

2025
2026

Handbook of Information



Auxiliary to the
American
Postal Workers Union

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Handbook Of Information

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Assisting the Union

Human
Relations

Legislation

Political
Action

Public
Relations



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Defining the Auxiliary

General Officers



Trisa Mannion
President



Karen Wolver
Secretary



Janeil Payne
Treasurer



Janice Gillespie
Leg-Aide-Editor

District Coordinators



Brooke Schilling
District 1



Roxanne Heckman
District 2



Kathryn Walker
District 3



Debra Stewart
District 4



Barbara Maciejewski
District 5



Arline Holmes
District 6



Lisa Beer
District 7



Introducing the Auxiliary

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



The National Auxiliary will provide the tools you need to succeed. Guidelines are set for organizing locals, growing memberships, and officer training. In addition, workshops addressing the areas of human relations, Legislation and lobbying, labor education, safety, and communications are available.

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. Each applicant must be a member for at least one year of the APWU National Auxiliary.

Other Auxiliary sponsored human relations projects have included the "Two Can Do" food drives for shelters, food banks, Share-A-Bear, Children Incorporated, and the Feeding America Backpack Program. Projects benefitting veterans and their families have been the Wounded Warriors Amputee Softball Team, Fisher House, and several others. 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 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 while allowing members to collaborate with their community, enjoy our members' friendships, and grow personally and professionally.

Historical Background

The history of the Auxiliary parallels the history of the postal unions, and our purpose has always been to assist the APWU. 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 formed 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 years before the merger. As a result, 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 at the time and an ever-increasing cost of living, the object of the Auxiliary to the NFPOC was to bring together women interested in securing better working conditions. In addition, the goal is to extend knowledge of desired remedial legislation, render sufficient aid in obtaining passage of legislation, and support workers to achieve 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 the organization of some of the Auxiliaries. However, there is a keen interest on the part of our present members for the roots of our organization. Therefore, a booklet detailing the forerunner Auxiliaries' history 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 held in New Orleans in 1972, the total membership stood at 5,598. There were 424 state and local Auxiliaries with 5,175 members and 423 MALs. Maggie Reimann was elected as the first President. Since the merger, the Auxiliary has become more inclusive and democratic. For instance, more men participate in all levels of the Auxiliary. The Auxiliary has adopted progressive programs such as Labor History Education, video conferencing, i.e., Zoom, and the Auxiliary Nilan Continuing Ed Scholarship. The Auxiliary logo has been updated. The Auxiliary underwent redistricting, and the National Board shrank from 26-13 members. We currently have 11 members on the National Board.

We have been challenged many times in all these years, and many changes have occurred. Yet, we have built on the wisdom and experiences of those 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

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
	New Mexico	North Dakota		West Virginia	Tennessee	New Hampshire
	Utah	South Dakota		Wisconsin	Virginia	New Jersey
	Wyoming					New York
						Pennsylvania
						Rhode Island
						Vermont

Guam, Puerto Rico, Pacific Islands, and Virgin Islands are represented by the General Officers.

State Organizations

Defined as any one of the following examples:

- A minimum of three (3) Auxiliaries
- Two (2) Auxiliaries and four (4) Members-at-Large
- One (1) Auxiliary and eight (8) Members-at-Large
- Twelve (12) Members-at-Large

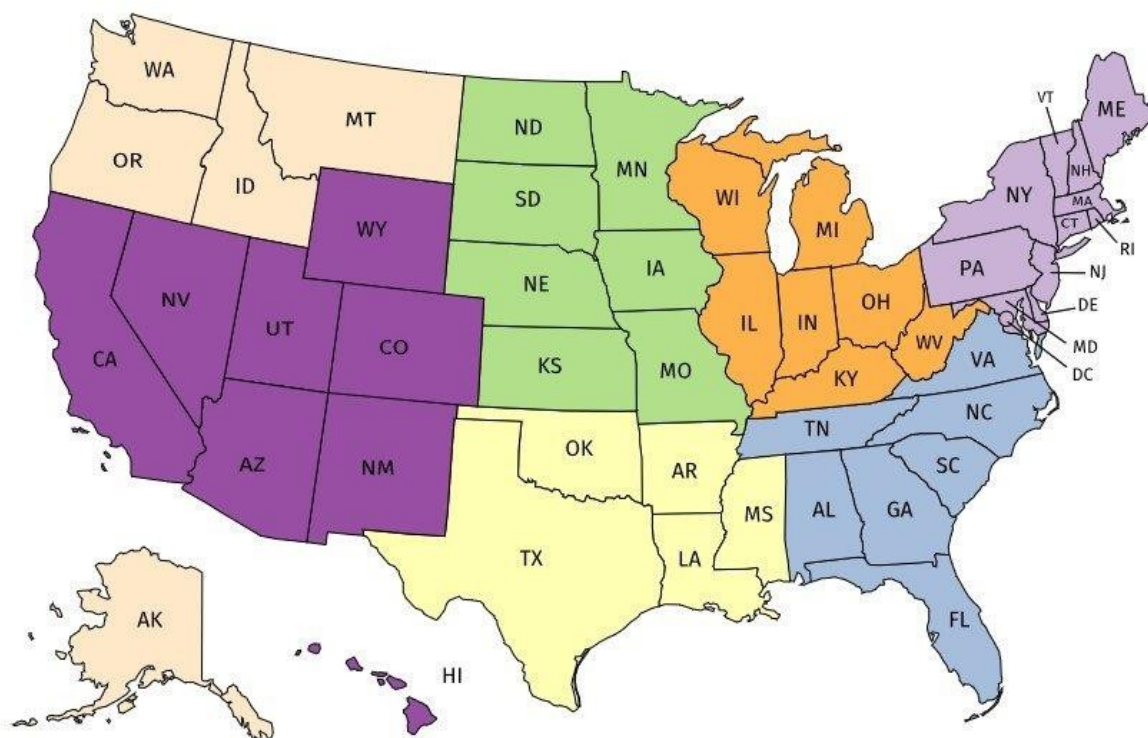
Officers usually consist of three (3) to five (5) of the following - president, vice president, secretary, treasurer (or secretary/treasurer), and legislative aide-editor.

Local Organizations

A local organization has a minimum of four (4) members with elected officers, a local constitution, a National Auxiliary issued charter, and an EIN (Employer Identification Number). Officers usually consist of three (3) to five (5) of the following: president, vice president, secretary, treasurer (or secretary-treasurer), legislative aide-editor, and chaplain.

Member-at-Large (MAL)

Members-at-large consist of three (3) or fewer members from any one town or APWU local.



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

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

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 Jersey,
New Hampshire, New York, Pennsylvania, Rhode Island, & Vermont

The General Officers—Puerto Rico, Virgin Islands, Pacific Islands & Guam

Revised February 25, 2023

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Organizing and Recruiting

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. Any person sponsored by an APWU member, a deceased APWU member, or a retiree from the APWU is eligible to 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 become a member-at-large (MAL). New members should furnish the Auxiliary with their name, address, and local. It is helpful for officers to know your phone number and the name of your sponsoring APWU member. Dues may be paid directly to the National Auxiliary Treasurer or a state or local Auxiliary. Sometimes, dues are collected by other national, state, or local officers. Your dues payment will include national, state, and local, if any.

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 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 four members-at-large or one Auxiliary and eight 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 Organized Auxiliaries

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

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 is 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 lifetime memberships with all privileges to those persons who have dedicated their lives to the Auxiliary. In addition, local and state organizations shall have the privilege of submitting names 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 eligible for full membership. Honorary members shall pay no dues, hold no office, and have no vote.

Extenuating Circumstances

The National Auxiliary Constitution permits membership retention 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 is interested 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 matters, and our members are updated on legislation affecting retirees and their benefits. We also work alongside the union, giving hundreds of volunteer hours to help the union accomplish local, state, and national goals. As a result, retirees can utilize their skills and knowledge and continue to assist union brothers and sisters with projects that interest them. Auxiliary dues are affordable and easily fit into the retiree's 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 specific 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 obtain an EIN from the IRS, pay per capita tax (dues), draft a constitution and by-laws, and policy statement. Instructions follow.



Recruiting Members



Enlisting members is an ongoing project. Many methods can be used for recruiting. For example, contests can incentivize members to invite prospects to join, and resources such as the union's newspaper can be used to publicize recruiting campaigns.

National Officers should train new officers and current members to recruit members. Periodic instruction ensures that everyone is confident enough to present the Auxiliary in the most favorable light. This training should include a discussion of who is eligible to join, who has recently joined, and why they have joined. Recruiters should be able to explain the Auxiliary's purpose and mission and the benefits of membership to new members. Everyone should clearly understand the dues structure and how and to whom dues are paid.

Planned recruitment campaigns usually are 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 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 the rules of your organization. A follow-up procedure should be part of all campaigns.

Methods

- ◆ Telephone in a friendly manner to set up 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 or e-mails, although all are useful.
- ◆ Take every opportunity to invite a prospect to join, including the chance meeting at the grocery store. Maximize any opportunity when a prospect is interested in something the Auxiliary is doing.
- ◆ Invite prospects to a meeting.
- ◆ Involve prospects in a project.
- ◆ Always provide immediate sign-up opportunities after all sponsored events.
- ◆ 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 fundraising
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	Meet new people
Protect your way of life	Fight for a cause
Meet people with similar interests	Accept responsibility
Gain work experience	Personal growth and development
Improve the community	Personal achievement
Utilize special skills	Build self-esteem through accomplishments
Get out of the house	Be aware of your service to others
Learn new skills	Preserve the past
Change the status quo	Put faith into action
Stay active and involved	Be an individual rather than a number
Influence others	Gain academic credit
Use natural gifts and talents	Build self-confidence
Help a friend	Do satisfying work
Empower others	Meet challenges
Be a role model for your children	Be a winner
Give back what you have been given	Social time with friends and family
Show you care	Feel wanted
Fulfill a tradition	

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.

Union Encouragement and Guidance

It is in the union's best interest to help organize and encourage state and local Auxiliaries. In addition, wherever an APWU organization exists, an Auxiliary could help with support at functions to save time for busy union members and officers. For example, some Auxiliary members volunteer time and services in union offices, possibly assisting with editing and producing union newspapers. In addition, auxiliary members frequently help with union human relations projects, fundraising for COPA, and social functions and meetings. These are just a few 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 is a great benefit to individual APWU members. APWU family members learn about postal work and the type of stress afflicting some postal workers. Family members can meet with a sympathetic group who can offer suggestions on coping with early morning or late-night work schedules. Most importantly, family members are informed about issues and legislation that could adversely affect postal families. Finally, 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. In addition, Auxiliary members do not take controversial stands on issues that the APWU doesn't sanction. Finally, although the Auxiliary functions independently from the union, electing its 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 local 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 them 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 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 a membership in the Auxiliary. These are just a few possibilities for promoting and encouraging Auxiliary membership.

Guiding and encouraging Auxiliary officers and members pays big dividends to APWU organizations. Indeed, 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 you can order from the National Auxiliary Secretary. In addition, you may wish to read through suggestions for public speaking in Chapter 5 of this handbook. All the information you need to discuss the benefits of the Auxiliary can be found in this handbook.

A Basic Presentation Outline

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 ongoing recruiting.
- B. Talk about the importance of encouraging 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!
- ♦ Hand out brochures and flyers.
- ♦ Speak with potential members individually after the presentation and ask them to join.
- ♦ Erase stereotypical images of the Auxiliary.

Payment of Per Capita



Per capita is commonly referred to as dues. National per capita is \$5.00 per member per year. The state and local organizations may add additional dues. Per capita is due in advance and may be paid annually or for multiple years. 100% Auxiliaries may pay monthly, quarterly, semi-annually, or annually. State treasurers should send only **national** 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
- ◆ E-mail address
- ◆ Sponsor's name (APWU member)
- ◆ Local and state where sponsoring APWU member is a member
- ◆ Date joined
- ◆ Dates of membership

State treasurers are responsible for promptly collecting dues from all members in their respective states and forwarding the per capita to the National Auxiliary Treasurer. 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 its own EIN. You must have an EIN to open a bank account for the organization. Do not share numbers or 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 the 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 the IRS form SS-4. You can obtain the 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.

Auxiliary Answers for Completion of SS-4

Line 1	The name of the organization. Use the exact name as it will appear on your charter.
Line 2	Skip
Line 3	This usually is the Treasurer.
Line 4a -Line 6	Self-explanatory.
Line 7	This is either the Treasurer or President, usually the Treasurer.
Line 8	Check "other nonprofit organization." (Specify) 501(C) The "GEN" is 1015
Line 9	Usually, you will be starting a new business. If you are unsure about this answer, call the National Auxiliary Treasurer.
Line 10	The date you requested a charter or organized.
Line 11	See the instructions.
Line 12	Normally this is not applicable and should be annotated by placing N/A in this block.
Line 13	Normally, this is not applicable and should be annotated by placing N/A in this block.
Line 14	The Objectives (Article II) in the Auxiliary Constitution are considered the principal activities of this organization.
Line 15	Answer "no."
Line 16	Answer "N/A."
Line 17a-c	You must answer this based on personal experience.

- ♦ The Treasurer is usually the person who will sign and date this form. After completing this form, 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, and how the officers are elected. Also, how long they serve, the officer's duties, 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. In addition, it generally states when and where the meetings will be held. For example, meetings are held on the first Monday of the month in the members' homes, with a schedule of locations to be determined.

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

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 must be submitted and how the Treasurer will reimburse officers and members for incurred expenses. In addition, the policy statement may list additional duties for the officers.

Whereas the constitution states expectations *generally*, the policy statement states instructions and expectations *specifically*. The membership need not approve this document, but it may not conflict with the local constitution.

The National Auxiliary recommends that all state and local Auxiliaries have policy statements that give officers clear instructions for fulfilling the duties assigned to them by the governing constitution. In addition, the National President or the National Secretary can provide sample policy statements used 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. Specific requirements must be met to be considered organized enough to receive a charter. The requirements are fully described in Article IX, 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 and a listing of elected or acting officers and charter members with addresses. A charter cannot 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 received a charter, it 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 the National Convention but are accorded the same voting power prescribed for members-at-large in Article V, Section 2(B) of the National Auxiliary Constitution.

Suspended Auxiliaries must surrender their charter. An Auxiliary is suspended when it is delinquent in paying membership dues (per capita tax). Any Auxiliary affiliated with the parent body that fails to pay its per capita tax on the due date shall be notified by the National Treasurer after three months and 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).

With the advice and consent of the National Auxiliary Executive Board, the National President 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).



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 objectives (found in Article II) and membership requirements (Article III, Sec.1a). Some parts will not apply at the local level. For instance, local Auxiliaries do not have their own conventions but send representatives to them. Some parts may or may not apply on the local level. An example of something that might not apply is an 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 entire membership. The committee members should read the National and appropriate state Auxiliary constitutions. All organization members should be informed in writing of the meeting to 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 lift these sentences verbatim and insert them properly 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 likely be a simpler version of the National Auxiliary Constitution.

What if you disagree with the wording in your National or state Constitutions? The National and state Auxiliaries are democratic organizations that depend upon your input for sound, reasonable language 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 writing a constitutional resolution. Once your membership approves 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. Therefore, all local Auxiliaries should review the local constitution after each National Convention. National Constitution revisions are typically reported in the News and Views newsletter. 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. Finally, anytime the local constitution is revised, a new revised local constitution should be sent to the National President for approval.

Revisions to the state Auxiliary constitution may affect the local constitution. In this case, the local should make revisions that apply whenever a conflict between the state and local constitution arises. In addition, from time to time, local Auxiliary members may choose to amend the local constitution. Once again, the revised constitution should be sent to the National President anytime the local constitution is changed.

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Officers Elections and Responsibilities

National Officers

President

Trisa Mannion

Secretary

Karen Wolver

Treasurer

Janeil Payne

Legislative Aide-Editor

Janice Gillespie

District 1 Coordinator

Brooke Schilling

District 2 Coordinator

Roxanne Heckman

District 3 Coordinator

Kathryn Walker

District 4 Coordinator

Debra Stewart

District 5 Coordinator

Barbara Maciejewski

District 6 Coordinator

Arline Holmes

District 7 Coordinator

Lisa Beer

Committees & Special Assignments

Bridge Builder Committee

Organizing Committee

Election Committee

Scholarship Committee

Human Relations Committee

Health Plan Liaison

Memorial Service Committee

Retirees Liaison



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 abilities and character to guide their organization.

Elections

Conducting 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

The President appoints the election committee. 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 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 thirty days 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 Rule of Order" for a detailed explanation and a question and answer section on nominations.

Election Procedures

Secret ballots are 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 at 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.

Run-off Elections

A run-off 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

The election may be contested if serious violations occur in the election process. Each constitution should have a method of contesting elections. The National Constitution would be in effect if the affiliate organization does not have a procedure.

Union Elections

Auxiliary members should 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, Articles VI and VII.
- 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. Article 5, Sec. 1 (B): "In order to be seated as a delegate 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 Tuesday 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 before publication. Contact the National Auxiliary Editor for information regarding publication dates.

Nominations

Nominations will take place as the last order of business on Tuesday afternoon. (By-Laws, Article VII, Section 2). 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 referring to a member's creed, color, sex, nationality, or political affiliation shall be permitted 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 their 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.

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

Auxiliaries may not use funds from dues, assessments, or similar levies to promote a person's candidacy.

Elections

Elections shall be on Wednesday afternoon of the National Convention (National By-Laws, Article VII, Sec. 5). 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 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 communication 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 regularly.
- ⇒ 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 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.

- ⇒ 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 your state's or local Auxiliary's Constitution. Therefore, you should begin your term of office by reading your Auxiliary constitution and becoming familiar with 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. The Secretary must be prepared to preside in the absence of the President and vice president.

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., (see Audit Procedures For Affiliate Organizations in this chapter of the handbook).
- Order supplies from the National Secretary.
- Keep a correct listing of current officer's 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 conventions 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.





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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 or e-Postcard

DO NOT IGNORE CORRESPONDENCE FROM THE INTERNAL REVENUE SERVICE!

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

All state and local Auxiliaries must file unless your income is greater than \$50,000 per year. All organizations with income over \$50,000 must file Form 990. For additional information, see this site
<https://www.irs.gov/pub/irs-pdf/i990.pdf>

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 of 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

<https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard> is the address of the site you will need to use to file the e-Postcard with the IRS. 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 it 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.
- ◇ Print the "View Form 990-N (e-Postcard)" page.
- ◇ Send a copy of the acceptance and the viewed form to the National Treasurer.

Audit Procedures For Affiliate Organizations Audit

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 necessary that the committee members have some familiarity with the nature and scope of operations before they begin their assignment. The following procedures should provide the required 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 on the organization's needs. 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, not 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.

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 from the National Auxiliary, members, and/or locals?
- Have all disbursements been appropriately authorized, as required by law, minutes, and the constitutions?
- Are disbursements supported by adequate documentation, i.e., receipts, vouchers, and signatures?
- Is the local/state compliant 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 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 affiliate's 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 report and complete their assignment. 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 checklist 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 receipts, 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 the 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, fundraisers, 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, and 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 number 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 needed for the appropriate wording.
- A listing of exceptions requiring corrective action and recommendations for how such corrections can be carried out. In most instances, retrospective corrections will not be required. Instead, the recommendations will be prospective; that is, they will suggest future procedures and safeguards to avoid needless repetition of prior difficulties.
- A conclusion expresses 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 regarding 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 dissatisfaction. 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.

Suppose the exceptions are of sufficient number or are of such a nature of dollars or magnitude. In that case, the Committee may conclude that it is necessary to enumerate the exceptions encountered in the written report. Material exceptions should be specified but briefly described. Numerous minor exceptions may be identified as a class rather than individually listed. If remedial action is required, that should be noted. If corrective action is needed, the Committee should issue a supplemental report that discloses whether or not the recommended actions were taken and the consequences of those actions.

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 possible, the report should state the necessary steps 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 that the Committee will find itself reporting on a condition that, while unsatisfactory, is not susceptible to remedial action. In such an instance, the Committee may find it necessary to state that it believes that a 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 2025—the e-postcard form 990-N was added in March, 2008



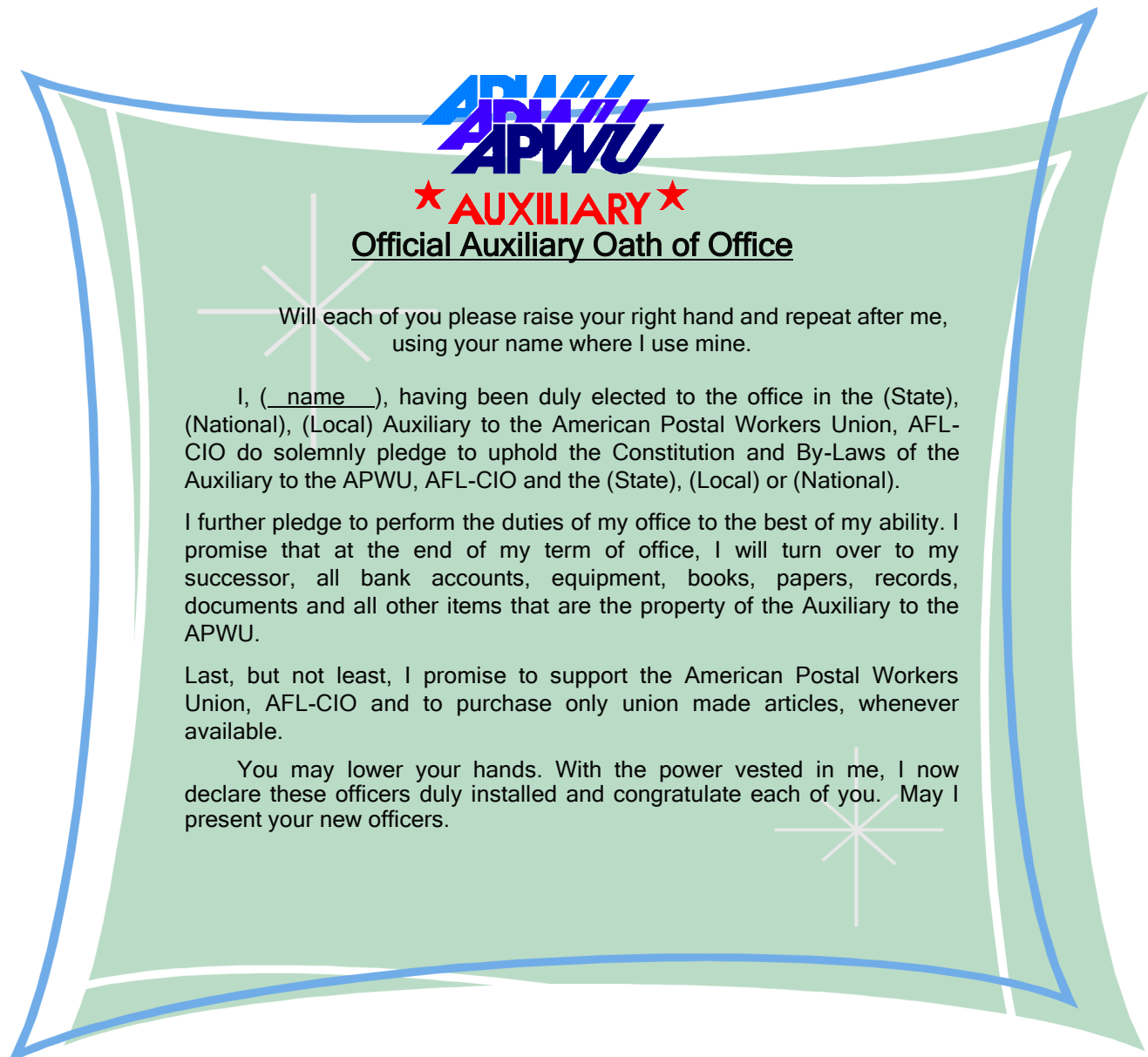
Auxiliary in Action!



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, 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 Pledge, speeches, poetry, music, and/or special presentations. Watch a Presidential Inauguration for an example of a formal installation that incorporates most of these components.

While no Auxiliary is required to hold an installation, there are several reasons for having one. An installation honors newly elected officers impresses the office's responsibility 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.



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Chapter 4

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Running Effective Meetings and Parliamentary Procedures

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 participate.

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 consist of 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 challenges to make working towards it worthwhile. Finally, it should tie directly back to the organization's primary purpose.

Examples

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

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

*The objectives relate directly to the established goal! The objective statement also begins with the word "to", 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 what is needed and when to accomplish the goal. It is realistic and attainable, yet challenging. It is consistent with the available resources and organization rules, policies, and practices.



Making the most of meetings cont. on next page

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 five 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 the 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 ensuring that the organization has written goals (and objectives), goal setting should be a function of the entire membership. The process should involve all affected by or interested 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. Proper goal setting takes time and concentration. It is best to call a special meeting or retreat where 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, prioritizing, and formulating the goal and objective statements. Even if you fall short of fully realizing your goals, by implementing and following through on this process step-by-step, you will know at what point and by whom the proverbial ball was dropped. Then, you can revise your strategy 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 addressed. It is typically the responsibility of the President or chairman to prepare the agenda. Every agenda should have the Auxiliary's name and the meeting's date as a heading. It may be desirable at some meetings of Auxiliary members to include the Auxiliary Pledge and Pledge of Allegiance to the flag. These would usually be done at the start of the session.

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

Name of Auxiliary and/or Name of Committee

Date of Meeting

- Auxiliary Pledge
- Pledge of Allegiance
- Roll Call of Officers and members
- Reading of Minutes of the 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 tools 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 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 typically 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 (might 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 a 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 to make members feel welcome and important. One way to do this is to include all members in business discussions. 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, recognizing members' accomplishments, and 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. Also, following parliamentary procedure or Robert's Rules of Order is desirable. The Auxiliary uses Robert's Rules of Order at most state and national conventions. Many locals use at least an 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 precedents. 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. Making motions to hear reports from officers or committees is unnecessary, 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 chairperson) by raising a hand or going to a microphone. Then, the member should address the chair by saying President (or chairperson) and wait to be recognized. When the President has recognized the member, the member states: "President, I move to...". Motions are recognized in the order of precedence. There are three types of motions: privileged, incidental, and subsidiary.



Privileged Motions

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 may not be debated. There are only five (listed in order of precedence): fix a time to adjourn, adjourn, recess, question of privilege, and call for orders of the day (or order of business). The three privileged motions most widely used within the Auxiliary are adjourn (at the end of a convention or meeting), recess (for lunch or the day), and the question of privilege. The question of privilege is often used to rectify a condition within the room.

To bring up a question of privilege, the member asks for recognition and then states, "President, point of personal privilege..." or "President, I rise to a question of privilege..." Common uses at meetings are to 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

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.

- 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, "President, Point of **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.
- 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.
- ◆ 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, "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, "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, "President, I withdraw the motion."



SUBSIDIARY MOTIONS

Subsidiary motions are the most frequently used. Their purpose is to modify or suppress the main motion. They precede 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.

- 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 extend previously agreed-upon rules of debate. Say, "I move we limit/extend debate..."
- Postpone to a definite time: used to postpone the debate. Say, "I move we postpone the debate until..."
- Refer to Committee: Used to send a motion back to the committee when the motion requires so much amending that it would waste the members' time 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), and 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 EXAMPLES

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.

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.

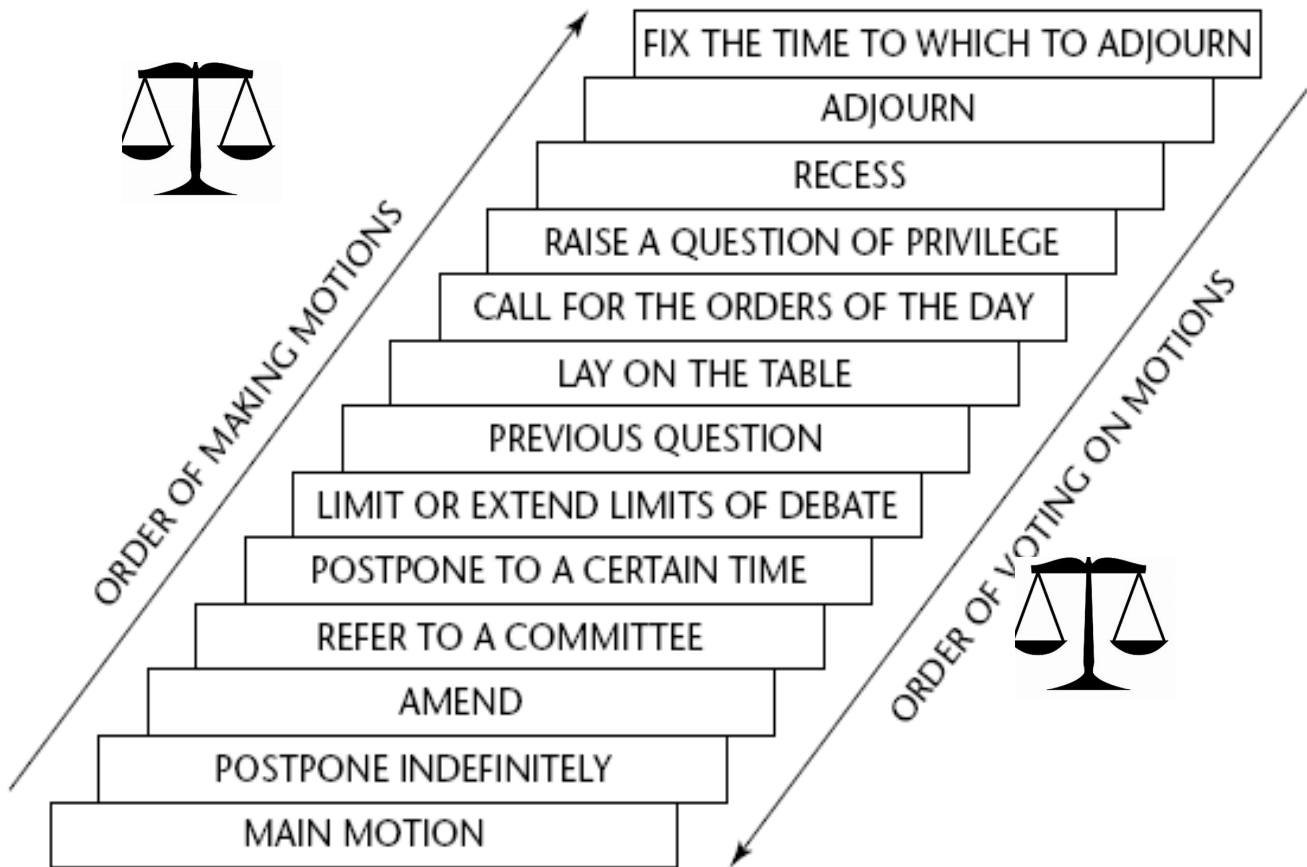
Workshops are also offered on this Subject by National Officers

The diagram on the next page, 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.)



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.*



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 your 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.
- Follow up in writing with a 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.



Chapter 5

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Auxiliary Objectives

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 result from helping 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 grievances, enter data into computers, and assist with general office work and maintenance. Some Auxiliary members assist with the editing and producing of union newspapers and participate in Postal Press Association functions. In addition, auxiliary members help with union human relations projects, 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 buying 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 the 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. In addition, Auxiliary members do not take controversial stands on issues that the APWU doesn't sanction.
- Wherever an APWU organization exists, an Auxiliary member could help with any office work, program, or function in which the APWU is involved. Therefore, it is in the union's best interest to organize and encourage the state and local Auxiliary to maximize the whole family's participation 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 past, present, and Future gap.



In addition to the school curriculum, the Auxiliary uses sources from "Labor Heritage" magazine and various websites to communicate these efforts of our labor forefathers to our membership. Regular articles in the "News and Views" highlight 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 workforce. 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 relations, 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 cooperating; "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 workforce with few, if any, benefits. They want to lower salaries, provide no medical insurance, offer no vacation leave, etc. It looks like a revival of the early 1900s. Children have the strongest sense of right and wrong; labor education reinforces that. The Auxiliary prioritizes educating young and old alike.



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.
- Rent or borrow DVDs 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 videotapes 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 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 events. 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, the availability of facilities will dictate the possible dates for the event. When selecting a date, the committee should also consider maximizing attendance. For example, an event planned on the evening of a major sporting event or a holiday when members are out of town will result in poor attendance. A theme 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 President's luncheon, or holidays can be a time for extravagant, lively parties and seasonal music.

Committee members may wish to divide up planning tasks. For example, a social chairperson should take 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 provides 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, food quality, price range, and ease of service, then choose arrangements to make a successful occasion. Finally, consider catering and investigate the cost.

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

Room and table decorations should be artistic yet unobtrusive. Nothing is more aggravating than having interesting dinner guests at your table and not seeing 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 needing a head table, 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 sitting at the right. If a speaker of ceremonies is present, they sit 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. Again, consider using place cards to avoid confusion.

Membership luncheons are acquaintance builders. Luncheons can be informal or formal, depending on your members' preferences. New member prospects may be more comfortable in a relaxed setting, requiring less participation.

The social committee chairperson ensures everyone is comfortable and new members and guests are welcome. The President is often quite willing to assist with these duties. Please use the same tact and grace you would use in your home.

Preparing for Registration

Registration is an integral part of conventions and meetings. Registration allows the Union and Auxiliary the means to keep track of those in attendance and how to best plan for the occasion. Sometimes, one may register by letter or return a registration form to the registration or convention committee by a specific date. Registration for district, local, and other general meetings usually differs from convention registrations. 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 precisely what will be expected of you. When will the table be open for business each day of the meeting? When will the Auxiliary be expected to work? How many people will be needed to staff 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? Are there any preparations, such as helping with name tags or meeting bags? If registration runs through mealtime, 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 undoubtedly come to mind as you plan for 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, printed, or handwritten. Usually, attendance is also taken at the registration table. A simple way to take attendance is to have everyone sign in. Taking addresses, phone numbers, and the names of those attending is a good idea.

Some meetings have registration fees. Fees are determined by the local hosting the meeting or by the state organization. Registration fees usually cover the costs of the meeting and may include workshop materials, meals, hospitality, and entertainment, depending on planned activities. You will need a cash box with change, a receipt book and pens, and a calculator to collect registration fees. 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 scheduled for a large gathering.

If the meeting is large, enlist the assistance of the Chamber of Commerce. They may help provide meeting bags, maps of your community, and name tags. They may also provide equipment for your registration table.

Proper 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

How to get Started



Determine if your area's Postal or Federal installations are planning to sponsor Open Season fairs. You can call the Marketing Programs Coordinator during 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 with the information.

Coordinate your health fair participation with state and 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, 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 talk 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. Once you receive the information, you must call the Marketing Programs Coordinator to get approval to attend. If the health fair is not approved, the Plan will not reimburse you for parking, tolls, etc.

If facilities in your area do not have health fairs, you may try to initiate some marketing activities 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 merely 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, work areas are off-limits to non-employees

What to do 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. First, try to arrive at the health fair early. Tables are often not assigned, so the earlier you arrive, the better chance you have of getting a visible table (e.g., by the main entrance to the room). Once there, introduce yourself to the person running the health fair and answer any questions they may have.

When you get your table, set it up. To help identify the Health Plan, use a table sign or poster. Place literature and the "giveaways" on the table in an attractive way not just scatter your goods across the table. The more aware 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 interesting. Below is a list of Do's & Don'ts for a health fair.

The Plan's flyer has a Benefits Summary Chart that is very helpful. By following these simple "Do's and Don'ts," you can ensure a successful Health Fair!

Target the prospective members for what they may need. Ask questions of them. If you speak with a younger person, ask if they have children. If so, talk about well Child and Immunization benefits. If they have no children, discuss the Wellness benefit.

The Health Plan options include High Option and Consumer Driven. Please familiarize yourself with the options each year as they change. Benefits and options change and are approved by the Office of Personnel Management (OPM) ...The Plan has at least one benefit that is attractive to each person-often, many attractive benefits.

If your area has a Preferred Provider Network, the prospective members can visit the website at www.apwuhp.com to see if their 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 PSHBP carriers. They do not saturate the television and radio airwaves with commercials. The Plan relies on its employees and associates (Auxiliary Members, Officers, and Health Plan Representatives) 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 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?

APWU Health Fair

What Supplies will I Receive to promote the Health Plan?

- A Few Federal Brochures
- Informational Sales Flyers
- “Give away” items

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 the 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.

**TOGETHER.
BETTER HEALTH.**

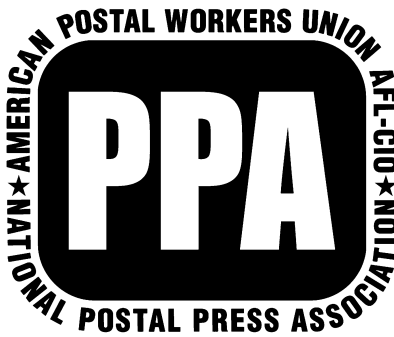
Get comprehensive health benefits at an affordable price.

APWU
HEALTH PLAN

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

Auxiliary members can assist the union 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 find out what services union workers offer in our town and when we travel. When union-made products and services aren't available, we can purchase products made in the U.S.A. and services provided 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 publishing APWU local and state newspapers. Some of these Auxiliary members and 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' spouses are eligible to file a membership application. In addition, auxiliary members may be asked to help distribute information about the Accident Benefit Association (ABA) occasionally. Many Auxiliary members are also members of the ABA, and the Auxiliary firmly supports this vital organization.

Voluntary Benefits Plan

Services offered under the Voluntary Benefits 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 involve caring, reaching out, and involvement. Human relations is a fundamental founding principle of the Auxiliary. Webster defines the very word Auxiliary as "providing help or assistance." Before the merger of 1971, there were five postal unions and five Auxiliaries. Each of them had a constitution. After 1971, these five unions and Auxiliaries merged to form the American Postal Workers Union and Auxiliary. History-clear back to 1917 details Auxiliary members' involvement in human relations projects. These founding organizations were organized because of low pay, poor morale, and poor working conditions within the Postal Service 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 promoting harmony and cooperation among people.

Auxiliary members believe each individual has specific needs and that people differ in what they consider essential. We respect human dignity and agree that everyone must be treated accordingly. A necessary feature of the Auxiliary constitution is the *Member's Bill of Rights*, which outlines these principles. We understand that people are interrelated, that no one lives in a vacuum, and that what one person does usually affects someone else.

Auxiliary human relations projects often contribute to basic subsistence for some families. It is gratifying work, 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. Therefore, the Auxiliary supports formal education and informal information sharing that expands our understanding of safety and health issues, positive conflict resolution, and other matters affecting 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:** Helping with local meetings, answering the phone at the union office, helping with the newsletter, and serving a retiree's 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, fundraising 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 education is key to opening the door of opportunity, enabling people to advance, and enriching lifestyles. Education helps people develop the skills necessary to improve themselves 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 awards 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 requiring both spouses to work to provide necessary income. Unfortunately, this need often demands additional training for many people, which is not within their family's financial budget. The Auxiliary is very proud to assist those persons through 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 the scholarship application. National Auxiliary Executive Board members and their immediate families 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 contributions. The National Auxiliary intends to continue awarding scholarships as long as there is a need.

Instructions and forms can be found on the website.

PATRICK J. & SALLY NILAN SCHOLARSHIP RECIPIENTS

1990-Ruby McGartland, Quincy, IL	2005-Jenna Wong, Daly City, CA
1991-Jennifer Thomas Marks, Aberdeen, SD	2006-Jenna Wong, Daly City, CA
1992-Delores E. Smith, Gainesville, GA	2007-Joan Anderson Mertz, Lincoln, NE
1993-Michelle A. Willard, Florissant, MO	2008-Letty Reyna, McAllen, TX
1994-Not Awarded	2009-Christy Lutz, Portland, OR
1995-Judith Neff, Phoenix, AZ	2010-Charlie Cash, Salt Lake City, UT
1996-Mark Kirkwood, Provo, UT	2011-William Martin, Portland, OR
1997-Edna Burt, Casper, WY	2012-William Martin, Portland, OR (not accepted)
1998-Terri L. Major, Auburn WA	2013-Leslie Carney, Tucson, AZ
1999-Amy Lovell, Bumpus Mills, TN	2014-Erica Cole, Salt Lake City, UT
2000-Jason Hendrickson, Twin Falls, ID	2015-William P Martin, Tigard, OR
2001-Yolanda Vidal, San Antonio, TX	2016-2022 not awarded
2002-Theodora (Erica) Mitchell, Sutton, NE	2023-Erin Kolenda, Austin, TX
2003-Kim Merow, Springfield, OR	2024-Makayla Walker, Columbia Heights, MN
2004-Melinda Lowry, Mansfield, OH	

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.



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 comfort our country's low-income and homeless people. Unfortunately, there are too many people without shelter or enough food. The need becomes greater as our government cuts back on entitlements and assistance. The National, state, and local Auxiliaries and APWU organizations across America are collecting food, non-perishable items, and money to help assist those community members with the greatest need. Various fundraising ideas are listed in the fundraising section of this handbook to help Auxiliaries raise money for this program. In addition, 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 contributing through time, effort, and sacrifice. All across the nation, Auxiliary organizations are involved with projects that provide warmth through coats, hats, scarves, and gloves. "Baby showers" for birth crisis centers are always welcomed. We volunteer in disaster relief situations, providing for our deployed troops and working in Veterans centers. The need is great. The opportunities are endless. The satisfaction of helping others in need is 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 the convention's local host to determine which community organization will benefit from the project, work with the 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 the presentation at the convention, and arrange for someone to take photos. The state human relations officer should confer with other 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.



Bridge Builder Award

The Bridge Builder Award is a prestigious award. Only one person per year, per state, is eligible for this award. Likewise, only one award is given to a person per lifetime. It is to recognize those who have, and still are helping the Auxiliary and the Union, are active in Human Relations, Legislation, Political Action, Public Relations, Organizing, or Recruitment. It is for Auxiliary and APWU members who excel at supporting or are active in the areas mentioned. It is also meant for those not generally recognized for their outstanding contribution to this organization and our goals.

The guidelines are clear and concise, but if you don't understand something or have a question, contact any of the Executive Board members, and they will happily answer them.

The guidelines form can be found at www.apwuAuxiliary.org. When filling out the form, remember that someone is reading this for the first time, so please write legibly. Type or print your information, so we will get it correct if they win and can correctly print the award certificate. Getting accurate information on the certificate is important to avoid hurt feelings or embarrassment.

The deadline for the Bridge Builder Award will be here before you know it, so we want to remind you if you know someone who is a member of the APWU or APWU Auxiliary and who fits the criteria for the award, send their name for nomination. We know we have members who are valuable to you in the organization, and you can show them how much they are appreciated by doing this. So don't wait for someone else to send in the name. If you know someone who deserves this award, send it in.

Please read the guidelines and send the nomination form to us. Remember, you must be an Auxiliary member in good standing to nominate someone. The deadline is December 31.

A complete list of past Bridge Builder award winners is available on the website:

www.apwuauxiliary.org or by request to:

Secretary Karen Wolver at kwolver@apwuauxiliary.org



Books for Young Readers

All over this country, there are youngsters who want to learn to read. They need our help. Many young children do not have access to good children's books. Some don't have people who will take the 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 public daycare 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. Another way Auxiliary members can participate in the fight for literacy is by volunteering 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 a shelter for abused women and children. So often separated from other family members in unfamiliar surroundings, who or what is there to cling to and 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 them. 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. So 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 then, hundreds of teddy bears have been donated to shelters, crisis centers, hospitals, and other areas of need throughout this county. Local and state organizations have embraced this project to bring joy and security to a child in a 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 Fun

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. The Hallbeck Scholarship program began in 1995 and was expanded from five scholarships to ten, awarding two in each of five geographic areas.

The Auxiliary promotes and supports the Hallbeck Scholarship through fundraising 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 Master Cards revert to the scholarship fund, and a percentage from each MasterCard renewal.

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

Other Nationally Supported Programs

The National Auxiliary observes Breast Cancer Awareness Month and Child Labor Awareness. Some of our past Human Relations Projects are Fisher House, Wounded Warriors Amputee Softball Team, Children Incorporated, the Backpack Program, and Peace in Heavenly Peace.

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

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



Legislation and Lobbying

An essential 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 the passage of legislation that will bring Postal Workers better working conditions and a higher standard of living.

The primary source of information about legislation affecting postal families is the APWU Legislative Department. Information from this Department is published in various 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. In addition, 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*. Discussing issues at Auxiliary meetings is important so all members are informed and understand them.



Surveys show that 90% of American adults have never written a letter to a Congressional Representative, yet letter writing is one of the most influential and persuasive forms of lobbying. Certainly, letter writing is one of the easiest and least expensive lobbying methods. Congress members are interested in what their constituents think. After all, those constituents are the voters in elections. Yet, 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 the Members of Congress. You let them know the importance of that issue to you and your family. What's more, many other voters probably feel the same way. Letters may congratulate a legislator for a position the 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 also discussed in this section of the handbook as the proper way to write a letter to a member of Congress. So exercise your freedom as an American citizen, and let your legislators hear from YOU!

Lobbying

Making personal contact with Members of Congress

Whether it is in Washington, D.C., or your hometown making a personal telephone call or visit to your Senators and Representatives 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 Representatives have an aide assigned to postal and federal issues. Ask for that person's name and meet with them if your representative is unavailable.
- Before your meeting, send a letter detailing the reason for your visit, the issues you wish to discuss, and who you represent. They will often 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 for their response and encourage them to consider your concerns. Request a response in writing to follow up on the meeting.
- Take notes and keep a log of the activity. Record the date, time, who accompanied you to the meeting, the issues discussed, and the meeting results.

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. Our responsibility is to secure publicity and create sentiment for the APWU membership. Often, legislation that may be beneficial or detrimental to the APWU family and their standard of living is introduced. 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 were enacted.

Aside from rallying the support of our members and their families, it is crucial 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 to vote for or against it. Every letter represents a potential vote for the Representative. The more mail and communications their office receives, the more the legislation is considered.

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 typed communications. Email and other forms of electronic communication have also become very efficient and accepted forms of communication.

Just remember, make it personal and direct, and ask for a response. Do write your Representative and Senator. They are your employees hired by you as a result of the previous election. As an employer, you are responsible for keeping tabs on the issues and how they will affect you as individuals, a union family, and a community. For your Representative to make informed decisions, you must give them your views on the issues. Congress wants and needs your thoughts.

How do we write these letters?

There are a few simple guidelines, on the next page, to aid you in the process.



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.

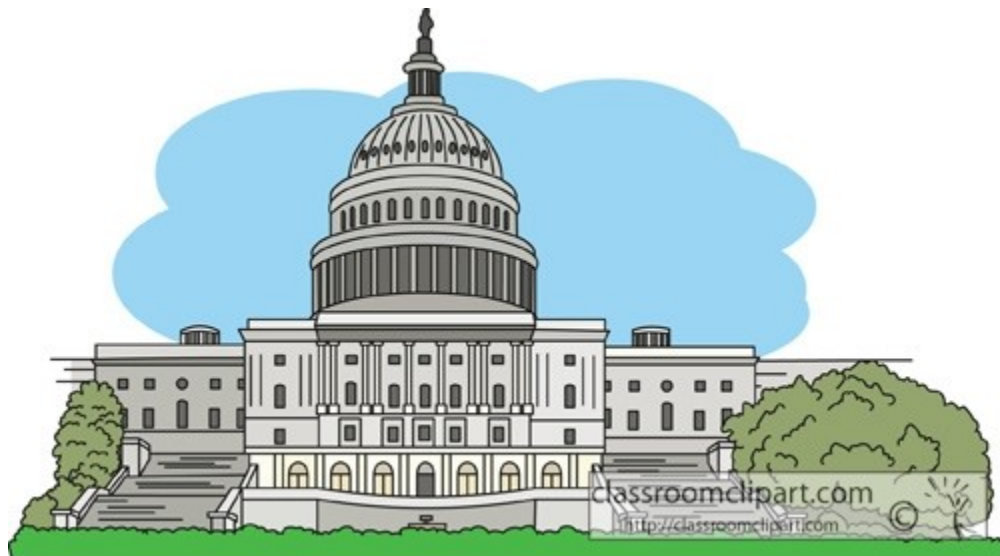
Do be courteous. Abusive or demanding attitudes are in poor taste and very poor psychology.

Don't make a promise or threat of political support or reprisal,

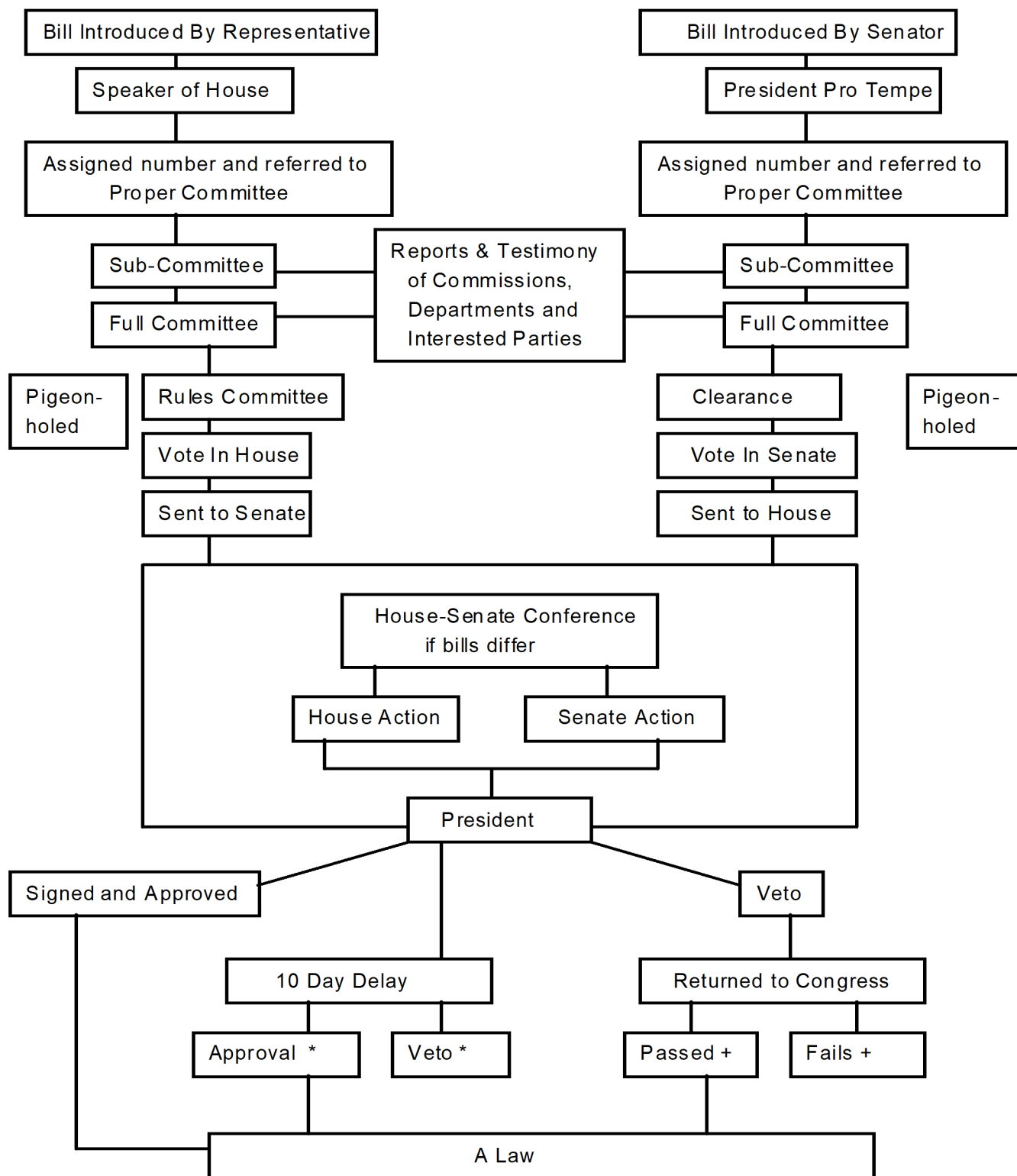
Don't make wild statements that are not susceptible to proof.

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 you 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 genuinely 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: fundraising for the APWU political action fund (APWU COPA) and direct involvement in political campaigns.

Auxiliary members must follow the APWU Strategy for COPA Fundraising, which can be found in the fundraising section of this handbook. In addition, strict laws must be followed concerning fundraising for candidates and PACs. 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 work for. Then, the Auxiliary member can meet the county campaign chairperson 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 fundamental 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 participate actively in the political process again. 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 shared family responsibility. This involvement will engage us in electing individuals who represent our causes - a refreshing change and one filled with tremendous responsibility.

As a grassroots volunteer, you will be charged with various activities. What work is too menial? None. By the way, don't expect to be paid. What can you offer? As APWU & Auxiliary members, you can provide invaluable services every political campaign needs. For example, some of you know the operation of the USPS. Bulk Mail regulations seem tedious, but a little knowledge is valuable. Knowledge of the sortation, mailing statements, and verifications is part of the skills. Your expertise in helping in all aspects of mailings is needed.

Grassroots activities can also extend into these areas:

- Walk for your health and canvas neighborhoods by placing fliers on doors.
- Put up yard signs - and after elections help take them down.
- Stuff, address, 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 someone will knock your door down, you will be disappointed. How do you get your foot in the door? Make several phone calls to schedule 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 start with baby steps, and soon you will be leaping forward.

Above all, maintain everything 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 contribute 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 fundraising drives for a partisan political campaign. APWU COPA bridges that gap by making these political action contributions. This fund comprises of voluntary contributions from APWU members 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 EFT 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. As a result, auxiliary members do various fundraising activities to support this fund. Auxiliaries involved in COPA fundraising projects must follow the APWU COPA strategy fundraising guidelines in this handbook's "Fundraising" section."

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, zip, E.I.N, or last four numbers of your Social Security number, contribution amount, and check number.
2. Make sure you have the individual COPA forms. You can find them on pages 115 and 116.
3. Number each sheet in the upper right-hand corner. Total each page of contributions individually. It helps to keep the contributions on each page. Make a cover sheet to produce a grand total of all individual lists. Keep a copy of all pages for your records.
4. Contributions should be sealed in an envelope. At least two individuals should count the contents, and both should sign across the envelope's seal. Report the collections to the state and/or local organization.
5. Group contributions should be mailed by certified or registered mail, return receipt requested, to:

**APWU COPA
Contributions APWU Accounting Department
1300 L Street 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 donate 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 fundraising activities.

Creating Positive Public Relations

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

Our members are involved in public relations just about every day. We should advocate for our organization everywhere: at Auxiliary meetings, committee meetings, union meetings, and conventions, at work, at home, or at school. If we all work together, we can present a positive image of the Auxiliary, the union, and the 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 how we answer the phone, how prompt we answer our mail, how courteous we are to people we meet, and how open we are to other people's ideas and needs. Remember that if you are going to achieve a positive image, you must always communicate a positive message. Good public relations is comparable to good salesmanship!

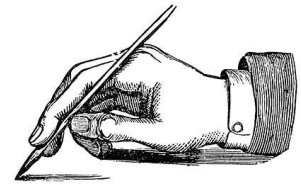
The following pages contain information meant to help you sharpen your communication skills. Don't be afraid to develop and use your talents!



Make Your Voice Heard

Auxiliary News & Views

The Legislative Aide-Editor publishes the National Auxiliary News & Views. It is printed and mailed out bi-monthly in odd-numbered months. At least one copy is mailed to each 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 15th of each even-numbered month 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

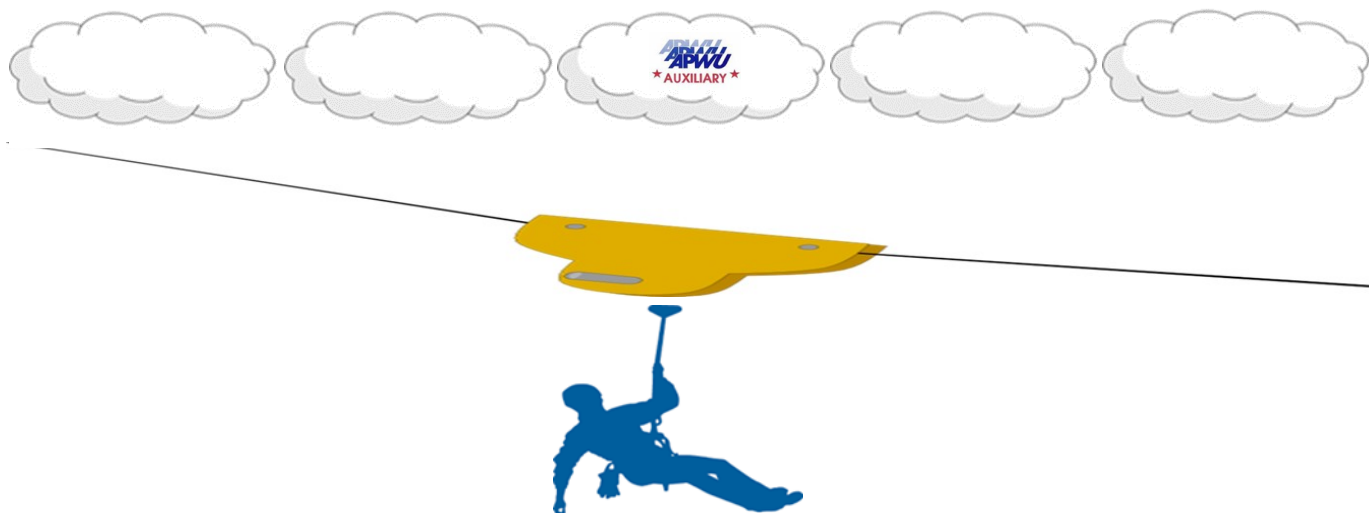
As a major source of communication, this magazine is mailed bi-monthly to each member of the American Postal Workers Union, AFL-CIO. Edited and compiled by the APWU, it contains legislative updates and information, communications from the National APWU President, and each department of the APWU. There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

The National Legislative Aide-Editor is responsible for the Auxiliary section of this publication. *Therefore, 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 delay publication as all Auxiliary material received at the 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 to resemble a news article rather than a column.

Photographs can be published. Send photos or digital picture files with captions identifying each individual in the photograph. With the advent of digital photography, we can submit pictures via the internet. That makes them very timely. Send a copy of the photograph rather than the original. Include a note with your name, address, city, state, and zip if you wish to have pictures 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.



How would you like to zip line without leaving home?

Join Us for a Zip Line Meeting

WHEN: 1st Tuesday in even months

TIME: 8:00 Eastern Standard Time

RSVP: Trisa Mannion-President

tmannion@apwuAuxiliary.org

An email will be sent with instructions on how to join in on the meeting

This is the perfect way to become more involved in your **APWU Auxiliary** and you get to cross zip lining off your bucket list.

(We won't tell anyone that you did it from your sofa)

Join from PC, Mac, Linux, iOS or Android:

<https://zoom.us/j/368309307>

Or iPhone one-tap : US:

+16699006833,,368309307# or

+16465588656,,368309307#

Or Telephone: Dial (for higher quality, dial a number based on your current location):

US: +1 669 900 6833 or +1 646 558 8656

Meeting ID: 368 309 307



LET'S TALK -

Effective Communication Skills for Auxiliary Members

One of your primary 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. Therefore, our communications should reflect our current Constitution, policies, and projects. Attacking the matter in three parts is essential.



Know Your Subject

Researching your topic from a variety of sources is the best preparation. Whether 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. For example, journalism class teaches you to ask six questions for each article. You have sufficient information for your subject if you can answer these questions. 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 sure to let your audience know these are your ideas. However, if the communication is to be objective, try to remove your views 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 is usually 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 5ws and the h? Do you like the slant you gave it? Is it objective, persuasive, or editorial? 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. On the contrary, short and to the point is received much better by a majority of audiences. 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. The only way to conquer this fear is to speak in public time and time again. Try the following :

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:



"And now I'd like to depart from my prepared text and speak from the heart..."

TEN WAYS TO CONTROL COMMUNICATION APPREHENSION

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



Presenting a Great Speech

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

- ⇒ Be conscious of your listening behavior. Identify your listening problems and work to solve them.
- ⇒ Motivate yourself to listen. Be opportunistic. Get all you can out of the messages you hear.
- ⇒ Prepare yourself to listen. Put problems and biases aside so that you can be more attentive and open to new learning experiences.
- ⇒ 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.
- ⇒ Work at listening. Develop a plan to extend your attention. Seek out new and varied listening experiences that exercise your mind.
- ⇒ Listen for ideas. Do not try to write down everything you hear. Focus on identifying the main points the speaker is making.
- ⇒ Concentrate on the message. Don't allow extraneous factors to interfere with listening effectiveness.





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? Members of Congress?

1. Know your setting - is the speech given at a bad time?
2. Are you prepared with the proper room and equipment?
3. What are the expectations of the audience?
4. Am I aware of any changes in my topic?
5. Should I adjust my words to previous speakers?
6. How many people are we addressing - and who is in it?
7. 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, allow them to share the learning experience with you, and then let them experience it.

Hands-on learning is best for children.

A professional presentation is much more advantageous if you're addressing the APWU Executive Board. Talk from your heart. Add passion to your words - because they reflect *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!



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 websites, emailed, or sent to local newspapers, radio, and television stations 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 only one side of the page. 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 the contact, name of the group, and date for release or "for immediate release."
- Be brief. Newspaper space and air time are costly. If you must go over to a second page, type "more" at the bottom of page 1 and use a header and 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 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 need 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 is usually required to be included for publication. Newspapers will generally verify the name and address of each author.

Auxiliary in Action



2025
2026

Chapter 6

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Conventions

Why Participate?

Every Auxiliary member should participate in their state convention and, if possible, national convention because it's an excellent 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. Conventions are a great time to discuss problems with state or national officers so that workable solutions can be found. You will likely 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 community. Best of all, you will make many new friends and find plenty of projects and entertaining activities.

Not only will you benefit from attending conventions, but so will your officers and the organization. Officers look to the membership for guidance in leading the Auxiliary. Members come with new ideas and perspectives that can spark new approaches to meeting Auxiliary goals. Members also oversee the officers' performance by setting the rules (constitutions and budgets), 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 listen. Sometimes, members need to be around people with similar interests and viewpoints. Not only can you recharge your 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 the 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 the 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 cast all of the votes accorded the Auxiliary they are representing.

National and most state Auxiliaries require delegates to be certified with credentials. Credentials ensure that a delegate representing a local or state has been duly elected. Credentials are also a tool to ensure 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.

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 the 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:** Arrive on time at all sessions. The program is full; every minute counts.
- **Prepare:** Read the material ahead of time. If you have questions, make notes and have references ready.
- **Take Notes:** 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:** Be open 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 Yourself:** 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 congratulate 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, officers, committees, or local or state Auxiliaries.

Action is not taken on some resolutions at conventions because they are improperly written or 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 resolution. 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 submits the resolution, it should be signed by the chairperson and committee members.

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 before 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 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 Davis, State President

Mike Smith 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.

Robb Blue Human Relations Committee

Ty Spence, Human Relations Committee

Jane Smith, Human Relations Committee

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). The National Secretary automatically sends state delegate credentials to the state Auxiliary President approximately four months before the National Convention. Included with the credentials are instructions for filling them out and a deadline for returning them to the Secretary. State Auxiliaries receive several forms 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 before the convention. Likewise, members-at-large must also send the National Secretary a letter requesting credentials. Locals will receive credentials for delegates and alternate delegates.

The delegate should complete the original and make a copy of their credentials. The form must be legible, so the National Auxiliary recommends that credential information be printed. At the bottom of the form is a space for committee preference. 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 forms must be signed by the president and Secretary of the organization the delegate represents or by the member-at-large. The original delegate/alternate credential forms are mailed back to the National Secretary before the deadline, which is no later than 30 days before the convening of the National Convention. A copy is retained by the delegate/alternate. The delegate must present the copy at the registration booth at the convention. If the delegate can't attend the convention, the alternate may present the alternate form 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 per capita tax paid on the average local Auxiliary membership from July 1 of the preceding convention year to June 30 of the current convention year. Per capita tax must be paid for the current year to the first day of the month following the 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 twelve (12).

Every area local and local Auxiliary is entitled to a minimum of five (5) votes plus one (1) additional vote for each ten (10) members or the major fraction thereof. State Auxiliaries are entitled to ten (10) votes. National Officers and Past National Presidents are entitled to one (1) vote. Members-at-Large are entitled to one (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

The committee chairperson will receive a committee kit containing instructions or rules, stationery, 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. Therefore, this committee must meet often and report frequently to the convention delegates. In addition, the chairperson will be called upon daily 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. The election committee must ensure a smooth, secret, impartial, and fair election process. Elections occur on Wednesday 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 handle all resolutions pertaining to the National Constitution and By-Laws, and **Miscellaneous Resolutions**, which handle 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; a certified bookkeeper does auditing. The committee studies receipts, disbursements, and financial statements to determine if the funds are being wisely spent and in the membership's best interest.

Political Action Committee

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

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 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 the 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 the National Convention appears in the National Auxiliary By-Laws. The order may be transposed at any time by a majority vote of delegates. One important exception is that the election of officers shall always be the last order of business on Tuesday afternoon of the convention.

A sample order of business for the National Convention is:

- 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 delegates who remember 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. When submitting a name, a donation of \$10.00 is greatly appreciated, with the money going to the Nilan Scholarship Fund.

Awards Presentation

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

Opening Business Session

The opening business session is held jointly with the Union and is when our National Auxiliary President addresses the convention. The session often features special guest speakers and presentations.

Preconvention Workshops

The National Auxiliary offers various workshops the day before the convention convenes (normally Sunday). Workshops are presented to guide first-time delegates, train state and local officers, and teach Auxiliary members how to approach some of our human relations or labor education projects. Workshops are advertised in the *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 your first or your tenth, you should try to attend one or more workshops. They are an excellent way to learn and return knowledge to your local or state Auxiliary!

Convention Ice Breaker

The APWU stages an icebreaker featuring nationally known entertainers on Sunday evening before the first day of the 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.



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 the convention. The initial meeting should be for general planning. Meet again with the staff about one month before the convention to review plans and sign written contracts. A short follow-up meeting should occur about one week before the convention to check on room reservations and see

how plans are proceeding. The local or state union may have a procedure for handling these meetings. Some things to ask the hotel personnel:

- What are the hotel rules and 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 one or two items for prizes?
- Can the hotel provide audio-visual equipment (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 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 must 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.

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; 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, especially 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 and 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.

The invitation and request should include all information that will help the Officer plan 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, places, and hotel information. You can follow up with another, more detailed, letter at a later date. The Officers will also need to know what they 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 sufficient quantities of recruiting materials, dues envelopes, copies of the Auxiliary Pledge, etc.

COPA Fundraising

During state conventions, the APWU and Auxiliary normally cooperate to raise funds for COPA, the union's PAC fund. The COPA fund drive information should appear in pre-convention publicity and the convention call. If donations are wanted, 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 the day and time of your COPA event with the host local and the state union president. Everyone's cooperation ensures that your event does not conflict with other convention events and has the support of your state union members. For fundraising ideas and guidelines, see the fundraising section of this handbook.

Hospitality Room

If you should be asked to assist with the hospitality room, you will find that planning and budgeting are 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, keeping 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 replenish 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

Our human relations project, which began as the Two-Can-Do project, is to help people who are in the greatest need, to encourage postal families to look beyond their 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 who the money will go to. Involve union officers in your decision making and get the full support of the union membership. The human relations 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 them 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 local newspaper, TV, or radio contact.

Ensure 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. Please 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. Ensure union officers and members, as well as Auxiliary officers and members, get credit for their contributions and work. Don't overlook anyone. You'll see the benefit next year when you seek help with this project!



Registration

The Auxiliary may be called upon to help with registration. Ensure that every Auxiliary member helping with registration knows where it will be before the convention starts. Decide when this table will be open for business. You may need a computer, printer, cash box, and extension cord. The union sets the registration cost covering 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 separately.

Sell meal tickets at registration. Many delegates bring family members and would like them to attend the meals and 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 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 number, the local represented, and the last 4-digits of the social security number (optional-used by the COPA committee).

Ensure everyone receives a name tag, meal tickets, a convention bag if available, and a receipt if requested. The registration table is excellent for selling raffle tickets or other fundraising items.

Convention Publicity

A small ad stating the date and place of the 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 local union/ Auxiliary paper. Be sure to include as much information as possible. Also, include who to contact with any questions.

A convention call should be mailed out 90 days prior to the convention. Please 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 the 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, contest entries, 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.

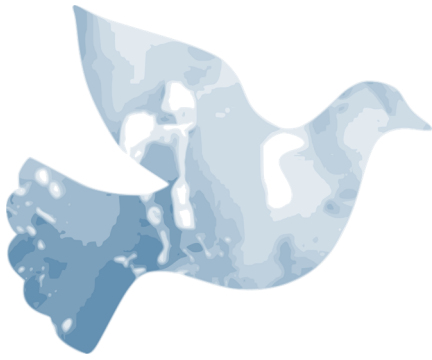


Workshops Available from the National Auxiliary

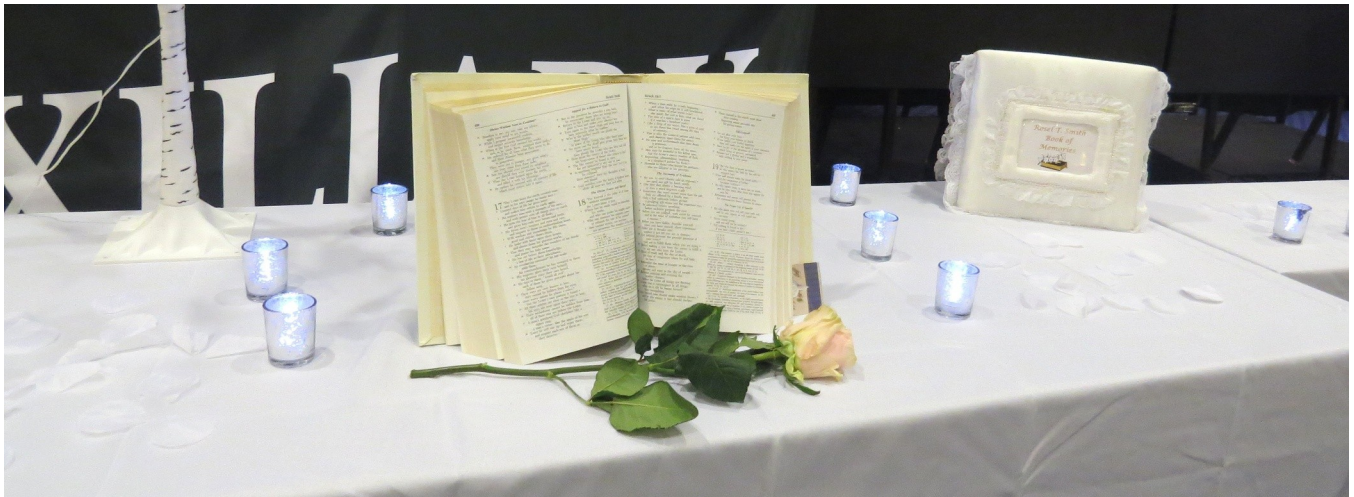
- Political Action, Legislation, Lobbying
- Membership & Recruiting
- Human Relations (Several Topics Available)
- Officer Training & Parliamentary Procedure
- Safety and Health (Several Topics Available)
- Survivors' Benefits
- Public Relations-Speaking and Writing
- Audit Procedures
- Labor Education



Book of Memories



The Book of Memories is a celebration of the life and dedication of the Auxiliary and APWU members and their loved ones. The Memorial Service is held Wednesday morning during the Biennial National Convention and is a lovely way to honor those we've lost. A memorial certificate, a program with your loved one's name, and a keepsake are given. We encourage our members to complete the form in the forms section of this handbook or on our webpage and send it to the address listed. The deadline is July 1st. We do ask for a donation of \$10.00, which is used towards the Nilan Continuing Education Scholarship.



Auxiliary in Action



2025
2026

Chapter 7

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Fundraising

Fundraising Guidelines

The National Auxiliary Executive Board has developed these guidelines to help you have a successful fundraising project. A form to help you keep a record of your project is provided in the Forms section of this handbook.

Planning Your Project

- Ensure you have all the needed materials and enough people to complete 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.
- If possible, try to get sales and raffle items donated to increase profits.
- Order only as many units as you can reasonably sell if you order sales items. 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 at keeping track of the money. The most outgoing members will be the most successful salespeople.
- 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 the 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 it immediately or 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 when you leave.
- Keep funds collected for different projects separate with a notation of what each is designated for.
- If a project is held during a convention, make partial reports to the delegates on the progress of the project. If the meeting will adjourn before the conclusion of the project, create a written report about the results and send it 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 the 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 vital 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.

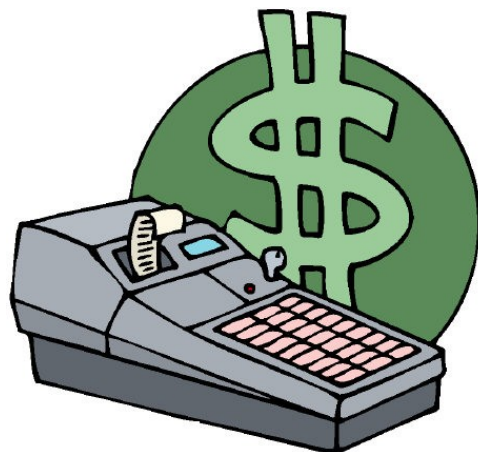
APWU COPA Strategy

What You Can Do:

1. You can use local dues or treasury "seed money" to help raise COPA contributions, provided your costs do not exceed 33 cents for every dollar raised.
2. All income and expenditures from raffles or other events must be documented and sent to APWU National Headquarters, including receipts.
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 all materials used in COPA fundraising 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 to print and distribute literature that 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 funds 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 over \$50.00 (fifty dollars).



Project Ideas

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

Raffles

The key to a successful raffle is a prize everyone would like to win. Prizes can range from handmade items to electronics. The 50/50 raffle is always popular; the winner gets half the money. The main advantage of a raffle is that minimal supplies and people are needed to carry out the project. Raffle tickets, 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 raising money beyond a goal; 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 from several personalities and the one raising the most money is the "lucky" person stuck with the task or prize. The planners of this project must 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 shell out \$X for the project because \$X was collected (it's imperative to communicate with the personality on this one). The number of variations is 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 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 the auction price and the 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. Floor runners or record keepers may collect money after the Auction (or at pre-arranged times.)

Variations on the standard Auction

The Dutch Auction This one 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 their back to the group. The auctioneer starts the timekeeper and points out "bidders." Floor runners float from their 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 the closest dollar collected before time is called is declared the prize winner.

The Silent Auction

Prizes are displayed with a sealed bid box. Bidders write their bid, the name of the prize, and their name on a bid sheet deposited in the bid box. The highest bidder purchases the prize. All bidders must create their highest bid for each item to win. Money is collected when prizes are awarded, and the National Auxiliary suggests that participants must be present to win to expedite money collection and prevent controversy.

The Speakers Auction:

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 speech for each \$10 collected.

The White Elephant Auction

This one awards those useless, ugly, unusual, or unique household dust collectors donated by the members for the Auction. Bidders may bid on their favorite items or 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 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 cashiers.

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 hopscotch, jacks, water gun shooting, 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, servers, 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 dessert and ending with hors d'oeuvres.

Rummage and Garage Sales, Craft Fairs, Bake Sales

Depending on the number of volunteers and items donated for sale, these can be elaborate or simple. Ads should be placed in the local newspaper and signs put out to attract customers. There are variations in 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

A book sale is a good way to help community members unload their used books. Books should be collected up to four weeks before 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 a 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 the U.S.A.

Pocket Change Collection

There are several variations of 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 the member is not wearing anything union-made, the member must give up all pocket change. Members not wearing a name tag must give up all pocket change, or any union members 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 or 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

Mystery parties are staged who-done-it. Members "play" different characters and pay to guess who did it. Partygoers 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 another appropriate costume) to solicit contributions. This person should ham it up for maximum donations.



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Auxiliary Forms

*** **NOTE:** All forms are numbered and printed as single sided pages so you can duplicate them for multiple uses.

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Today's Date

National Auxiliary Supply Order Form

***Note - Orders with no balance due may be emailed to the Secretary**

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 Secretary. Checks should be made payable to: The Auxiliary to the APWU.

Mail to: Karen Wolver 208 Brick St SE, Bondurant, Iowa 50035-2020
email: kwolver@apwuAuxiliary.org Phone (515) 771 7183

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

QUANTITY	PRINTED OR SPECIALTY ITEM	UNIT COST	TOTAL COST
	Constitution & By-Laws	FREE	FREE
	Membership Application Envelopes First 50	FREE	FREE
	Membership Cards—First 50	FREE	FREE
	Informational Auxiliary Flyers - First 50 Free	FREE	FREE
	Auxiliary Handbook (Free Download available in pdf format on www.apwuAuxiliary.org)	FREE	FREE
	Organizing Packet	FREE	FREE
	Auxiliary Handbook USB Drive - Color Copy	\$ 7.00	\$
	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	\$
	Additional Membership Cards after the first 50	\$ 0.10	\$
	Auxiliary Pledge Cards	\$ 0.05	\$
	Additional Informational Auxiliary Flyers after the first 50	\$ 0.10	\$
	Guide to Parliamentary Procedure Flip Chart	\$ 3.00	
	Stationary Letterhead (per Unit of 100 sheets)	\$ 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 Logo Label (2 x 4 - 2/color) (sold in units of 10)	\$ 2.50	\$
	Auxiliary Song— CD (includes other labor songs)	\$ 5.00	
	TOTAL		

Revised
02/04/2025

Name

Ship to: Address

City, State, Zip

Your email:

for office use only

Date Rec'd

Date ck to

Treas

Date Shipped

Ordered by: (your signature)

Del Conf #

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Bridge Builders Award Nomination Form

Please Send (via U.S. Mail or email) completed form of nomination to:
Lisa Beer 3006 N 5th Ave Whitehall, PA 18052 lbeer@apwuauxiliry.org



PLEASE USE BLACK INK TO FILL OUT FORM
THIS FORM MUST ACCOMPANY YOUR NOMINATION

Name of person being nominated:

City and State that nominee is from:

Which of the following has the nominee been active in? (Check all that apply)

Assisting the Union/Auxiliary

Legislation/Political Action

Public Relations

Human Relations

Organizing/Recruiting

Other (Please Specify)

Has the nominee been or is an Officer in the APWU or Auxiliary to the APWU? APWU AUXILIARY

Offices held and at what level?

_____ State _____ Local _____

How many years has this person been a member (if known)

Is their family member involved ? (Brief description)

Did they chair any committees for their local or state? Yes please give details

Did they implement any new programs at the state or local level ? yes please give details

Please tell us about any community service they are or have been involved in:

Name, address and local of person submitting this nomination:

Date Submitted _____

Submitted by (name and local)

****FORMS MUST BE RECEIVED BY JANUARY 1st, 2026**

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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 :

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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: _____
Outgoing Officer Names:	President	_____	
	Vice President	_____	
	Secretary	_____	
	Treasurer	_____	
	Other:	_____	

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Goals and Objectives Worksheet

Goal Statement: _____

Objective # _____

Tasks For Objective # Target Date	Person Responsible

Objective # _____

Tasks For Objective # Target Date	Person Responsible

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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				
ouchers (current period)				
Financial Reports				
Current Year				
Last Year				
1st month of current year				
IRS records, etc.				
EIN (match national #)				
Last audit report				
Constitution				
Policy statement				
Inventory lists				
Minutes				
Membership Meetings				
Executive Board Meetings				
Membership records				
Audit report signed				
Bonded				

Additional Comments

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Expense Voucher

Office _____

Ending / /
Date

[illegible]

Total Expenses	\$ _____
Advance Received	\$ _____
Reimbursement Due	\$ _____
Amount Repaid	\$ _____

All receipts are attached ☐

Signature_____

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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						

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50/50 COPA Collection APWU & AUXILIARY					DATE
Name	Last 4 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					

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Book of Memories



Auxiliary to the American Postal Workers Union

In Memory of: _____

Last known residence: City: _____ State: _____

List any titles held in APWU or Auxiliary: _____

Please list name **EXACTLY** as you want it to appear in the Book of Memories

Submitted by: _____

Local/State APWU, Auxiliary: _____

Address: _____

City: _____ State: _____ Zip: _____

Send Acknowledgement card to (if different):

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Remembered by _____

(This line must be completed)

\$10.00 Minimum Donation Suggested Amount Enclosed: _____

Make checks payable to:

Mail checks to:

Auxiliary to the APWU

Karen Wolver Secretary

208 Brick St SE

Bondurant, IA 50035-2020

All proceeds go to the Nilan Scholarship



Forms must be received by July 1, 2026 to be honored at the 2026 Convention

Please Print or Type