A. FINANCIAL POLICY

B. ARBITRATION COSTS POLICY

C. FULLY FUNCTIONING LOCAL POLICY

D. FACEBOOK POLICY
FINANCIAL POLICY
IUE-CWA Local Financial Policy

The safekeeping of the local's assets and records are essential to the existence of the union. The responsibility for safekeeping assets and financial records falls to the duly elected officers of the Local. In order to assure that assets of the Local are being properly held and administered by the Local on behalf of the membership, IUE-CWA has adopted the following financial policies.

1. In order to follow appropriate financial procedures and maintain financial controls, all Locals must duly elect the required financial officers (President, Treasurer, Financial Secretary, Trustees), and those officers must follow the duties and responsibilities of their respective offices as printed in the CWA UOPM. Under no circumstances should one officer or employee administer all of the financial affairs of the Local.

2. All Local financial officers should attend financial training opportunities as soon as possible after taking office. Educating themselves on the duties of their positions is a primary responsibility of Local officers. Online training is also available at iue-cwa.org.

3. **Locals must use a voucher system for the approval of expenditures.** The primary accounting record for an IUE-CWA Local will be its checkbook and the system of documents that tracks deposits and disbursements from its checking account.

4. Most locals should employ a computer based accounting system because the information that is inputted correctly will be permanently stored. Financial information stored in the computer system must be saved and back-up regularly. The software used will also be able to process that data in preparing standard financial statements with little additional work. A standard accounting system software package is readily available to the local off-the-shelf.

5. Local Unions must NOT utilize a debit card which accesses the Local’s bank account.

6. The use of credit cards in the Local’s name is discouraged. Local officers can and should maintain credit cards in their own names and be reimbursed for approved expenses.

7. Locals should maintain open and transparent finances, and report same to the membership at each membership meeting.

8. Local unions should budget in such a manner that they are able to afford to send officers to training sessions and CWA and IUE-CWA Division meetings.
ARBITRATION
COSTS
POLICY
November 25, 2013

TO: IUE-CWA Local Union Presidents
FROM: James D. Clark, Division President
RE: Arbitration Costs Policy

Since the merger with CWA, Local Unions are eligible to have certain costs for arbitration paid by IUE-CWA. What follows is an explanation of how the policy works.

Who is eligible?

In order to have the costs paid, the final decision about whether or not the case warrants arbitration must be made by the Division.\(^1\) Historically, in most IUE Locals this decision resided with the Local, who paid the costs associated with the authority to decide.

What costs will the IUE-CWA pay?

For Locals that subscribe to the policy, the administrative fee for the American Arbitration Association, the Federal Mediation and Conciliation Service or other administrative agency is covered, along with the arbitrator’s fees and expenses for arbitrating the case. Also included are any costs for the hearing room rental. Court reporter’s fees are not paid without special advanced approval for unique cases. The Local remains responsible for lost time for witnesses and officers in preparing for and attendance at the hearing.

How will the decision about arbitration be made by the Division?

If a Local Union decides to participate in this arbitration costs procedure, the final decision on whether to arbitrate must be made by the Division President. In order to expedite the decision process, I have authorized the IUE-CWA Regional Directors to review the cases initially on my behalf.\(^2\) Of course, the Local continues to maintain the responsibility to evaluate all cases in the

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\(^1\) Locals that participate in the 70 - 30% split in per capita are not eligible to participate for any units so covered. The basis on which 70 - 30% units receive a greater portion of the per capita is that the Local, not the Division, provides full service to the unit, including arbitrations.

\(^2\) The exception is for the GE & Aerospace Conference Board units, where the decision will continue to be made by the Chairman of the Conference Board.
Memorandum to IUE-CWA Local Union Presidents  
November 25, 2013  
Page 2

first instance. When the Local’s recommendation is to arbitrate, that recommendation, along with all supporting materials, must be provided to the Regional Director, who will determine whether or not to approve arbitration. If a Local participates in the policy and determines, at the Local level, that a case does not warrant arbitration (therefore it is not sent for determination), the case cannot be appealed by the grievant to the Division (the member should always be given a right to appeal a denial by a Local’s grievance committee to the membership).

What happens if the Regional Director denies the request of the Local for arbitration?

Either the Local or the grievant may file an appeal within thirty (30) days to the Division President, challenging the Regional Director’s decision not to arbitrate. If the Division President sustains the decision not to arbitrate, then the CWA Internal Appeals Procedure for Arbitration Complaints is utilized to challenge that decision. (A copy of the complaint procedure is enclosed.) If a complaint is filed, it is initially reviewed by the CWA President, with subsequent appeals permitted to the CWA Executive Board and, in some instances, to the CWA Convention under Article VII, Section 1, Paragraph (b) of the Constitution. In the event a Local or grievant invokes this procedure, the Local Union must ensure that the grievance remains active until such time as a final determination is reached.

How will expenses be paid?

Authorized and covered expense invoices should be submitted to the IUE-CWA Regional Director who initially approved the arbitration. The Regional Director will process the expenses to the CWA for final payment. Payment will be directly from CWA accounting to the vendor. Except in unusual circumstances, Locals should not pay vendors and seek reimbursement for the expense.

Are Locals required to participate in this arbitration cost process?

No. The decision to participate in this process is entirely voluntary. No non-Conference Board Local is required to share its authority concerning arbitration decisions with the Division. If Locals determine to retain the authority over arbitration decisions, they simply do not sign up. The Local then remains responsible for final determination, as well as paying the costs associated with that authority. When possible, the Division continues to provide staff representatives to arbitrate for Local Unions who choose not to participate in the policy. There is no appeal procedure for the Local or the grievant if the Local retains control over the arbitration decision and the associated costs.

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3 Again, because of their national contracts, the GE & Aerospace Conference Board units are the exception.
Memorandum to IUE-CWA Local Union Presidents
November 25, 2013
Page 3

While these procedures and concepts are different from pre-merger, I believe that this process represents an excellent benefit derived from our merger with the CWA. Not only do Locals now have the opportunity to reduce their costs associated with arbitration — costs some employers utilize as a weapon against legitimate grievances — but Locals can also benefit by receiving an independent evaluation of the merits of cases that are submitted to the Division for arbitration. Please complete the enclosed form if you desire to participate in this program to have certain arbitration costs assumed by the IUE-CWA.

If you have any questions, please call or write to General Counsel Peter Mitchell.

Best regards.

JDC:pmk

Enclosures

c:  Joseph Giffi
    Roger Deel
    Kenneth Ream
    Robert Santamoor
    Willie Thorpe
    IUE-CWA Staff Representatives
    Peter Mitchell
III. Arbitration Complaints

In the event a Vice President determines not to arbitrate a grievance, either the Local or the grievant(s) may file a complaint.

In the event the Local does not file the initial arbitration complaint of a Vice President's decision not to arbitrate a grievance, the Local's right to file a complaint or to appeal at any level of the Internal Appeals Procedures shall be extinguished.

In cases where either the Local or the National Union settles a grievance, the grievant will have no further right to appeal pursuant to these appeals procedures.

A. The Complaint

1. A complaint of a Vice President's decision not to arbitrate a grievance shall be:
   
   (a) In writing;
   
   (b) Signed by the complainant;
   
   (c) Filed with the President of the Union; and
   
   (d) Submitted within thirty (30) days of the notice of the Vice President's decision.

B. Consideration by the President of the complaint

(1) The President shall take whatever steps are deemed necessary to secure the facts of the matter complained about which may include an investigation and the obtaining of all records of the matter in the possession of the Vice President, the Local, its officers or governing body.

(2) The President shall review the complaint and within thirty (30) days affirm, reverse or modify the decision of the Vice President, or return the case to the Vice President with such direction or order as may be determined to be appropriate. He or she shall notify interested parties of his or her action.

C. Appeal of President's decision

1. The decision of the President may be appealed in writing by the grievant(s), the Vice President or the Local, if otherwise appropriate, to the Executive Board of the Union within thirty (30) days following the date of the notice of the President's decision. The appeal shall be filed with the Secretary-Treasurer of the Union.

2. The Executive Board shall review the appeal and affirm, reverse or modify the decision of the President.
3. The Executive Board shall base its decision upon the record of the matter, including such statements as may be filed by the grievant(s), the Local, the Vice President or the President, and any other facts that may be developed.

4. There shall be no right to appear personally before the Union Executive Board, except at the invitation of the Executive Board.

5. Interested parties shall be notified in writing of the decision and action of the Executive Board.

6. The decision of the Executive Board on an appeal by a grievant shall be final and the grievant shall have no further right of appeal.

7. The decision of the Executive Board may be appealed by a Local or the Vice President, if otherwise appropriate, to the next Convention or President’s Meeting by giving notice of appeal in writing to the Secretary-Treasurer of the Union within 30 days after the decision. As provided more fully in Article IX, Section 7 of the CWA Constitution, commencing immediately after the 2011 CWA Convention, all appeals of Executive Board decisions pending in non-Convention years may be heard and resolved by delegates to a Local President’s meeting to be called by CWA Secretary-Treasurer. If the Executive Board’s decision is issued less than 30 days before the Convention or President’s Meeting, the appellant shall have the option of filing an appeal prior to that President’s Meeting or Convention or exercising the full 30 day appeal period and waiting until the next scheduled Convention or President’s Meeting for a decision.

*Adopted: By the CWA Executive Board, April 19, 2012.*
TO:       James D. Clark, President  
          IUE-CWA  
          2701 Dryden Road  
          Dayton, OH 45439  

ARBITRATION COSTS POLICY  

Local _______________ has reviewed the IUE-CWA policy on eligibility to have certain costs of arbitration paid by the IUE-CWA. Local _______________ hereby requests to participate under this policy and acknowledges that by participating, the Local is authorizing the final decision to arbitrate a case to be made by the Division, subject to appeal rights under the CWA Internal Appeals Procedures.

Date__________________  

President__________________  
c: Regional Director  
   Staff Representative
FULLY
FUNCTIONING
LOCAL
POLICY
Fully Functioning Local Policy

Per the resolution below, IUE-CWA Locals are expected to be “fully functioning” in how they represent members, train stewards, participate in IUE-CWA and CWA meetings and programs, communicate with and mobilize the membership of the local, organize, and participate in political action.

CWA Resolution: 74A-13-3

In 2006, the 68th annual CWA Convention unanimously agreed on the Ready for the Future plan. In that plan, Step Five - titled “Locals: Fully functioning and effective locals strengthen bargaining power” - affirmed that “...representation [of members] must be effective, and that requires trained stewards, full participation in constitutionally mandated meetings and programs, and resources for membership communication and mobilization, as well as organizing and political action. Our members deserve no less.” The need for fully functioning locals that effectively represent educated and mobilized members, united in fighting for our union’s goals of justice and equity for all workers, is even more critical today in a period in which collective bargaining coverage in the private sector has declined to less than seven percent of the workforce. As a result of that decline, fewer and fewer workers have an organized voice through which to bargain for a fair share of the wealth that we produce. As a result, average U.S. workers’ wages, adjusted for inflation, have declined by 6.3 percent since the 1970s even as productivity increased by 57 percent. The economy grows and workers create wealth, which gets siphoned off by those at the top where financial and corporate power is concentrated. CWA’s history has followed the same path as the rest of the labor movement. Our members in different industries have been buffeted by the winds of technological, regulatory, and financial change. Despite success in organizing new members, our ability to win representation elections and achieve first contracts is severely limited by labor laws that favor anti-union companies. Our ability to achieve gains at the bargaining table is directly linked to our ability to organize workers in our industries. Where we have collective bargaining, our power is limited because each year we represent fewer of the workers in those industries. Turning these conditions around will be tough. The challenges are made more difficult by the blocks to democracy brought on by an increasingly dysfunctional political culture dominated by moneyed and corporate interests and their political allies who use anti-democratic Senate rules to block the will of the majority. The Senate filibuster prevented even one minute of debate on the Employee Free Choice Act. Even when those we support are successful at the ballot box, despite corporate and secret money and voter suppression, the road to progressive change is obstructed by unwillingness of our Democratic allies to move forward. After decisive victories in 2012, the Senate leadership blocked efforts to fix the Senate’s broken rules, accepting a weak compromise which has done nothing to eliminate the gridlock of the last several years. Progressives win elections and then choose not to govern. CWA’s strength comes directly from our capacity to fight to achieve our union’s vision at the local, state and national levels – both politically and at the bargaining table. The national union and CWA locals must work together to communicate with members and move them to action. Members must understand that while our
losses have weakened our Union, we can grow stronger if we are united and moving in the same
direction. Our members’ union connection is linked to their other roles in the community. Building
coalitions with other unions and progressive organizations in a movement for change will benefit
everyone. Article 13, Section 9 of the CWA Constitution sets clear duties and obligations for Local
Unions. In addition to the representation of workers in their jurisdiction and many important
administrative responsibilities, these duties include the active promotion of union programs, organizing,
legislative and political activity, member education, women’s and equity committees, among others.
These critical activities will help CWA build a movement for democracy and equity. In reviewing the now
withdrawn proposal establishing a minimum size for local unions, the Constitution Committee noted
that Article 13, Section 5 of the CWA Constitution provides for the Executive Board to revoke or suspend
the charter of a local union that fails to carry out its obligations as listed in the CWA Constitution. There
may be very effective and fully functioning local unions that represent relatively small numbers of
members in all the ways described by the CWA Constitution. There may be large local unions that are
not effectively representing their members, as defined by the Constitution. A local with a large number
of members cannot guarantee its effectiveness by its size, nor is a small local necessarily incapable of
meeting all the requirements of a local union. The only way to rebuild worker power is to build a
movement of tens of millions to pressure every level of our government, our economy, and our society.
Union members must unite with immigrant workers, environmentalists, civil rights activists, and other
progressive forces that support justice. CWA’s local unions are the foundation of our union where we
can have the greatest impact in building a strong and lasting movement for democracy and economic
justice. Resolved: All local unions are expected to meet their responsibilities and obligations to be fully
functional organizations, as defined by the CWA Constitution. The size of a local does not guarantee its
effectiveness. Resolved: It is no longer enough for local unions to focus only on the representation of
our members. To rebuild worker power in this country, we have no other choice as a labor organization
in the United States in 2013 but to work together – at all levels of our organization – with other unions
and with other progressive organizations to build the movement for democracy and economic justice.
Resolved: CWA local unions must make it a priority to educate and mobilize members to give them a
real opportunity to participate in building the movement for democracy and economic justice.

Read more at: http://www.cwa-union.org/pages/fully_functioning_local_unions
FACEBOOK
POLICY
Sample FACEBOOK Usage Policy for Locals

We encourage Locals to use Facebook to communicate with members; however, if a Local creates a Local Facebook page, they need to have a usage policy to govern posting. Posts which are critical of officers/ Locals cannot simply be deleted without cause. The sample policy below will help Locals maintain a professional/civil level of discourse on their pages.

About
IUE-CWA, the Industrial Division of the Communication Workers of America

General Information
Community Guidelines

We encourage this kind of feedback in our comment section:
• “On topic” and responds to the content in the article or post
• Responds to comments left by other followers
• Brief and to-the-point
• Positive/constructive tone
• Offer opinions without insulting individuals, companies, unions or other organizations

We reserve the right to delete comment(s)/Image(s), without notice, that violate the spirit of these guidelines. Repeated violations may result in a user being banned from posting.

Please do not post this kind of content:
• Uses foul, discriminatory, libelous or threatening language, or use racially, ethnically or otherwise objectionable or harassing language
• Contains advertising, solicitations or spam
• Invades the privacy of others
• Violates trademark or copyright laws or other laws
• Attacks individuals, companies, unions or other organizations

This Facebook page is a venue for entertainment and discussion only, for the most up to date information about IUE-CWA activities or if you have questions or concerns about your rights under a Union contract or benefits funds, please check directly with your local officers or staff representative

If you have any questions regarding the moderation of this page, contact

The comments posted do not reflect the opinions of IUE-CWA or its officers and employees.