable John Doe
U.S. Senate
Rm # Senate Office Bldg.
Washington, D.C. 20510*

If the room number and office building is not readily available, you can address the envelopes to either the U.S. House of Representatives or U.S. Senate. Be sure to use the zips listed above.

DO make your letters brief without omitting necessary details.

DO state the subject of your letters in the first paragraph.

DO write legible (or type) on one side of the paper.

DO remember to sign your full name and complete address.

DO confine letters to a single subject.

DO request a response in writing.

DO be courteous. Abusive or demanding attitudes are in poor taste and very poor psychology.

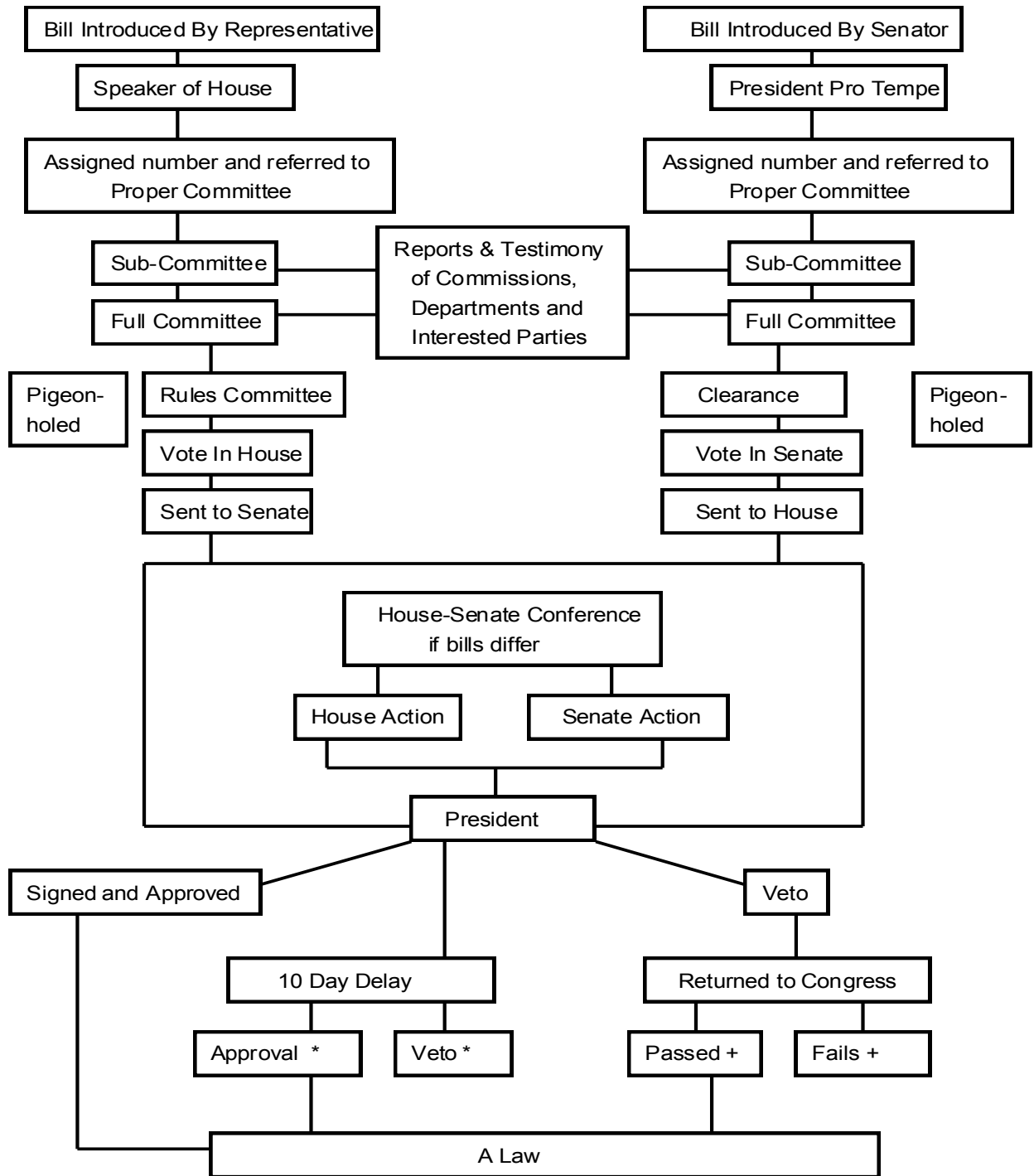
DON'T make a promise or threat of political support or reprisal.

DON'T make wild statements that are not susceptible to proof.

DON'T refer them to someone else for information about the subject of your letter. Give them the information yourself.

DON'T GIVE UP if you don't receive the answer you want. Remember - practice makes perfect - the more times your write the letters, the better they will be.

HOW A BILL BECOMES LAW



+ To Over-ride a veto, the bill must pass by a 2/3 vote in each House.

* If Congress is still in session, the bill is automatically approved. If not, the bill is automatically vetoed.

POLITICAL ACTION

Members of the Auxiliary to the American Postal Workers Union are encouraged to be politically active. The Auxiliary recognizes the importance of electing people who truly represent ordinary working people. It is not enough to write letters to legislators if those legislators are not receptive to the working person's point of view.



Auxiliary members are active in two main areas: fund raising for the APWU political action fund (APWU COPA) and direct involvement in political campaigns.

Auxiliary members must follow the APWU Strategy for COPA Fund Raising, which can be found in the fund raising section of this handbook. There are very strict laws governing fundraising for candidates and for PACs that must be adhered to. Any questions regarding these guidelines should be directed to a National Auxiliary officer.

Auxiliary members rely on APWU endorsements for guidance on which candidates to support. Our members may then become active in political campaigns in several ways on a grassroots level. A good place to get started is at the party headquarters for the candidate the member will be working for. There the Auxiliary member can meet the county campaign chairman and learn what help is needed.

The information in this section is intended to give you some ideas and guidance for successful participation in the political process. Remember, your participation is a basic freedom guaranteed by the Constitution of the United States. Help preserve that freedom by becoming politically active!

GETTING BACK TO GRASS ROOTS

Auxiliary Political Activities

Are you ready to get busy? The Hatch Act Reform Bill was enacted in 1993 and signed by President Bill Clinton. These revisions allow most federal and postal workers to again be active participants in the political process. What does this mean? The additional grassroots volunteers are a welcome sight to the auxiliary activists. Skeptics view this as the "death " of the auxiliary. Instead, it is the beginning of a shared family responsibility. This involvement will engage us in electing individuals who actually represent our causes. A refreshing change, but also one filled with awesome responsibility.

As a grass roots volunteer, you will be charged with a variety of activities. What work is too menial? None. By the way, don't expect to be paid. What can you offer? Well, as APWU & Auxiliary members you can provide invaluable service



**Political
Action**

Political Action—continued from page 72

needed by every political campaign. For example, you have knowledge of the operation of the USPS. Bulk Mail regulations seem tedious, but just a little bit of knowledge is valuable. The sortation, mailing statement and verification are just a part of the skills, your expertise in helping in all aspects of mailings is also needed.

Grassroots activities can also extend into these areas:

- * Walk for your health and canvass neighborhoods by placing fliers on doors.
- * Put up yard signs - and after elections help take them down.
- * Stuff envelopes, address envelopes, seal and stamp envelopes.
- * Volunteer to help at rallies, informational meetings, or host one in your home.
- * Do you like to talk? How about telephone polling - asking specific questions and recording the answers.
- * Computer skills can be used in the data collection field.
- * Organizational skills can be used in putting together notebooks, fact sheets, etc.
- * Volunteer for your Senator or Representative during their tenure in office.
- * Write letters, thank you notes, send cards etc.

These are some of the jobs to do, but if you think that someone will be knocking your door down, then you will be disappointed. How do you get your foot in the door? Make several phone calls to set up a time and meet the office staff for the prospective office you wish to work in. Later make a personal visit and request that they use your talents. Sometimes you may have to be a little persistent, but that's OK because the dividends are worth it. If at first you don't succeed, try, try again. It's just like getting something enacted into law. You must first start with baby steps and soon you will be leaping forward.

Above all, maintain all those things you did under the Hatch Act restrictions - such as lobbying, letter writing and telephone calls. Those activities are crucial to the enactment of any legislation.

APWU COPA

The APWU COPA fund was established as a political action fund to provide contributions to APWU friendly candidates for office. The Landrum Griffin Act forbids any union from using dues money for political purposes. Although Hatch Act restrictions have loosened, it is still illegal for federal and postal employees to make direct fund raising drives for a partisan political campaign. APWU COPA bridges that gap by making these political action contributions. This fund is made up of voluntary contributions from the APWU membership and their families. As with all of our union endeavors a collective effort of our APWU and Auxiliary families makes this fund a strong voice on Capitol Hill.

Members can also make bi weekly contributions using Postal Ease or an allocation from their checking account. A special form is used for this purpose. Employees/members have the sole control over this method of contribution.

The Auxiliary remains committed to the growth and strength of this fund. Auxiliary members find themselves doing a variety of fund raising activities to support this fund. Auxiliaries involved in COPA fund raising projects must follow the APWU COPA strategy fund raising guidelines that appear in the fund raising section of this handbook.

RUNNING A COPA DRIVE

1. Use the Auxiliary Master COPA Form on page 110 of this Handbook to list contributions. Include the following:

NAME	Address
City, State and Zip code	the last 4 digits of Soc. Sec. # or Postal ID #
Amount of Contribution	check # OR denote cash contribution

Make sure you have the individual forms, credit card forms and the postal ease forms. You can find them on pages 111 and 112.

2. Number each sheet in the upper right hand corner. Total each page of contributions individually. It helps to keep the contributions with each page. Make a cover sheet to produce a grand total of all individual lists. Keep a copy of all pages for your records.
3. Contributions should be sealed in an envelope. At least two individuals should count the contents and both should sign across the seal of the envelope. Make a report of the collections to the state and/or local organization.
4. Group contributions should be mailed by certified or registered mail, return receipt requested, to

**APWU COPA -
CONTRIBUTIONS APWU Accounting Department
1300 L St. NW
Washington DC 20005**

All submitted contributions are recorded at APWU headquarters. Auxiliary members should identify Auxiliary member contributions on the forms. All donations are credited by local and state. Individuals can only be listed in one location. If you make a donation in Texas, but live in Reno Nevada, the donations will be listed under your local. Retirees are listed under the retiree listing at APWU headquarters. Find ways to recognize your local and state members for their contributions.

Auxiliaries are encouraged to keep records of all fund raising activities.



**Public
Relations**

CREATING POSITIVE PUBLIC RELATIONS!

Public relations is the image we present to everyone from our business associates to friends in the auxiliary and union. It includes the way we talk about ourselves and our activities, both what we say and how we say it.

All of our members are involved in public relations, probably just about every day. We may communicate our organization almost anywhere: at auxiliary meetings, committee meetings, union meetings and conventions, work, home, or at school. If we all work together we can present a positive image of the auxiliary, the union and postal service to our community.

There's more to public relations than news stories in the paper. Some pieces of the public relations puzzle aren't readily perceivable. They include the way we answer the phone, how prompt we are at answering our mail, how courteous we are to people we meet, and how open we are to other people's ideas and needs. Keep in mind that if you are going to achieve a positive image you must communicate a positive message at all times. Good public relations is comparable to good salesmanship!

The following pages contain information meant to help you sharpen your communications skills. Don't be afraid to develop and use your talents!

AUXILIARY NEWS & VIEWS

The National Auxiliary News & Views is published by the Legislative Aide-Editor. It is printed and mailed out each month with the exception of July and August. At least one copy is mailed to each individual Auxiliary household. Complimentary copies are sent to Postal Press Association Members, National APWU Officers and other individuals deemed necessary by the National President and/or Legislative Aide Editor.

As the official communication of the National Auxiliary it is used to inform and educate our membership on:

Legislation

National Auxiliary Activities

Safety and Health issues

Membership

Labor Education

Local & State Auxiliary Activities

The APWU Health Plan

National Executive Board Memos

Information for publication must be submitted to the Legislative Aide Editor not later than the 20th of each month (August through May) for the next edition. Articles must be signed by the author or local submitting the report. It is important to familiarize yourself and your local with the information in News & Views. **Members and officers should discuss each publication at local Auxiliary meetings.**

THE AMERICAN POSTAL WORKER APWU - Communication Magazine

As a major source of communication, this magazine is mailed monthly to each member of the American Postal Workers Union, AFL-CIO. Edited and compiled by the APWU, it contains legislative updates and information, communications from the National APWU President and each department of the APWU. There is also information on the union and the Postal Workers jobs. The Auxiliary may submit organizational news and information for publication. This article is compiled by an Auxiliary officer and may contain special Auxiliary news items.

The National Legislative Aide Editor is responsible for the Auxiliary section of this publication. **Articles for this section are to be sent to the Auxiliary Legislative Aide Editor.** Sending material directly to the American Postal Workers Union headquarters will only create a delay in publication as all Auxiliary material received at union headquarters is forwarded to the National Auxiliary Legislative Aide Editor.

It is suggested that items for publication be of a newsworthy matter rather than editorial status. The APWU communications department assists in editing articles so that they resemble a news article rather than a column.

Photographs can be published. Only send photographs or digital picture files, not negatives. (negatives entail an expense of printing and will not be used). Please include a caption identifying each individual in the photograph. With the advent of digital photography, we have the ability to submit pictures via the internet. That makes them very timely. Send a copy of the photograph rather than the original. Include a note with name, address, city, state and zip if you wish to have photographs returned.

Auxiliary members are encouraged to read The American Postal Worker magazine to familiarize themselves with the APWU and its activities and as a source of discussion and action for state and local meetings.

LET'S TALK -

Effective Communication Skills for Auxiliary Members

One of your major responsibilities as an Auxiliary Officer will entail communicating with members, prospective members, and APWU officers and members. We do this in a variety of ways - through our speech, our business communications, and through our published writings. It is important to remember that we represent the Auxiliary to the American Postal Workers Union. Our communications should reflect our current Constitution, Policies and projects. Attacking the matter in three parts is important.

Know Your Subject

Researching your topic from a variety of sources is the best preparation. Whether you are writing an article for News and Views or a union newspaper, or preparing a speech for a convention always avoid plagiarism by utilizing several sources. In journalism class, they teach you to ask six questions for each article. If you can answer these questions, you have sufficient information for your subject. Those questions are:

Who What Where When Why & How



Do I Have A Message?

The next step is to decide on your particular slant on the subject. If you are making *editorial* comments, the commentary (written or spoken) should reflect your opinions. Be certain to let your audience know these are your ideas. However, if the communication is to be *objective* in nature, try to remove your opinions from the piece. Utilize positive and negative, but give both sides. Public awareness or public service commentaries fit into this category.

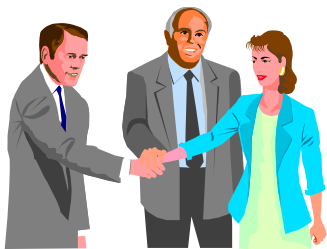
You may be called upon to write persuasive communications. *Persuasive* commentary usually is well researched - thought out from an objective point of view and a stance taken based upon your research and feelings. An example of persuasive commentary might be taken on the issue of Unionism - is it Dead? Could you write a piece that would "sell" your point of view without alienating your audience.

Read your communication. Did it answer the 5w's and the h? Do you like the slant you gave it? Is it objective, persuasive, or editorial in nature? Did you get the attention of your audience? "Grab them with an effective opening." For example, "AND THE WINNER IS ---NOBODY. Did the opening entice you to find out more about the subject? Did you wonder why no one won? Did you see a solution to the problem? Was it informative?

Communications do not need to be lengthy. In fact, short and to the point is received much better by a majority of audiences. In fact, using the acronym KISS will help you remember a golden rule of basic communication: **KEEP IT SIMPLE SWEETHEART.**



Public Speaking



The art of public speaking is a little trickier. Public speaking ranks above death in the fears of the majority of Americans. Your knees knock, your mouth dries out, and thoughts race through your head a mile a minute. What if my voice cracks - OR WORSE - What if they get up and walk out? How can I keep from being afraid? Well, many times you can't.

In fact the only way to conquer this fear is to speak in public time and time again. Try the following :

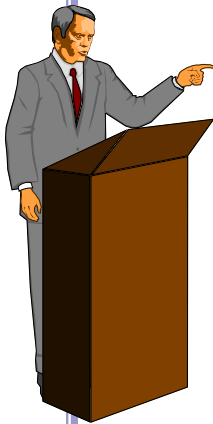
TEN WAYS TO CONTROL COMMUNICATION APPREHENSION

1. Learn and use speech skills to develop confidence.
2. Practice relaxation exercises to control tension.
3. Replace negative, self-defeating statements with positive statements.
4. Visualize yourself being successful.
5. Select a topic that interests and excites you.
6. Select a topic you know something about and research it thoroughly.
7. Use a visual aid to release energy through movement.
8. Practice, practice, practice!
9. Expect your audience to be helpful and attentive.
10. Act confident, even if you don't quite feel that way.

Taken from the book PUBLIC SPEAKING (3rd Edition--Osborn/Osborn, Authors, Houghton Mifflin CO publishers. *These tips and others in this workshop were taken from a speech course and text used at Nebraska Wesleyan University.*)

Utilize note cards to outline your ideas. Put facts and figures down in writing - don't try to wing it unless you're *very familiar* with your material. Don't read an entire prepared text. Eye contact with your audience is important. You can look into the eyes of your audience and see if your message is being heard. Be prepared with a "back up plan". Many times you're not aware of the agenda at a meeting or banquet. You don't want to be repetitious, but you also don't want to lose an opportunity to address the delegation. Make sure you are versatile and can add a different slant to a subject if it has been addressed by another speaker. Utilize the following tips*:

HOW TO CREATE A GOOD PUBLIC SPEECH



1. Choose a subject that is important to you and vital to your listeners.
2. Select a topic that interests you, that you know something about, and that you can bring to life for your audience.
3. Decide on a clear purpose. What would you like your audience to do as a result of your speech?
4. Involve your listeners by asking for their response and relating your topic directly to them.
5. Use testimony, facts, examples, and stories to add substance to your speech.
6. Organize your ideas into a logical design.
7. Use clear, colorful, concrete language.
8. Practice your speech until you can present it smoothly.
9. Be concerned about ethical consequences of your speech.

Effective Listening Skills.

With all of this in mind, there is another aspect of speaking that is just as important. Am I able to really listen to a presentation or do I just hear the words. Ask yourself these questions:*

- Did the speaker bring himself and the audience together?*
- What impact did the speaker's message have on others?*
- Did the speech spark interest in their subject?*
- Can you relate the topic to your own life?*
- Were you able to expand beyond the speech into areas not covered?*
- Was it memorable enough to take home with you?*

GUIDES FOR EFFECTIVE LISTENING

1. Be conscious of your listening behavior. Identify your listening problems and work to solve them.
2. Motivate yourself to listen. Be opportunistic. Get all you can out of the messages you hear.
3. Prepare yourself to listen. Put problems and biases aside so that you can be more attentive and open to new learning experiences.
4. Control your reactions. Learn to recognize situations that cause you to daydream and strive to control them. identify your trigger words so that they become less powerful. Resist distractions. Postpone evaluations and judgments until you have heard all the speaker has to say.
5. Work at listening. Develop a plan to extend your attention. Seek out new and varied listening experiences that exercise your mind.
6. Listen for ideas. Do not try to write down everything you hear. Focus on identifying the main points the speaker is making.
7. Concentrate on the message. Don't allow extraneous factors to interfere with listening effectiveness.



Guide to effective Listening—continued from page 78

Listening to others is one of the best ways to evaluate ourselves as speakers and teachers. Sharpen your listening skills. You can follow these seven guides for effective listening: The final word of wisdom would be to **Know Your Audience!** Who are you addressing? APWU members? Auxiliary members? Children? Officers? Congressmen?

****Know your setting - Is the speech given at a bad time?***

Are you prepared with the proper room and equipment?

What are the expectations of the audience?

Am I aware of any and all changes in my topic?

Should I adjust my words to previous speakers?

How many people are we addressing - and who is in it?

Who should the speech address?

If you're addressing children on Labor Education, giving them an hour of facts on the National Labor Relations Act would be disastrous. However, a few visual aids and a hands on interactive question and answer period might be more informative. Find out what they know, give them an opportunity to share the learning experience with you and then give them the opportunity to experience it. **Hands On Learning** is best for children.

If you're addressing the APWU Executive Board, professional presentation is much more advantageous. Talk from your heart. Add passion to your words - because they are *a reflection of you and what you represent*. Represent your Auxiliary with pride, wisdom and authority. Let your passion for the Auxiliary engrave your words on the minds of your audience.

YOU are the EFFECTIVE COMMUNICATOR!

Additional Tips for Writing a Media Release

With the broad use of the internet it is more important to check and double check your facts and information for all media releases. Formerly called a news release, they can be posted on web sites, sent out via email, sent to local newspapers or radio and television station to publicize public relations projects such as Two-Can-Do or other events. Use the following guidelines when developing a media release:

- **Pick one contact person to represent your group with the media.**
- **Type all news releases, double spaced with ample margins, on one side of the page only. Deliver only a corrected, legible original.**
- **The following reference data should appear at the top of the first page: Name, address and phone number of contact, name of group, and date for release or "for immediate release".**
- **Be brief. Newspaper space and air time are costly. If you must go over onto a second page, type "more" at the bottom of page 1 and use a header and/or footer to re-identify your group and number each succeeding page.**
- **Double check for accuracy. Every fact and figure must be correct, all sources should receive proper credit, and all quotes should be attributed to the right person.**
- **Make sure your news is timely. Check at least one month in advance about deadlines, some newspapers require two weeks or more prior to publication**
- **Be professional. Members of the press are always invited guests.**
- **Always keep a copy of your media release.**
- **Keep in mind that reporters aren't responsible for their organization's policies. Since space is precious, editors may find it necessary to cut your article if more pressing news occurs.**
- **Always keep a copy of your news release.**
- **Be sure you answer the six questions: who, what, when, where, why and how. Make sure you stick with the facts, don't editorialize.**

If you are writing a letter to the editor you may, of course, include your own opinion. Be sure to follow your paper's policies for your letter. For instance, your name and address must usually be included for publication. Newspapers will generally verify the name and address of each author.

Chapter 6

Conventions

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Why Participate?

Every Auxiliary member should participate in his or her state convention, and if possible, national convention because it's a great opportunity to meet your officers and other members of the Auxiliary. Officers come to conventions not only to work on auxiliary business, but also to mentor less experienced members. This is a great time to discuss problems with state or national officers so that workable solutions can be found. You are likely to learn from other Auxiliary members about program ideas that worked well in other locals. You will discover what's new or changed within the Auxiliary. You will learn and practice skills, such as parliamentary procedure, that you can use when meeting with the Auxiliary and also when meeting with other social groups within your own community. Best of all, you will make lots of new friends and find plenty of projects and often entertaining activities to participate in!



Not only will you benefit from attending conventions, but so will your officers and the organization as a whole. Officers look to the membership for guidance in leading the Auxiliary. Members come with fresh, new ideas and perspectives that can spark new approaches to meeting Auxiliary goals. Members also oversee the performance of the officers by setting the rules (constitutions and budgets) and by auditing the books and approving the minutes and reports. Officers can't lead without members encouraging their leadership.

Furthermore, conventions are the place to recharge your batteries. Sometimes officers and members can feel isolated or discouraged. They need other members to talk with who understand them and who can offer suggestions or simply listen. Sometimes members just need to be around other people with similar interests and viewpoints. Not only can you recharge your own batteries, but **you** can be the one spreading enthusiasm and encouragement!

Attending Conventions

There are two ways to attend a convention. You may come as a visitor or a delegate. A visitor may attend all social functions and business sessions but have no vote. A delegate may attend all social functions and vote at business sessions. National officers are always delegates at national convention. All state officers are delegates at state conventions. National officers are accorded a vote at a state convention only if that state's constitution permits. Local Auxiliaries may send people to represent their local as a delegate at state and national conventions, and states may send delegates to represent their state at national convention. Members at large may attend both state and national conventions as delegates. The constitution of the Auxiliary that is meeting in convention specifies how many votes each delegate receives. Locals and states are given more votes than individuals because they represent groups of people, and one delegate may usually cast all of the votes accorded the auxiliary they are representing.

National and most state Auxiliaries require that delegates be certified with credentials. Credentials ensure that a delegate who is representing a local or state has been duly elected. Credentials are also a tool to make sure that the correct number of ballots are cast. Credentials are normally obtained through the secretary of the Auxiliary that is meeting in convention and come with instructions for how they must be filled out and returned.



Conventions—continued from page 82

Delegates should plan to serve on a convention committee. The committee meeting is where a delegate can learn about the nuts and bolts of the organization and share ideas in a small group setting. There are usually several committees to choose from, and the President normally appoints members to the committees. Presidents are usually willing to accommodate your request if you request a specific committee well in advance of the convention.

What business is conducted? Constitutions are updated. Budgets are planned and books are audited. Officers are elected. Resolutions are voted on that give officers guidance on the wishes of the members and set the course for the next term. Officer and Auxiliary reports are reviewed. Courtesies are extended and recognitions are awarded. This is a typical list of business that may transpire at convention.

A convention may offer educational workshops of interest to the members. The workshops may be conducted by officers or experts on the subject. See page 6--13 for workshops available from the National Auxiliary. Delegates and visitors will want to plan their schedules so they can attend any workshops that are offered.

Most conventions plan at least one social function that normally occurs in the evening. This is a time to renew old friendships and cement new ones. You certainly won't want to miss out on the social gatherings!

Delegate's Checklist for Success

- ☑ **ATTEND ALL MEETINGS** You are here to represent your organization. You can't do that if you aren't at the meetings. You will better understand business events and developments if you have attended all of the meetings.
- ☑ **BE ON TIME** -- at all sessions. The program is so full that every minute counts.
- ☑ **PREPARE** Read the material ahead of time. If you have questions make notes and have references ready.
- ☑ **TAKE NOTES** -- lots of them. You owe it to your Auxiliary to bring home as much information as possible.
- ☑ **SPEAK UP** Share your ideas and express your opinions.
- ☑ **BE RECEPTIVE** -- to new ideas and activities.
- ☑ **BE COOPERATIVE** Be willing to do your share.
- ☑ **CIRCULATE** Take advantage of all exhibits and special events. Pick up materials that may give your group ideas for programs.
- ☑ **DIVIDE YOURSELVES** If you came with others from your organization, split up for committees and workshops. Cover all sessions. If you stay with the same group you already know, you will limit your ability to learn and bring back information to your Auxiliary.
- ☑ **MAKE NEW FRIENDS** Make at least one new friend with whom you can exchange ideas and plans during the year. Follow through and maintain those contacts.
- ☑ **BE APPRECIATIVE** Remember to express your gratitude, praise and congratulations to those in charge. The convention committees have worked hard to arrange the convention and its pleasures, and your officers and other delegates have worked hard to ensure a successful convention.
- ☑ **MAKE A REPORT** When you get home, share the information you gathered. Writing your report will organize your notes and give your organization a good reference for future use. If possible, publish your report in your Auxiliary or Union newsletter.

WRITING RESOLUTIONS

A resolution is a formal proposal put before an assembly for action. At an Auxiliary convention, resolutions are used to make changes to constitutions and to establish a policy or procedure. A resolution lays out the reasons for a proposal and formally states the proposal as a **MAIN MOTION**. Resolutions may be submitted by individuals, by officers, by committees or by local or state Auxiliaries.

Action is not taken on some resolutions at conventions because they are improperly written or really don't say what the maker of the resolution intended to say. It isn't difficult to write a resolution once you understand the format. There are four parts to a resolution: the title, the preamble, the resolved and the authorized signatures. The resolution should be written in this format

TITLE

WHEREAS: (state reason) , and
 WHEREAS: (state additional reason) , and
 WHEREAS: (state additional reason) , therefore be it
 RESOLVED: (state action to be taken) , and be it further
 RESOLVED: (state further action to be taken) .

SIGNED _____
 (name typed below line)

SIGNED _____
 (name typed below line)

THE TITLE indicates the subject of discussion. **THE PREAMBLE** is the section that states the reasons for the proposal, it is the **WHEREAS** section. More than one reason may be stated, there is no limit. **THE RESOLVED** is the section that prescribes the action to be taken as a result of the stated reasons. More than one action may be required, so there may be more than one resolved. All resolutions must be **SIGNED** by the maker (s) of the motion. If an Auxiliary is submitting the resolution, it should be signed by that Auxiliary's president and secretary. If a committee is submitting the resolution it should be signed by the chairman and members of the committee.

A resolution pertaining to the constitution should state the article and section of the constitution under consideration. It must clearly state where the change is to be made, citing the article, section and subsection (if any).

Copies of all resolutions should be distributed to all of the delegates at the convention. Some conventions require that resolutions be submitted in advance of the convention so they may be printed into convention booklets or copied for distribution. Anyone wishing to submit a resolution to a convention should consult the convention call, the formal announcement of the convention, for instructions.

The following two examples are to help you better understand how to write resolutions. The first is an example of a constitutional amendment. The second is an example of a miscellaneous resolution.

Sample Resolutions

Minimum Age Article VI, Section 4d

Whereas: All national officers in a position of fiduciary responsibility are presently bonded, and

Whereas: One of the requirements to be eligible for that bonding is to be at least 21 years of age, and

Whereas: The National Executive Board is investigating bonding to cover all state and local officers with fiduciary responsibilities, therefore be it

Resolved: That we delete the language in Article VI, Section 4d and replace it to read: The minimum age of an officer in the auxiliary be twenty-one (21) years, and be it further

Resolved: That upon passage at this state convention that this resolution will be sent by the state secretary to the national secretary for consideration at the next national convention.

Ruby Carlson, State President

Mike Borden, State Secretary

Human Relations Project

Whereas: Auxiliary human relations projects benefit individuals who need our help, and

Whereas: These projects result in positive public relations for the APWU, the Auxiliary to the APWU, and postal workers in general, and

Whereas: The State Union is participating in the River City "Walk For A Cure", therefore be it

Resolved: That the State Auxiliary also participate in the River City "Walk For A Cure", and be it further

Resolved: That sufficient funds be appropriated from the treasury to pay for transportation and meals for all state officers participating in the walk.

Harold Coleman, Chairman State Human Relations Co.

Barbara Spencer, Human Relations Co.

Jane Smith, Human Relations Co.

NATIONAL CONVENTION

Acquiring Credentials

Delegates and alternate delegates representing auxiliaries are elected at their state convention or local meeting. The delegate must be in good standing (dues paid up to date). State delegate credentials are automatically sent by the National Secretary to the State Auxiliary President approximately four months before the National Convention. Included with the credential cards are instructions for filling them out and a deadline for returning them to the Secretary. State Auxiliaries receive several sets of cards, original and duplicate, for at least three delegates and three alternate delegates. Locals wishing to send delegates must send a letter to the National Secretary requesting credentials approximately 90 days in advance of convention. Likewise, members-at-large must also send a letter to the National Secretary to request credentials. Locals will receive sets of cards for delegates and alternate delegates.

The delegate should complete both the original and duplicate credential card. It is important that the cards be legible, so the National Auxiliary recommends that credential information be printed. At the bottom of the card is a space for committee preference and the delegate is encouraged to indicate a preference. If the delegate is unsure of hotel information, the hotel information may be left blank and filled in at the convention upon registration. Both cards must be signed by the president and secretary of the organization the delegate is representing, or by the member-at-large. The original delegate/alternate credential cards are mailed back to the National Secretary before the deadline, which is no later than 30 days before the convening of the National Convention. The duplicate card is retained by the delegate/alternate. The delegate must present the duplicate at the registration booth at the convention. If the delegate can't attend the convention, then the alternate may present the alternate duplicate at the registration booth and be seated instead of the delegate. For further information about credentials see Article V, Section 4 of the National Auxiliary Constitution or contact the National Secretary.

Representation

Representation is based on the amount of per capita tax paid on the average local Auxiliary membership from July 1 of the preceding convention year to June 30th of the current convention year. Per capita tax must be paid for the current year to the first day of the month following convention for the auxiliary or member-at-large to be in good standing and for the delegate to be seated. The minimum age to be seated as a delegate on the National Convention floor is 12.

Every Area Local and Local Auxiliary is entitled to a minimum of 5 votes plus 1 additional vote for each 10 members or the major fraction thereof. State Auxiliaries are entitled to 10 votes. National Officers and Past National Presidents are entitled to 1 vote. Members-at-large are entitled to 1 vote. For further information regarding representation, see Article V of the National Auxiliary Constitution. The National Treasurer can answer all questions regarding per capita tax paid over the period affecting representation.

NATIONAL CONVENTION COMMITTEES

General Committee Information

The National Auxiliary depends on its members to willingly serve on the National Convention Committees and share ideas and opinions. Committee meetings are the best place to meet auxiliary members from other states and learn first hand the business of the Auxiliary.

Committees are appointed by the National Auxiliary President, but delegates may indicate a committee preference on credential cards. All committees will have a National Officer serving as an advisor. A list of committees and committee members can be found in the delegates' convention

materials. The committees will be officially appointed on the first day of the convention. Delegates who haven't been appointed to a committee, but wish to serve on one, may see the National President or the committee chairperson.

The committee chairperson will receive a committee kit containing instructions or rules, stationary, supplies, portable drive and reports of previous committees. The committee must present a final written report in triplicate (one copy each for the National President and National Secretary, the third copy is saved on the portable drive in the committee's kit). The final report must be signed by the committee members.

Credentials Committee

This committee assures that only accredited delegates are seated on the convention floor and the voting strength of these delegates is based on the constitutional provision of Article V of the National Auxiliary Constitution. It is necessary for this committee to meet often, and the committee reports frequently to the convention delegates. The chairperson will be called upon daily and before the elections are held to report on the number of accredited delegates and the number of votes these delegates are casting.

Election Committee

The election committee oversees the election of officers. It is the duty of the election committee to ensure a smooth, secret, impartial and fair election process. Elections take place on Thursday of the National Convention and the committee meets frequently during the week.

Resolutions Committees

Because of the number of resolutions that are submitted to the National Convention and the time and committee work required to process these resolutions, at least two committees are normally appointed to handle resolutions. The two are **Constitution and By-laws**, which handles all resolutions pertaining to the National Constitution and By-laws, and **Miscellaneous Resolutions**, which handles all other resolutions. These committees meet often to consider proposed changes and sometimes feature spirited debate. For further information about resolutions, see the resolutions section of this chapter of the handbook.

Consolidated Report

This committee reviews the report of the National Auxiliary and its officers. The committee makes any necessary corrections and makes recommendations to the body for future reports.

Rules Committee

The Rules Committee is responsible for drafting the rules which govern deliberations of the convention. It is necessary to establish rules of procedure and protocol, such as the times of convening and recessing, seating of delegates and visitors, and basic floor rules to guide the delegates during the transaction of business.

Finance Committee

This committee inspects the financial records of our National Auxiliary and reports to the convention. It does not have to audit the books or determine financial standing, auditing is done by a certified public accountant. The committee does study receipts and disbursements, as well as financial statements, to determine if the funds are being wisely spent and in the best interest of the membership

Political Action Committee

This committee may make recommendations for political action to the delegates and normally has a fund raising drive during the National Convention to raise money for APWU COPA, the PAC fund of the union. The committee is advised by the National Legislative Aide/ Editor.

Planning and Ideas Committee

To meet the changing times, we must constantly look for new ideas and activities that strengthen and expand our Auxiliary membership. As a member of this committee, it will be your responsibility to review, consider and report ideas and recommendations for the future that will broaden and/or refine the interests of our National Auxiliary members.

Courtesy and Greetings Committee

This committee extends courtesies to special speakers and guests. The committee checks the convention agenda and schedule to ensure proper timing of these speakers. The committee sends letters of thanks to convention center personnel, the APWU, and anyone else the committee deems deserving of special recognition. The committee may send greeting cards to former Auxiliary officers not in attendance or members who can't attend due to illness or death of a loved one.

Human Relations Committee

This committee acts as a standing committee and may start work prior to the convention. The Human Relations Committee reviews human relations projects that the Auxiliary is involved in and makes recommendations to the convention. The Committee may conduct human relations projects during the convention.

National Convention Order of Business

The order of business for National Convention appears in the National Auxiliary By-laws. The order may be transposed at any time by a majority vote of delegates with one important exception, the election of officers shall always be on Thursday afternoon of convention. A sample order of business for the National Convention is:

- ◆Report of the Credentials Committee
- ◆Report of the Rules Committee
- ◆Report of the Finance Committee
- ◆Report of Remaining Committees
- ◆New Business
- ◆Election of Officers
- ◆Remaining Convention Business
- ◆Installation of Officers
- ◆Adjournment

National Convention Events

The **MEMORIAL SERVICE** generally takes place on Wednesday morning of the convention. Auxiliary and APWU members, and immediate family of members, who have passed on between conventions are remembered. A committee of National Auxiliary Officers designs the service. It is as beautiful as possible and conducted in a quiet, thoughtful manner. The service is kept brief in consideration of the emotions of some of the delegates who are remembering lost loved ones. Soft lighting, candles, music and flowers are some of the ideas used in the past. They are designed to set a solemn and peaceful atmosphere. As each name is read into the record, a moment of respect and honor is paid to each individual. This continues until all names that were submitted have been read. The names then appear in gold lettering in the Auxiliary Book of Memories.

The names of departed loved ones are submitted prior to the convention. Forms for submitting names to the Book of Memories appear in the Auxiliary newspaper, *News and Views*. Forms can also be obtained from any National Officer. There is a nominal fee for submitting names, with the money going towards the Nilan Scholarship Fund.

Awards Presentation

An awards presentation, which may be a reception, ice cream social or a variety of other creative ideas, is held during the week, normally Wednesday or Thursday. It is intended to honor those members and Auxiliaries for organizing and maintaining membership. National APWU Officers frequently attend the banquet and may speak to those at the banquet. Tickets for the banquet are sold at the registration booth. Spouses and/or other family members are welcome to attend the presentation.

Opening Business Session

The opening business session is held jointly with the Union. This is the time that our National Auxiliary President addresses the entire convention. The session often features special guest speakers and may include videos. Laser light shows have also been a part of the opening session.

Preconvention Workshops

A variety of workshops are offered by the National Auxiliary the day before the convention convenes (normally Sunday). Workshops are presented to guide first time delegates, to train state and local officers, and to teach Auxiliary members how to approach some of our human relations or labor education projects. Workshops are advertised in *News and Views*, a brochure and on the APWU Auxiliary website. Additionally, National Officers attending state conventions will announce them. When attending a National Convention, whether it is your first or your tenth, you should try to attend one or more of the workshops. They are an excellent way to learn and take knowledge back to your Local or State Auxiliary!

Convention Ice Breaker

An icebreaker featuring nationally known entertainers is staged by the APWU on Sunday evening before the first day of convention. National politicians are also on hand to speak to the delegates and visitors. Following the entertainment, a mixer is held where delegates can meet and greet one another.

Hospitality

National APWU Officers and many states host hospitality rooms during the convention. These gatherings are announced at the APWU meetings and are open to Auxiliary members as well.

HOSTING AND PLANNING A STATE CONVENTION



The State Auxiliary President, Local Auxiliary President, State APWU President and Local APWU President should work closely together on the plans for the State Convention. It is important to remember that the Auxiliary is there to *assist*. The State APWU chooses the city and hotel usually either by a vote of the members or by a committee recommendation. Once the convention site is set, dates are established by choosing among the dates the hotel has available. States may cooperate with neighboring states, so that conventions don't overlap.

The Convention Hotel

Auxiliary officers should request that they be included in meetings with the hotel personnel. Auxiliary officers may think of questions to ask the hotel personnel that the APWU officers may not think of. It is recommended that the host local convention committee meet with the hotel staff at least three times prior to convention. The initial meeting should be for general planning. Meet again with the staff about one month prior to convention to go over plans and sign written contracts. A short follow up meeting should take place about one week prior to convention to check on room reservations and see how plans are proceeding. The local or state union may have a procedure in place for handling these meetings. Some things to ask the hotel personnel:

- ❖ What are the hotel rules--Pool Hours? Check in/out times?
- ❖ Does the hotel have a copy machine for your use? Is there a charge to use it?
- ❖ Can the hotel provide American and State Flags?
- ❖ Will the hotel donate 1 or 2 items for prizes?
- ❖ Can the hotel provide audio-visual equipment (vcr, dvd player, tv, easel, projector)?
- ❖ Will there be a meeting room for Auxiliary use? If so, it should be set up class room style. Is a podium and/or microphone available if needed?
- ❖ The state APWU will probably reserve a block of rooms. Will extra rooms be needed for Auxiliary delegates? If so, make sure they are included in the count. Make sure that you are clear on what the room rates will be.
- ❖ Find out who will be in charge of taking room reservations at the hotel and try to meet that person. You may need to help some delegates or visitors with their reservations. Find out how to cancel unneeded rooms and ask about the deadline to cancel.
- ❖ If you are expected to help plan meals or take meal counts you will need to meet with the hotel caterer. What is the deadline for meal counts? Will the hotel be flexible with the count to allow for a few unexpected people? Are you planning rolls and coffee for the Auxiliary meeting? What is the charge? Will there be a cash bar at the parties? What are the rules concerning liquor within the hotel?
- ❖ If you are expected to help with registration, be sure to find out where it will be set up. Check for nearby electrical outlets. Think about traffic flow, i.e. how people will move through the line.

Registration

The Auxiliary may be called upon to help with registration. Make sure that every Auxiliary member helping with registration knows where it will be before convention starts. Decide when this table will be open for business. Some things you may need are: a computer, printer, cash box, extension cord. The cost of registration is set by the union. The fee covers meals, parties, booklets, hospitality, and miscellaneous. The host local will decide how many meals will be included in the registration. The Auxiliary may also choose to have a luncheon and sell tickets for that separately.

Sell meal tickets at registration. Many delegates bring family members with them and would like them to attend the meals and/or party. Make sure you know the prices of each meal since visitors may attend only one of the meals.

Set up a separate bank account for just the convention receipts and expenditures if you are in charge of the money. Do not mix convention monies with the local account. Do not allow money to accumulate unwisely. Have a reliable person make frequent deposits at the bank. Have a cash box ready with change. Have a receipt book on hand, everyone will want a receipt.

Use separate sign in sheets for National APWU Officers, State APWU Officers, Local APWU Delegates, APWU MALs, Auxiliary, and Visitors. This is important for the APWU credentials committee. The sign in sheet may include name, address, phone, the local represented and last 4-digits of social security number (optional--used by the COPA committee).

Make sure everyone receives a name tag, their meal tickets, convention bag if available, and receipt if requested. The registration table is a great place to sell raffle tickets or other fund raising items.

Convention Publicity

A small ad stating date and place of convention can be printed in the State Union/ Auxiliary newspaper as soon as this information is known. The earlier the convention is publicized, the greater the turnout because people can make plans for annual leave. Later, a more detailed notice about the convention (including dates, town, hotel, room rates, etc.) should appear in the state and/or local union/auxiliary paper. Be sure to include as much information as possible. Include who to contact with any questions.

A convention call should be mailed out 90 days prior to the convention. Send it to all members. This should be a detailed notice highlighting all events planned and again stating where, when, and who to contact with questions. This notice should quote any constitutional provisions for number of delegates allowed at the Auxiliary meetings and their voting strength. It should clearly state what, if anything, the delegate is expected to bring. This may include membership lists, reports, entries for contests, COPA prizes, etc. Some states may wish to mail credentials with the convention call. Committee chairpersons may be notified of their appointment at this time so they may begin preparations.

Special Speakers or Officers

If you would like to have a special speaker and/or National Officer attend it is best to send an invitation well in advance of the convention. Six months is not too early to send invitations, and if you plan to ask a Representative, Senator, or Governor, a year in advance is not too early! As convention time approaches, follow up letters are a good idea if the invitation went out six months or more in advance. If you plan to request National Auxiliary and/or Union Officers, you should not only send an invitation to the Officer, but also to the Union and/or Auxiliary National President requesting approval for that officer to attend. The National Auxiliary President appoints National Officers to attend state conventions as early as mid January, but not later than the end of February. You should have your invitation and request mailed out before the appointments are made.

Both the invitation and request should include all information that will help the Officer make plans to attend. The Officer will need to know convention dates, convention city or town, how to make hotel reservations, what the room rates will be, and what the registration will be. If you aren't sure of the expenses, at least send dates, place and hotel information. You can follow up with another, more detailed, letter at a later date. The Officer will also need to know what he or she will be expected to do at the convention. Will they be speaking to the convention? Do you want them to prepare a workshop or training? If so, be specific with your request. The Officer may need several weeks to prepare workshop materials. Your National Officer is happy to assist you in any way possible. However, you should order your supplies directly from the National Secretary at least 60 days prior to your convention. This will ensure that you have recruiting materials, dues envelopes, collects, etc.. in sufficient quantities.

Workshops Available from the National Auxiliary

Political Action, Legislation, Lobbying
 Membership & Recruiting
 Human Relations (Several Topics Available)
 Officer Training & Parliamentary Procedure
 Safety and Health (Several Topics Available)
 Survivors' Benefits
 Public Relations--Speaking and Writing
 Audit Procedures
 Labor Education

COPA Fund Raising

The APWU and Auxiliary normally cooperate to raise funds for COPA, the union's pac fund, during state conventions. Information about the COPA fund drive should appear in pre-convention publicity and the convention call. If donations are needed, your members and locals should be notified of exactly what they should bring. You should designate a secure

space for displaying and/or storing COPA items. Do not leave items or merchandise in an unattended display. Be sure to plan day and time of your COPA event with the host local and the State Union President. Cooperation ensures that your event does not conflict with other convention events and has the support of your state union members. For fund raising ideas and guidelines see the fund raising section of this handbook.

Hospitality Room

If you should be asked to assist with the hospitality room you will find that planning and budgeting is essential. Decide in advance when this room will be open and who will be responsible for it. The hospitality room should not be open during business sessions or parties. Delegates and visitors should be encouraged to participate in those events instead and this will keep your expenses within budget. Plan a budget that includes all food, liquor, soft drinks, juices, cups, napkins, plates and anything else you plan to have in the hospitality room. Discuss your budget with local and state union officials. Know who will pay for supplies before you buy anything. Set an absolute, reasonable limit on expenditures and when that limit is reached do not restock. Decide who will run errands to restock food, drinks and supplies if necessary. Make plans for clean up. You will probably want some cleaning done every day the room is open.

Human Relations Project

This is better known by Auxiliary members as the Two-Can-Do Project. The purpose of the project is to help people who are in the greatest need, to encourage postal families to look beyond their own daily problems to see the needs of others, and, if promoted correctly, to make a positive public relations statement about postal families.

Advance promotion of this project cannot be overemphasized. You should start planning six months or more in advance by identifying the organization that collected items and money will go to. Involve union officers in your decision making and get the full support of the union membership. The Two-Can-Do project can be the highlight of a convention if everyone works together to ensure a successful project.

Contact the director or other person in charge of the chosen organization and learn as much as you can about the organization. If possible, tour their facility. Find out what their greatest need is and how they handle contributions. Ask to see their financial statement. Plan how contributed items will be transported from the convention to the organization's facility. Involve the director of the organization in publicity. Ask him or her to write an article for your union/auxiliary newspaper that explains the agency to your membership. The director may be able to help you with publicity within the community as well. The director may know a contact at the local newspaper or TV or radio station.

Make sure you have adequate secure space at the convention to store and display the contributions. Plan a presentation ceremony with the State Union President. Request that someone from the organization come to the convention for a presentation ceremony, and ask them to speak at the convention. Make sure the organization is kept abreast of all plans, especially the date, time and length of time allotted for the presentation. Make follow up calls to the organization and state union

president about one week before the start of the convention to go over plans one last time before the presentation. Set up a place to meet your guest speaker during this call and make sure someone meets and greets your guests as soon as they arrive at the hotel.

Go all out with publicity. Highlight the purpose and positive aspects of both your target organization and the Union/Auxiliary. Send news releases to the local newspaper of the convention city. Do radio interviews. Invite the press to attend the presentation ceremony. Include union officers in publicity planning and execution. Make sure union officers and members get credit for their contributions and work as well as auxiliary officers and members. Don't overlook anyone. You'll see the benefit next year when you are looking for help with this project!

Miscellaneous Convention Planning

Will the convention need interpreters for the deaf? It never hurts to ask. Be prepared.

Arrange for baby-sitters on a stand-by agreement. Decide how much they will be paid and who will pay them. Will the auxiliary charge the delegates for the service then pay the sitters, or will the delegates pay the sitters directly. Decide when the service will be available--during business sessions only, evening entertainment only, or both business and entertainment times.

Have someone available and ready to pick up dignitaries, visitors and/or delegates at the airport or bus station.

Will the convention need a florist? If so, make arrangements with a florist.

Are you planning entertainment? Do you need a band or DJ? If so find out the cost, how long they will play and what type of music. Ask a band for a demo tape. Shop around, pick a union musicians if at all possible and get a written contract.

Do you need door prizes? How many? Who will get them? Where will you store them? Who will be in charge? Who will take tickets and conduct drawings? Be sure to bring double tickets or tickets numbered on both ends to the convention.

Enlist the Chamber of Commerce to help make contacts with local businesses and community leaders. Does the convention want the Mayor to attend the opening session? Do you want the American Legion for the flag ceremony? The Chamber of Commerce may be able to help you. The Chamber may also provide convention bags, coupons and give-away items for convention bags, door prizes, and name tags.

**BE SURE ALL CONVENTION PURCHASES ARE UNION MADE
OR AT LEAST MADE IN THE U.S.A!!!
HAVE FUN AT YOUR CONVENTION!!!**

Chapter 7

Fund Raising

Chapter 7—Fund Raising

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Fund Raising Guidelines

These guidelines have been developed by the National Auxiliary Executive Board to help you have a successful fund raising project. A form to help you keep a record of your project is provided in the Forms section of this handbook.

Planning Your Project

Make sure you have **all** needed materials and enough people to carry out the project. Make all ideas feasible. Don't plan anything that is too time consuming or you'll lose interest before the project is completed.

- Check local and state laws concerning the proposed project. For instance, if you plan a raffle, is it legal in your area?
- Follow all APWU COPA rules for COPA projects. (APWU COPA Strategy rules follow the Guidelines on page 97.)

Do not expect one person to handle money from multiple projects. If you are running projects simultaneously, appoint different people to collect and count the money for each project.

All raffle or sales items should be union made or at least made in the U.S.A.

Try to get sales and raffle items donated if possible to increase profits.

If ordering sales items, order only as many units as you believe you can reasonably sell. Orders should be authorized by at least two people within the Auxiliary. Items can usually be reordered and sent express. Take orders from customers in the meantime. Better yet, take orders from your customers before you order items and collect money upon delivery.

Executing the Project

- * Utilize the talents of your members. The best bakers should bake the food for the bake sale. The most organized people are the best ones to keep track of the money. The most outgoing members will be the most successful sales people. Etc.
- * Members are most effective if they work in teams for each project. Example: In an auction one person is the auctioneer, another person walks around the room with the item so everyone can see, another person collects money from the bidder and takes it to a fourth person who keeps a record of the item, amount collected, and successful bidder.
- * Handle money as if it were your own life savings. Double count all money collected.
- * Seal counted money in a money bag and deposit immediately or put in a secure place. A hotel room is **not** secure. Keep cash in a hotel safe deposit box until you leave the hotel.
- * Don't leave cash unattended in a vehicle. If you stop for lunch, take the cash in with you. Be discreet and make sure you have it with you when you leave.
- * Keep funds collected for different projects separate with notation of what each is designated for.
- * If project is held during a convention, make partial reports to the delegates on the progress of the project. If meeting will adjourn before the conclusion of the project, make a written report about the results and send to the Officers of your Auxiliary. You may also wish to have results printed in the national newsletter, News and Views.
- * If you're having a raffle and don't specifically state that winner must be present to win, make sure that names and addresses are written on the back of the ticket so you will be able to

forward the prize.

- * Advertise your project! Put up large, colorful signs. Make announcements at conventions/ meetings about your project. Run advance publicity ads in newsletters.
- * Be prepared to issue receipts. For many projects, donations are tax deductible. Find out if yours is, then let your donors know.

Follow Through

- * Deposit all money in the bank as soon as possible.
- * Send a check with a brief letter to the organization that is receiving the money as soon as possible. Don't put off this important part of the project! If this is a COPA project, make sure you follow APWU COPA Strategy guidelines (next page) and suggestions found in The Auxiliary Star -- Five Goals of the Auxiliary chapter of this handbook (see political action).
- * Pay all bills associated with the project.
- * Submit a final written report to the officers of your Auxiliary.
- * Send a brief description of your project and results for publication to the editor of *News and Views*, the National Auxiliary newsletter.

What You Can Do:

1. You can use local dues or treasury "seed money" to help raise COPA contributions, provided that your costs do not exceed 33 cents for every dollar raised.
2. All income and expenditures from raffles or other events must be documented, including receipts and sent to APWU National Headquarters.
3. You must keep a record of the names and addresses, union local numbers and amount received from each COPA contributor and forward this information with all monies to APWU National Headquarters.
4. The following message must appear on the front of all materials used in COPA fund raising activities; "A copy of the COPA committee report is filed with the Federal Election Commission and is available for purchase from the Federal Election Commission, Washington, D.C."
5. In soliciting funds, you must make clear that all donations are voluntary and that they are being used to support candidates for federal office.
6. You can spend union dues money to print and distribute literature which educates your membership on the candidates' positions on the issues.
7. You can "loan" paid union staff to work in a campaign.
8. You can use dues money for non- partisan voter registration and Get Out The Vote (GOTV) drives aimed at APWU members and their families.
9. Auxiliary members can conduct COPA phone banks to request direct contributions and/or pledges and pledge cards.

What You Cannot Do:

1. You cannot raise money from or sell tickets to non-APWU families.
2. You cannot mix COPA funds with treasury or personal funds. A separate account should be set up and all funds should be sent to the COPA office at APWU Headquarters.
3. You Cannot send the COPA money you raise directly to a candidate for federal office. The money must go to APWU COPA first.
4. You cannot accept free prizes or merchandise from a corporation since contributions to a federal campaign are illegal.
5. You cannot accept anonymous or unidentified cash contributions in excess of \$50.00 (fifty dollars).



APWU COPA STRATEGY

Guidelines for Raising and Spending COPA Money

Project Ideas

Before you undertake fund raising projects, read through all Auxiliary and COPA fund raising guidelines!!!

Raffles

The key to a successful raffle is to have a prize that everyone would like to win. Prizes can range from handmade items to electronics. The 50/50 raffle is always popular, the winner gets half of the total money collected. A variation of the 50/50 raffle is to ask everyone to put their name on a \$5 or \$10 bill, all money is put in a box or hat and one bill is drawn out to determine the winner of half of the money. The main advantage to a raffle is that minimal supplies and people are needed to carry out the project. Raffle tickets, both single and double, can be purchased at discount stores, office supply stores, and novelty shops. Raffle tickets are generally inexpensive. You can also make your own and ask everyone to put their name and address on them. It is important to prominently display the prize, sufficiently advertise, and sell tickets up to the last minute.

Personality Challenge or Contest

The whole idea of the personality challenge or contest is to get someone well known by members to do something amusing or award that person with a ridiculous prize. The challenge is a challenge to raise money beyond a goal and the personality is stuck with the task or prize. Some groups have expanded the idea to include more than one personality. The challenge then becomes a contest. For example, collect money for several personalities and the one raising the most money is the "lucky" person stuck with the task or prize. It is important that the planners of this project keep it within reason. Everyone's safety and dignity must be considered. The "personalities" must all be good sports and informed about the project prior to announcing the project.

This project is easily adapted to your group and particularly effective if the result is an inside joke. Members may be aware of something comical about the personality that they are reminded of because of the task or prize.

Some variations have included: personality swims a lap or two in the hotel swimming pool, personality gets to kiss a pig, personality wins a goat, personality has to sing the crowd's favorite ditty, personality has to cross-dress and dance with someone of the same sex, personality has to shell out \$X for the project because \$X was collected (it's particularly important to communicate with the personality on this one). The number of variations are limited only by the imagination of the planners.

Auctions

The standard auction is very effective. Prizes for all types of auctions should be items that appeal to the group and may include gag prizes such as an NBA's jacket. Prizes for the auction should be displayed in a secure, well lit location that everyone has easy access to before the start of the auction. Prizes should be held up or prominently displayed as they are auctioned. The auctioneer must be clear about the bid. The floor runners must help the auctioneer identify the bidders. Bidders may hold up a hand if all names of participants are familiar, otherwise bidders should hold up a card with a number. Someone must keep a record of all items auctioned along with auction price and successful bidder's name or number. The auctioneer should clearly state the name or number of the successful bidder for the benefit of the record keepers before moving on to the next item. Money may be collected by floor runners or by record keepers at the conclusion of the auction (or at pre-arranged times).

There are many variations on the standard auction. **The Dutch Auction** is popular with many groups. Each participant raises a \$1 bill (or \$5 or "funny" money such as COPA Bucks). A timekeeper decides a time limit for the auction that is random and unknown to everyone except the timekeeper. The timekeeper is seated with his/her back to the group. The auctioneer starts the timekeeper and points out "bidders". Floor runners float from bidder to bidder as pointed out by the auctioneer until the timekeeper calls time. The person holding the dollar collected when time is called or closest dollar collected before time is called is declared winner of the prize.

Prizes for **The Silent Auction** are displayed with a sealed bid box. Bidders write their bid, name of prize and their name on a bid sheet that is deposited in the bid box. The highest bidder purchases the

prize. All bidders are forced to come up with their highest bid for each item in order to win. Money is collected when prizes are awarded and the National Auxiliary suggests that participants must be present to win in order to expedite collection of money and prevent controversy.

The Speakers Auction is a unique way to limit the endless speakers at a banquet. Time is the prize in this auction. Bidders bid on the time they don't want speakers to speak, speakers must take 1 minute off of his/her speech for each \$10 collected.

The White Elephant Auction awards those useless, ugly, unusual or unique household dust collectors donated by the members for the auction. Bidders may bid on their favorite item or may purchase items and "award" them to other members. Bidders may pay for the privilege of "stealing" items from other members to keep for themselves or so they can "award" the item to another participant.

The Blind Auction is a variation of the old grab bag idea. Bidders bid on wrapped boxes containing mystery prizes. Bidders may bid on balloons or envelopes containing numbers that correspond to unknown prizes, or that correspond to prizes that are on display.

The Slave Auction sells the services of a member to the highest bidder.

The Date Auction awards a date with a convention personality to the highest bidder.

Casino Party and Games of Chance

It is especially important to check all laws before holding these types of events. The casino party requires a fairly large number of volunteers and some specialized equipment such as roulette wheels and craps tables. Sometimes equipment can be rented or borrowed. People can use play money that is sold by a cashier. Prizes can be auctioned at the end of the evening with all successful bidders paying with play money winnings.

Bingo is an ever popular example of this type of project. It requires callers, bingo cards (single and multi), space markers, floor runners and cashier.

Games of Skill

Any number of games of skill can be staged from dart/pie throws to hula hoop or dance contests. Trivia contests may pit locals of similar size against one another.

An "Olympics" featuring various kids' games such as hop scotch, jacks, water gun shoot, etc. can be set up. Participants buy tickets to attend and try as many games as they wish. Scores are kept at each game by officials. The person in each event with the highest score wins a prize. Second chances at each event can be sold.

The Benefit Dinner

These events can be very successful if well planned and sufficient volunteers are available to help. A location must be arranged, supplies purchased and tickets sold. The event requires lots of advance publicity. Cooks, waiters, cashiers, dishwashers and bus people, are needed. A strict budget must be followed to make money. It is best to get as many supplies as possible donated. The project can be simple or more complex depending on the menu.

A variation is the "**Crazy Dinner**". All menu items and utensils are given crazy names, or names are all mixed up on the menu. Diners "order" their meal from the menu. Meals are served in several "courses" so diners eventually get all their tableware and food items.

The Progressive Dinner moves diners from house to house to partake in different courses. This dinner can be done in reverse--starting with desert and ending with hors d'oeuvres.

Rummage and Garage Sales, Craft Fairs, Bake Sales

These can be elaborate or simple affairs depending on the number of volunteers and items donated for sale. Ads should be placed in the local newspaper and signs put out to attract customers.

There are variations on these sales including **The Cookie Carousel**. Customers purchase homemade cookies, mix and match, by the dozen from a wide variety of cookies. Sacks or boxes are required for packaging.

The Used Book Sale is a good way to help community members unload their used books. Books should be collected up to four weeks in advance of the sale (one way is to place barrels at grocery stores or other community gathering places). Books should be sorted and displayed by type. All books on a

table should be priced the same. Books should be priced low, no more than \$2. At the end of the sale, sell books by the bag--perhaps \$1 for a grocery bag full. The sale should be well publicized, held in a prominent community location, and collection barrels should be checked daily.

Service For Cash

This category includes the car wash and other services for payment. Some civic and athletic events need concession workers and will pay groups to run stands. Check to see what is possible in your community.

Merchandise Sales

Your group may order specialty items for resale. Find out if you must collect sales tax and keep good records. Follow Auxiliary guidelines for these sales found in this chapter. You may wish to sell clothing items, cookbooks, or novelties. Buy union if possible or at least made in U.S.A.

Pocket Change Collection

There are several variations on this idea. One is that everyone who registers for the convention/meeting must empty all pocket change into a jar. Another is that everyone must empty all their pocket change into their (empty) water glass at the banquet.

Members may be asked to empty all their pocket change if certain conditions aren't met. For example: if member is not wearing anything union made the member must give up all pocket change, any member not wearing a name tag must give up all pocket change, or any union member not sponsoring an auxiliary member must give up all pocket change, etc.

Jail and Bail, Hostage Crisis

Participants can purchase arrest warrants to cause a member to be put in "jail" until bail is paid either by that member to someone else. A variation of this idea is to read the arrest warrant from a microphone. Members can make up amusing reasons for issuing the warrants.

Hold a National Officer hostage and ask the union membership for ransom so the Officer can be "sent back to Washington, D.C."

Mystery Party and Theme Parties

This is a staged who-done-it. Members "play" different characters and pay to guess who done it. Party goers may be charged admission and for refreshments. A script and directions for "The Mystery of the Poisoned Heiress" is available from the National Auxiliary Secretary for a nominal cost.

Hold a costume theme party and charge admission. Sell refreshments and have a DJ or other entertainment.

Miscellaneous

The Costumed Character -- dress a member up in a costume (toucan, gorilla, or other appropriate costume) to solicit contributions. This person should really ham it up for maximum contributions.

A variation of the Costumed Character is the **Mail Stripper**. Cover the character with taped on envelopes addressed to the beneficiary of the project. Sell the envelopes to the audience. Envelopes are then stripped off until the character is left in nothing but a pair of silk boxer shorts. Auction off the shorts at the end.

WANTED: Your Unique Ideas

If you come up with an idea that has not been included in this list the National Auxiliary would love to include it in future updates of this section. Please inform any National Auxiliary Officer of your idea and ask that it be included in the next update of the Auxiliary Handbook.

Chapter 8

Auxiliary

Chapter 8 Forms

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National Auxiliary Supply Order Form

***Note - Orders with no balance due may be faxed or emailed to the Treasurer**

The following promotional items are available from the National Auxiliary. Please fill out this order form in duplicate, keeping a copy for your files. Send the completed form with a check or money order for total amount due to the National Auxiliary Treasurer. Checks should be made payable to: The National Auxiliary to the APWU. The Treasurer will fax a copy of the order form to the Secretary.

**Mail to: Trisa Mannion Treasurer 3038 Cloverdale Ct Grand Junction CO 81506
email:tmaux@aol.com fax # 970-243-7706**

Postage and handling is included on all items - unless otherwise noted.

QUANTITY	PRINTED OR SPECIALTY ITEM	UNIT COST	TOTAL COST
	The following promotional items are available from the National Auxiliary. Please fill out this order form in duplicate, keeping a copy for your files. Send the completed form with a check or money order for total amount due to the National Auxiliary Treasurer. Checks should be made payable to: The National Auxiliary to the APWU. The Treasurer will fax a copy of the order form to the Secretary.	FREE	FREE
	(Free Download available in pdf format on www.apwuauxiliary.org)	FREE	FREE
	Postage and handling is included on all	FREE	FREE
	Organizing Packet		
	Auxiliary Handbook CD copy	\$ 5.00	\$ -
	Auxiliary Handbook Printed - Black and White	\$ 10.00	\$ -
	Auxiliary Handbook Printed - Color Copy	\$ 25.00	\$ -
	Additional Membership Application Envelopes after the first 50	\$ 0.10	\$ -
	Membership Application Envelopes after the first 50	\$ 0.10	\$ -
	Pledge Cards	\$ 0.05	\$ -
	Additional Informational Auxiliary Flyers after the first 50	\$ 0.10	\$ -
	Membership Cards	\$ 3.00	\$ -
	Guide to Parliamentary Procedure Flip Chart	\$ 4.00	\$ -
	Why Unions are Good for You and Your Family (booklet)	\$ 8.00	\$ -
	Stationary Envelopes (per unit of 100 envelopes)	\$ 8.00	\$ -
	Stationary Packet (includes 50 each of envelopes & letterhead)	\$ 8.00	\$ -
	Auxiliary Lapel Pin	\$ 5.00	\$ -
	Auxiliary Song (circle one) CD or Cassette Includes other labor songs	\$ 5.00	\$ -
	TOTAL		

**Ma Trisa Mannion Treasurer 3038 Cloverdale Ct
Grand Junction CO 81506
email:tmaux@aol.com fax # 970-243-7706**

Revised 1/22/2014

Name _____
 Ship to: Address _____
 City, State, Zip _____
 Your email: _____

for office use only

Date Rec'd _____
 Date faxed to Sec. _____
 Date Shipped _____
 Del Conf # _____

Ordered by: (your signature)

Envelopes after the first 50	0	\$ -
Additional Membership Cards after the first 50	0.1	\$
Pledge Cards	0.0	\$



★ AUXILIARY ★

Per-Capita Membership Form

Instructions

A per-capita membership form must accompany all funds intended as payment of per-capita (dues) to the National Auxiliary to the American Postal Workers Union. Make a copy of this form and enclose it with your next per-capita payment. It is extremely important that information on this form is complete for all members whose per-capita is being paid. Members-at-large (MALs) please fill in local affiliation on Name of Auxiliary/Local Affiliation Line. Mail completed forms and per-capita check to the National Auxiliary Treasurer.

_____ **Total Amount Enclosed** \$ _____
 _____ **Name of Auxiliary or MAL Local Affiliation**

_____ **Number of Members Paying**

Paying From _____ **Paying To** _____
 Date Date

Name of Person Remitting Per-capita Tax _____

Please complete a membership roster for each member you are paying for:

Name	Mailing Address	City	ST	Zip	\$Amt Pd	From-To	New



Officers List Update

Instructions

Make a copy of this form and complete it annually. This form should be filled out each year by State, Local and Area Local Secretaries in the same month that the organization normally holds elections. Please do this each year even if you elect the same officers or if your officers will be serving multiple year terms of office. Fill out the offices that apply in your Auxiliary only. Mail the completed form to the National Auxiliary Secretary and a copy to your National Auxiliary District Coordinator.

Name of Auxiliary

Term Of Office: _____ **to** _____
Beginning Date Ending Date

President: _____ **Phone No:** (____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Vice Pres: _____ **Phone No:** (____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Secretary: _____ **Phone No:** (____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Treasurer: _____ **Phone No:** (____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Legislative Aide: _____ **Phone No:** (____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Editor: _____ **Phone No:** (____) _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____



Fund Raising Project Record

Auxiliary : _____

Date of Project: _____

Money was raised for: _____

Brief Description of Project:

Number of people needed to carry out project: _____

Materials needed to carry out project:

Gross Amount of Money Raised:

Less Fund Raising Costs:

Net Amount of Money Collected:

Comments and/or recommendations for those considering this project in the future :



Goals and Objectives Worksheet

Goal Statement: _____

Objective # _____

Tasks For Objective #	Person Responsible
Target Date	

Objective # _____


Tasks For Objective #	Person Responsible
Target Date	



**Checklist
Affiliate Organizations Audits**

Records needed	Acceptable	Not Available	Not applicable	Concerns/Comments
Bank statements				
Check stubs				
Canceled checks				
Deposit Receipts				
Receipt Book				
Unused checks				
Receipts received				
Vouchers (current period)				
Financial Reports				
current year				
last year				
1st month of current year				
IRS records, etc.				
EIN (match natl #)				#
Last audit report				
Constitution				
Policy statement				
Inventory lists				
Minutes				
membership meetings				
executive board meetings				
Membership records				
Audit report signed				
Bonded				\$

Additional Comments

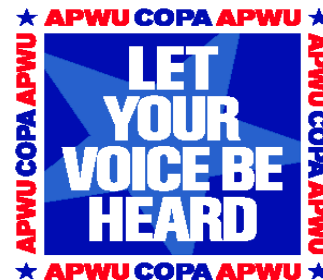
 COPA Collection APWU & AUXILIARY					Date	
	Name	Social Security #	Address	City & State	Zip	Amount ck or cash
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						

To Contribute to COPA through *PostalEase*

Follow the instructions below:

1. Add your Social Security number to the 8-digit COPA account number (29320001) in #11 on this form. This 17-digit number (no hyphens) will enable the APWU to identify this contribution as having come from you.
2. Dial 1-877-477-3273 (1-877-4PS-EASE).
3. Press #1 for *PostalEase*.
4. When prompted, enter your Social Security number.
5. When prompted again, enter your USPS PIN number. (If you do not have a USPS PIN or cannot remember your PIN, follow the instructions on this form, under "Don't Have Your USPS PIN?").
6. When prompted, choose option #2 (to select payroll allotments).
7. When prompted, choose option #1 (to select type of allotment).
8. When prompted, press #2 to continue.
9. When prompted, press #3 to "add" the allotment.
10. When prompted, add routing number: 054001220.
11. When prompted, enter the account number: 29320001_____, followed by your Social Security number (no hyphens, 17 digits total). Press #1 if correct.
12. When prompted, press #1 for checking.
13. When prompted for the dollar amount of the allotment, enter \$____.00, your choice for a biweekly allotment. Press #1 if correct.
14. When prompted, press #1 to process.
At this point, you'll be provided with a confirmation number and the start date of the allotment. Record the confirmation number _____ and start date _____.
15. Press #1 to repeat, or press #9 to end the call.

Retain this form for your records.



Contributions or gifts to COPA are not deductible as charitable contributions for federal income tax purposes. COPA will use the contributions it receives for political purposes, including making contributions to candidates for federal, state and local offices, and addressing political issues of public importance. Contributions to COPA are voluntary. More or less than the suggested amount may be given, and the amount given or the refusal to give will not benefit or disadvantage the person being solicited. Federal law requires political action committees to report the name, mailing address, occupation, and employer for each individual whose contributions aggregate in excess of \$200 in a calendar year.

Don't Have Your USPS PIN?

To obtain your PIN: Call *PostalEase* at 1-877-477-3273. Press #1 for *PostalEase*. When prompted, enter your Social Security number. When prompted for your PIN, pause, then press #2. Your PIN will be mailed to your address of record the next business day.

To Contribute to COPA via Electronic Fund Transfer

Please fill out and mail coupon *with a voided check or deposit slip* to:
APWU COPA • PO Box 96542 • Washington, DC 20077-7120

Once every payroll cycle the COPA fund will automatically deduct the amount you choose to contribute, with no fee to you.

I hereby authorize my bank to deduct from my checking account the sum of:

\$1
 \$2
 \$4
 \$6
 \$10
 \$ _____

per pay period and forward that amount to the American Postal Workers Union, Committee on Political Action (COPA). I make this authorization voluntarily and may revoke it at any time by notifying the APWU COPA Committee in writing.

Name: _____

Social Security Number _____

Address: _____

City _____

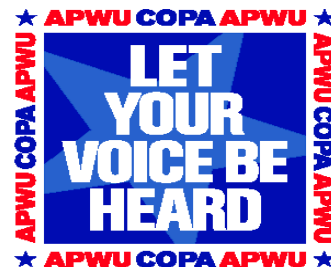
State _____ Zip _____

Local _____

Occupation _____

Date _____

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To Contribute to COPA by Check or Credit Card

Please fill out this coupon and mail to:

APWU COPA • PO Box 96542 • Washington, DC 20077-7120



↑ My check in the amount of \$_____ is enclosed.
(Please make your check payable to APWU COPA)

↑ I would like my contribution of \$_____ charged against my MasterCard, Visa, AMEX or Discover Account.

MasterCard or Visa Number _____

Local _____

AMEX or Discover Number _____

Expiration Date _____

Occupation _____

I authorize COPA to charge my contribution against my credit card.

Signature _____

Date _____

Name _____

Social Security Number _____

Address _____

City _____

State _____ Zip _____

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