



Policies

Updated June 13, 2023

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Revision History

June 13, 2023

Membership adopted a packet of new and revised policies, replacing all prior policies

Mission, Values, Membership Status, Conduct

101 Mission Statement

Reference

AFSCME 189 Constitution, Article III: The objectives of this local shall be to carry out on a local basis the objectives of the American Federation of State, County and Municipal Employees.

Policy

AFSCME 189's mission is to:

1. Improve the wages, hours, and working conditions for its members
2. Defend the terms of its collective bargaining agreements
3. Represent the interests of members well in employee relations matters and provide good member services
4. Organize represented employees to become AFSCME 189 members and leaders
5. Advocate for political and social policies that benefit its members and labor movement, including economic and social justice
6. Support the mission of AFSCME Council 75 and AFSCME International

Adopted: June 13, 2023

I02 Diversity, Equity, Inclusion, Non-Discrimination, Accommodations, Accessibility

Policy

1. AFSCME 189 values diversity, equity, and inclusion.
2. AFSCME 189 opposes discrimination and harassment against individual people and groups based on race, ethnicity, color, religion, gender identity, sexual orientation, national origin, citizenship status, immigration status, marital or family status, disability status, veteran status, age, or any other protected status under federal, state, or local law.
3. AFSCME 189 strives to be anti-racist.
4. AFSCME 189 will continuously promote and improve diversity, equity, and inclusion, and eliminate discrimination in its activities. These activities include, but are not limited to: representing members, collective bargaining, hosting trainings and events, recruiting new members, choosing vendors, selecting officers and stewards, committee activities.
5. AFSCME 189 will provide reasonable accommodations to people with disabilities, to promote effective participation in the organization.
6. AFSCME 189 values accessibility of its services. AFSCME 189 is a member-driven organization and encourages active participation by all members in decision-making.

Examples

Depending on the activity and situation, the following examples illustrate equity, inclusion, accommodations, and accessibility:

- a) Providing additional outreach and services to underrepresented groups
- b) Analyzing services for barriers to access, disparate impacts, and underrepresentation, and making changes to address these issues
- c) Using language that puts people first (“member who has a disability” instead of “disabled member”), using gender-neutral language (“Members are eligible to receive XYZ after **they** do ABC” instead of “The member is eligible to receive XYZ after he does ABC”), using correct pronouns and names
- d) Speaking up when discrimination or harassment occurs; interrupting hate speech
- e) Scheduling meetings for times and places that are convenient to members, taking into account their family and work obligations
- f) Holding meetings in physically accessible, Americans with Disabilities Act-compliant spaces; providing gender-neutral facilities
- g) Providing translation of written materials, interpreters for meetings (including sign language interpreters), closed captions for virtual meetings, and documents and webpages that are accessible to screen readers; avoiding text and numbers that are not rendered as text (for example, in screenshots or graphics)
- h) Providing childcare during meetings

Acknowledgements: This policy was modeled, in part, after an example by the Association of Local Government Auditors

Adopted: June 13, 2023

I03 Code of Conduct

Reference

AFSCME International Constitution, Article III, Section 10 requires new members to subscribe to the Membership Obligation

AFSCME Financial Standards Code, Article X relates to confidentiality of financial records

Policy 307 Oath of Office

Policy 311 Conflict of Interest

Policy

1. In accordance with the AFSCME International Constitution, each new member is required to subscribe to the Membership Obligation:
I, [name], promise to abide by the Constitution of the American Federation of State, County and Municipal Employees and Local Union 189. I further promise to carry out all duties assigned to me and to do my best to uphold and promote the principles of trade union democracy.
2. Honesty and Integrity: Members and employees will act with integrity and honesty when using AFSCME 189 services or resources.
3. Speech: Members and employees will be respectful, courteous, and inclusive in their speech. Members will not use abusive, threatening, harassing, or discriminatory language.
4. Assets and Resources: Members and employees will use and permit the use of AFSCME 189 assets and information only for the performance of AFSCME 189 business. Officers and employees will not accept or provide any gift, benefit, or favor in exchange for special consideration or influence or where it may be perceived to be in exchange for special treatment. Officers and employees shall not abuse their position to derive any personal profit or gain — directly or indirectly. Members and employees will not solicit or accept bribes or gifts of more than nominal value from any employer, member, employee, or any person or firm which has or is seeking to establish a business relationship with AFSCME 189. Officers and employees will act with fiduciary responsibility and will not misappropriate, embezzle, improperly use, or illegally use AFSCME 189 funds, or destroy records. Candidates for AFSCME 189 officer positions will not use AFSCME 189 assets or resources for their campaigning.
5. Violence is prohibited.
6. Sexual harassment is prohibited.
7. Picket lines: The President and their designees may set more specific rules of conduct for picket lines, rallies, and demonstrations.
8. Alcohol and drugs: To maintain a positive public perception of AFSCME 189, members and employees will exercise good judgment when consuming alcohol and drugs during Union business or Union events. Executive Board members and bargaining committee members are prohibited from consuming alcohol in public settings related to bargaining, contract defense, and strikes; this includes bargaining meetings, picket lines, rallies, and action events. Members are discouraged from consuming alcohol in these public settings.
9. Dues and membership: Members will pay dues in accordance with the AFSCME 189 Constitution and applicable laws. People will not obtain membership through fraud or misrepresentation.
10. Anti-Union Work: Members and employees will not collude with management to the detriment of the welfare of AFSCME 189 or its members. Members and employees will not assist a competing organization within the jurisdiction of AFSCME 189, including soliciting another labor organization or soliciting AFSCME 189 members to become members of another labor

organization. Members and employees will not support decertification of AFSCME 189.

Members and employees will not encourage other members to drop AFSCME 189 membership.

11. Strikebreaking: Members will not work as strikebreaker or violate wage or work standards.
12. False representations: Members and employees will not make materially false statements or representations or omit material facts on behalf of AFSCME 189. This includes falsely declaring or implying that AFSCME 189 endorses or opposes a candidate or ballot measure when AFSCME 189 has, in fact, not done so. This includes bringing false charges against a member, officer, employee, or Council Representative.
13. The Council Representative and contractors are expected to adhere to this code of conduct as if they were employees.

Acknowledgements: This policy was modeled, in part, after examples by the Association of Local Government Auditors, SEIU 503, and AFSCME 328.

Adopted: June 13, 2023

I04 Land Acknowledgement

Policy

AFSCME 189 recognizes that it operates on lands that have been stewarded since time immemorial by people from the Multnomah, Wasco, Cowlitz, Kathlamet, Clackamas, Bands of Chinook, Tualatin, Kalapuya, Molalla, and many other tribes. AFSCME 189 recognizes that Portland today is a community of many diverse Native peoples.

Acknowledgements: This land acknowledgement was modeled, in part, after examples by the [Port of Portland](#) and the [Portland Parks Foundation](#).

Adopted: June 13, 2023

I05 Privacy

Policy

1. AFSCME 189 recognizes that its members are the owners of their personal information. AFSCME 189 respects each member's ability to control how their information is collected and used.
2. AFSCME 189 values the privacy of members' personal contact information and sensitive information they may disclose to AFSCME 189.
3. AFSCME 189 may share member data with other AFSCME affiliates and vendors to carry out union business and provide services to members.
4. If AFSCME 189 uses member data or shares member data with other entities, as little personal data as necessary should be shared, it should be anonymized and aggregated as much as possible, and it should be returned to AFSCME 189's custody or deleted afterwards.

What member information AFSCME 189 collects

1. General member data and contact information – such as home address, personal email address, and personal phone number, and employment information. Some of this information may be provided by the employer to AFSCME 189 and may be a public record on the employer's side.
2. Media – such as pictures, videos, and audio recordings taken at in-person events and virtual meetings
3. Participation information – such as records of participation in committees, campaigns, events, social media, and meetings
4. Survey and petition responses
5. Financial data – such as dues, stipends, expense reimbursement records
6. Information submitted by members to AFSCME 189

Why member information is collected

AFSCME 189 collects data in good faith to provide services to members.

How member information is collected and managed

1. Members may inquire with the Executive Board about their data that has been collected. Members can correct their personal contact information through their employer. To the extent possible, AFSCME 189 allows members to manage their personal information.
2. The Executive Board is responsible for ensuring appropriate use of member information. Potential breaches or violations should be reported to the Executive Board.
3. Officers, Stewards, Committee members, others designated by the Executive Board, AFSCME Council 75, AFSCME International, and AFSCME 189 employees may access member information to provide, improve, and report on AFSCME 189 activities, programs, and services.
4. AFSCME 189 may share member information with third parties in order to provide AFSCME 189 services. Examples include third party providers sending member emails, sending mail, and processing financial transactions on behalf of AFSCME 189.
5. AFSCME 189 will generally inform or seek permission when members are personally identified in AFSCME 189 publicity materials; except photos or videos taken in public places do not require permission.

Prohibited uses of member information

1. AFSCME 189 will not sell or give member information to third parties for third parties' commercial or marketing purposes.
2. Use of member information in violation of the Non-Discrimination policy is prohibited.

Acknowledgements: This policy was modeled, in part, after an example by the Association of Local Government Auditors

Adopted: June 13, 2023

I06 Tax-Exempt 501(c)(5) Status

Reference

AFSCME Financial Standards Code, Appendix A

Policy

AFSCME 189 will maintain its tax-exempt status under Internal Revenue Code 501(c)(5).

Procedure

1. The President and Treasurer are responsible for maintaining documentation related to the tax-exempt status.
2. Officers will not engage in activities that are prohibited by federal law related to the tax-exempt status of AFSCME 189, and will seek legal or tax advice for complex or controversial issues.
3. The net earnings may not inure to the benefit of any member.
4. Managing a savings or investment plan may not be the principal activity of AFSCME 189.
5. Engaging in lobbying may require a notice to members regarding the percentage of dues paid that are applicable to lobbying activities. Refer to Policy 703 Lobbying.
6. Political activities may not be the primary activity of AFSCME 189. Expenditures for political activities may be subject to tax. Refer to Policies 701 Political Endorsements and 702 Political Contributions.

Adopted: June 13, 2023

I07 Traditions

Policy

1. AFSCME 189 honors the legacy of William “Bill” Lucy, labor leader and Secretary-Treasurer of AFSCME International from 1972 to 2010.
2. AFSCME 189 celebrates the Labor Day holiday.
3. AFSCME 189 regularly sends delegates to Oregon and International conventions.

Adopted: June 13, 2023

I 10 Mass Communications to Members

Reference

Policy 720 Public Communications and Correspondence

Policy

1. To provide services and information, encourage meeting attendance, or make requests of members, AFSCME 189 may use mass communications, including the member-wide email distribution list, automated text messages, and letters/postcards. Mass communication means that a large group or all members receive the same message.
2. To keep recipients of mass communications engaged, AFSCME 189 will judiciously use mass communications. The writer will draft and edit the message, keeping in mind accuracy, relevancy, priority, completeness (including attachments), clarity, and brevity. The President or the Communications Editor will review and approve the message. For the member-wide email list, two to four messages per month are generally appropriate.
3. Only the President and the Communications Editor are authorized to send mass communications to the entire membership. Members wishing to send a mass communication to the entire membership should approach the Executive Committee. Controversial items should be discussed by the Executive Committee before sending mass communications.
4. Content generally **not** appropriate for mass communications:
 - a) Messages that could be considered spamming because of their content or repetitive nature
 - b) "Reply all" should be disabled.
 - c) Links to news articles, blog posts, opinion pieces written by non-AFSCME 189 members, unless the link is accompanied by commentary from AFSCME 189
 - d) Advertisements or solicitations coming from outside AFSCME 189 will generally not be sent by mass communication to all members.
 - e) Campaign messages from candidates for AFSCME 189 officer positions, unless the Executive Board or another appropriate committee provides a forum for **all** candidates to share their campaign message

Adopted: June 13, 2023

I20 Membership Resignation

Reference

See Union Security article in collective bargaining agreement

Policy

1. Membership ends when the member leaves employment in an AFSCME 189 bargaining unit.
2. Members of the main AFSCME 189 bargaining unit at the City of Portland may drop their AFSCME 189 membership without penalty during a five-day period commencing with the first Monday of each March. Outside of this period, members can drop their membership, but dues collection will generally continue until the earliest of the following events: (1) next first Monday of March, (2) anniversary date of becoming an AFSCME 189 member, in accordance with the *Janus* Supreme Court decision, (3) leaving employment in the AFSCME 189 bargaining unit, (4) expulsion or suspension from membership in accordance with Policy 121 Removal from Office; Suspension or Expulsion from Membership.

Adopted: June 13, 2023

I2I Removal from Office; Suspension or Expulsion from Membership

Reference

See Union Security article in collective bargaining agreement

AFSCME International Member Bill of Rights, Section 9: Charges against a member or officer shall be specific and shall be only on grounds provided in this Constitution. Accused members or officers shall have the right to a fair trial with strict adherence to due process. The accused shall be considered innocent until proven guilty.

Policy

1. AFSCME 189 may penalize officers, employees, and members who have been found guilty of "Charges," following the judicial procedure in Article X of the AFSCME International Constitution.
2. Penalties include:
 - a) Removal of an officer from AFSCME 189 office
 - b) Suspension from the right to hold elected office – in AFSCME 189 or in all of AFSCME – for up to four years
 - c) Suspension from membership for up to two years
 - d) Expulsion from membership
 - e) Suspension from employment
 - f) Removal from employment
3. The Executive Board is the trial body deciding these penalties
4. Penalties will not violate the Non-Discrimination policy

Adopted: June 13, 2023

I22 Complaints Against Members and Officers

Reference

AFSCME International Member Bill of Rights, Section 9: Charges against a member or officer shall be specific and shall be only on grounds provided in this Constitution. Accused members or officers shall have the right to a fair trial with strict adherence to due process. The accused shall be considered innocent until proven guilty.

AFSCME International Constitution, Article X

Policy 121 Removal from Office; Suspension or Expulsion from Membership

Policy

1. Any member can raise a complaint against an AFSCME 189 officer, employee, or another member to allege non-compliance with: the law, AFSCME 189's Constitution, AFSCME 189's code of conduct, AFSCME 189's conflict of interest policy, AFSCME 189's financial policies, or duty of fair representation.
2. Certain complaints rise to the level of a "Charge" as defined by the AFSCME International Constitution, Article X, Section 2, which will trigger "Trial" procedures as defined in the AFSCME International Constitution, Article X. AFSCME 189's "Trial Body" is the Executive Board.
3. AFSCME 189 will appropriately handle such complaints by:
 - a) Receiving the complaint: Any Executive Board member, Trustee, and the Council Representative will receive a complaint and properly document and forward it. Complaints about Stewards should generally be directed to the Chief Steward. AFSCME 189 may create a complaint form. When receiving the complaint, it is a best practice to gather and document as much relevant information from the complainant as possible, including the basics of who/what/when/where/how.
 - b) Protecting the complainant's identity, if requested, to the extent possible and permitted by law and the AFSCME International Constitution
 - c) Not retaliating against complainants
 - d) Investigating the facts: If a formal investigation is prudent or required, the Executive Board will designate an investigator who is competent and does not have a conflict of interest to find out the facts through document reviews, interviews, and analysis. For simple investigations, a Steward or Executive Board member can conduct the investigation. For complex or serious investigations, one or more Executive Board members, Trustees, or outside investigator will lead the investigation. Investigation best practices are: making and following an investigation plan, understanding relevant laws and policies, obtaining relevant documents, interviewing witnesses, offering an interview to the accused, and limiting communications between the accused and witnesses and the complainant. Unless provided differently in the International Constitution's trial procedures, the formal investigation will result in a detailed confidential report for the Executive Board and Trustees, and a non-confidential summary for the complainant or the Membership. The investigation can make recommendations for appropriate action.
 - e) Taking appropriate action: Appropriate actions may include seeking reimbursement if AFSCME 189 has lost funds or providing reimbursement if the complainant has lost funds; counseling the accused regarding expectations; reassigning officer or employee

responsibilities or Stewards' representation areas; improving AFSCME 189's controls and policies; holding a mediated meeting between the complainant and accused; disciplining the officer, employee, or member with due process; or suspending or expelling a member from membership with due process.

Acknowledgement: This policy was modeled, in part, after an example by AFSCME 88 and training materials by Hirschfeld Kraemer LLP

Adopted: June 13, 2023

Membership Meetings and Decisions

201 Agenda

Reference

AFSCME International Member Bill of Rights, Article 7: “Members shall have the right to full participation, through discussion and vote, in the decision-making processes of the union, and to pertinent information needed for the exercise of this right. This right shall specifically include decisions concerning the acceptance or rejection of collective bargaining contracts, memoranda of understanding, or any other agreements affecting their wages, hours, or other terms and conditions of employment. All members shall have an equal right to vote and each vote cast shall be of equal weight.”

Policy

AFSCME 189 is a member-driven organization and encourages active participation by all members in decision-making. AFSCME announces meetings to its members and runs well-prepared meetings to save everyone’s time.

Membership Meetings

1. The Recording Secretary will announce the meeting time and place – not necessarily including an agenda – for General Membership meetings on the AFSCME 189 website, and in the NW Labor Press newspaper for members who may not have email access.
2. The Recording Secretary will publish an agenda at least 3 days before a General or Special Membership meeting. The Recording Secretary will publish the agenda in the member-wide email distribution list, and may post it on the website and workplace bulletin boards. The agenda will include information on how to attend the meeting in person or virtually, as applicable. Members can subscribe to the email distribution list on the AFSCME 189 website: www.afscme189.com/take-action/join-our-action-network
3. Members are encouraged to submit agenda items to the Recording Secretary 7 days before a General or Special Membership meeting.
4. Members can request to add an agenda item at the beginning of a General or Special Membership meeting.
5. Format of agenda items: Members are encouraged to research the issue and write a report, especially for complex or controversial items, to describe:
 - a. The recommended action (Example: The Membership is requested to approve up to \$X for Y purpose; text of a resolution; text of a policy change). Financial requests must include a specific or an “up to” dollar amount and a source line item in the current budget. Recurring or temporary requests should have a start and end date.
 - b. Background information (names, dates, event dates, context, similar actions from the past, links to other organization’s webpages, applicable policies)
 - c. Arguments for the recommendation, and for controversial items also arguments against the recommendation
 - d. Potentially, alternatives for controversial items
 - e. A report may be marked “confidential” when appropriate, including if it contains legal advice, legal strategy, bargaining strategy, AFSCME 189 financial information, or private member information.

Members can plan and discuss their agenda item with an officer, and officers will provide assistance to write a clearer, well-prepared report.

Executive Board Meetings

1. The Recording Secretary will announce the meeting time and place for Executive Board meetings 3 days before, including how members can attend the meeting.

Committee Meetings

1. Committee Chairs will publish an agenda at least 3 days before a Committee meeting, except for the Bargaining Committee Chair will publish the time and place of meeting (not necessarily with an agenda) at least 3 days before a Bargaining Committee meeting. The method of posting will be the same as for agendas for a General Membership meeting.

Adopted: June 13, 2023, replaces the prior Agenda policy from Sept 6, 2011

202 Membership Meetings

Reference

AFSCME International Member Bill of Rights, Article 7: “Members shall have the right to full participation, through discussion and vote, in the decision-making processes of the union, and to pertinent information needed for the exercise of this right. This right shall specifically include decisions concerning the acceptance or rejection of collective bargaining contracts, memoranda of understanding, or any other agreements affecting their wages, hours, or other terms and conditions of employment. All members shall have an equal right to vote and each vote cast shall be of equal weight.”

AFSCME 189 Constitution, Article V, requires monthly General Membership meetings.

Policy

1. AFSCME 189 will hold a General Membership meeting monthly and Special Membership meetings as needed.
2. Membership meetings are only open to members. Executive Board members may invite guests for a specific topic. Also refer to Policy 203 Childcare.

Adopted: June 13, 2023

203 Childcare

Policy

1. Children are welcome at AFSCME 189 meetings. To support members who have children, AFSCME 189 will provide childcare at in-person General and Special Membership meetings.
2. AFSCME 189 strives to pay prevailing wages for the Portland area and not less than AFSCME 132, Child Care Providers Together contract wages.
3. AFSCME 189 will use unionized childcare providers whenever possible and gives preference to members of AFSCME 132 Child Care Providers Together.

Procedure

1. Members needing childcare are encouraged to notify the Recording Secretary 3 days before the meeting.
2. The Recording Secretary or Treasurer will hire a childcare provider to be on standby or on duty for the in-person meeting, and are responsible for reserving an extra room if necessary.
3. AFSCME 189 authorizes the following rates as of July 2023: \$25 per hour for every 4 children (\$50 per hour for 5 to 8 children, and so on).¹
4. Provider sends invoice to Treasurer including their Employer Identification Number (EIN), Social Security Number, or Individual Taxpayer Identification Number (ITIN).
- 5.

Year	Amounts
July 2023 - June 2024	\$25
July 2024 – June 2025	TBD
...	...

Adopted: June 13, 2023, replaces the prior Childcare policy from Aug 13, 2019

¹ Amount per AFSCME 75 email from Aimee Olin to Bao Nguyen, May 22, 2023

210 Ratification Vote and Strike Authorization Vote

Reference

AFSCME International Member Bill of Rights, Article 7: “Members shall have the right to full participation, through discussion and vote, in the decision-making processes of the union, and to pertinent information needed for the exercise of this right. This right shall specifically include decisions concerning the acceptance or rejection of collective bargaining contracts, memoranda of understanding, or any other agreements affecting their wages, hours, or other terms and conditions of employment. All members shall have an equal right to vote and each vote cast shall be of equal weight.”

AFSCME 189’s Constitution provides in Article V, Section 4: “With regard to the ratification of any labor agreement and/or the authorization of any strike or interest arbitration, any such action shall only be done after a vote of the affected membership. The determination of whether and what to present to the membership for a vote, shall be made by the local union executive board upon recommendation of the relevant bargaining committee. In any such membership vote, the multiple workplace/workshift portable balloting method shall be used. The president, with the approval of the executive board shall establish a schedule of locations and times for the balloting.”

AFSCME International Constitution, Appendix D, Elections Code

Policy

1. This policy is distinct from membership elections for AFSCME 189 officers
2. The President appoints the Bargaining Committee members.
3. Contracts are ratified and strikes authorized with a simple majority of ballots submitted.
4. For ratification and strike authorization votes, voting methods authorized include: voice vote by acclamation at a membership meeting; show of hands vote at a membership meeting; and secret ballot.
5. A voting method that includes members submitting ballots electronically through a website is considered compliant with the “multiple workplace/workshift portable balloting method.”
6. The President and Executive Board may delegate the establishment of locations and times for balloting to an elections committee. The President may appoint an elections committee to conduct the membership vote; the elections committee will be responsible for presenting neutral and clear information on the vote to members, fairly counting the votes, and accurately reporting the vote results.
7. Voting by proxy for ratification or strike authorizations is not allowed.

Adopted: June 13, 2023

Officers, Executive Board, Committees

301 Governance

Reference

AFSCME International Member Bill of Rights, Article 7: "Members shall have the right to full participation, through discussion and vote, in the decision-making processes of the union, and to pertinent information needed for the exercise of this right. This right shall specifically include decisions concerning the acceptance or rejection of collective bargaining contracts, memoranda of understanding, or any other agreements affecting their wages, hours, or other terms and conditions of employment. All members shall have an equal right to vote and each vote cast shall be of equal weight."

AFSCME 189 Constitution, Article VII, Section 10: "The executive board shall be the governing body of the local union except when meetings of the local union are in session. All matters affecting the policies, aims and means of accomplishing the purposes of the local not specifically provided for in this constitution or by action of the membership at a regular or special meeting shall be decided by the executive board. The board shall meet at the call of the president or of a majority of the members of the board. A report on all actions taken by the executive board shall be made to the membership at the next following meeting. A majority of the members of the executive board shall be required for a quorum."

Policy 201 Agenda

Policy

1. The Membership of AFSCME 189 is the highest decision-making body and will lead AFSCME 189 and make decisions in accordance with principles of democracy.
2. Voting by proxy in Membership meetings is not allowed.
3. AFSCME 189 is a member-driven and member-led Union.
4. When the Membership of AFSCME 189 is not in session in a General or Special Membership meeting, then the Executive Board is the governing body of AFSCME 189. The Executive Board is accountable to the Membership through elections and reporting. Some decisions are reserved by the AFSCME 189 Constitution or policy to the Membership and thus cannot be taken by the Executive Board.
5. A member who voted with the prevailing side can make a motion to reconsider a decision only in the same meeting or the subsequent meeting.
6. A member can make a motion to rescind a Membership decision or Executive Board decision. A rescission requires a simple majority if the motion is announced with the agenda, announced in accordance with the Agenda policy, or a two-thirds majority vote if it is *not* announced with the agenda.
7. A motion to reconsider or rescind cannot be made for decisions that cannot be undone anymore, including: a contract approval when the other party to the contract has been notified, a payment that has been already made, an election to an officer position, or to re-open nominations.
8. The Executive Board generally meets twice a month to conduct business.
9. In rare urgent circumstances, it may be necessary for the Executive Board to make decisions in between its regular meetings. In these situations, discussions and motions by reply-all emails among the Executive Board are authorized and voting is authorized by email, phone call, text message, and proxy. Voting will remain open for a reasonable period of time, such as 2 business days, to enable more Executive Board members to participate.

Adopted: June 13, 2023

302 Responsibilities of Officers

Reference

AFSCME 189 Constitution, Article VII

Responsibilities for all Officers

1. Set goals, develop strategies, guide programs/activities, guide members, shape culture, improve processes
2. Represent the concerns and issues of members, including possibly divergent issues
3. Be a role model for AFSCME 189 values, such as inclusion, member-led decision making, good stewardship of Union funds
4. Engage and support members
5. Develop member-leaders for succession

President

1. Set goals, develop strategies, guide programs/activities, guide Executive Board, guide members, shape culture, improve processes – for all AFSCME 189 activities and for the long-term
2. Preside at all Membership and Executive Board meetings (per Constitution, Article VII, Section 1); facilitate large-group deliberative meetings and know parliamentary procedure
3. Approve financial transactions and review financial reports (per Constitution; AFSCME Financial Standards, Code Appendix C)
4. Appoint committees (per Constitution)
5. Report to the Membership regarding the progress and standing of AFSCME 189 (per Constitution)
6. Be a delegate to all conventions, seminars, etc. (per Constitution)
7. Build relationships with partner organizations; shape the political, social, and organizational environment; strategically collaborate with other unions
8. Expected to dedicate their full time (40 hours per week) to Union business, with additional evening/weekend meetings and travel to conventions; can take vacation/sick leave (see Policy 401 Union Leave and Lost Time)
9. Required to complete Financial Standards training

Vice President

1. Assist the President and fill in for the President in their absence (per Constitution, Article VII, Section 2)
2. Chair the Political Action Committee: Lobby elected officials and manage political campaigns
3. Facilitate large-group deliberative meetings and know parliamentary procedure
4. Approve some financial transactions (per Constitution)
5. Expected to dedicate about 20 percent of their time (8 hours per week) to Union business, with additional evening/weekend meetings and travel to conventions (see Policy 401 Union Leave and Lost Time)
6. Required to complete Financial Standards training

Treasurer (the Constitution calls this office the secretary treasurer)

1. Set goals, develop strategies, create programs/activities, guide Executive Board, guide members, shape culture, improve processes – related to finances and long-term financial health

2. Carry out most financial transactions (per Constitution, Article VII, Section 3; AFSCME Financial Standards Code, Appendix C)
3. Prepare an annual budget (per Constitution; AFSCME Financial Standards Code, Appendix C)
4. Keep financial records and report monthly to the Membership; report annually to the International (per Constitution; AFSCME Financial Standards Code, Appendix C)
5. Expected to dedicate about 10 to 20 percent of their time (4 to 8 hours per week) to the Treasurer role, plus additional time for other Union business, and additional evening/weekend meetings (see Policy 401 Union Leave and Lost Time)
6. Approve most financial transactions (per Constitution)
7. Required to complete Financial Standards training

Recording Secretary

1. Set goals, develop strategies, create programs/activities, guide Executive Board, guide members, shape culture, improve processes – related to meetings and records and institutional memory
2. Keep a record of Membership and Executive Board meetings (per Constitution, Article VII, Section 4 and AFSCME Financial Standards Code)
3. Required to complete Financial Standards training
4. Carry on the official correspondence (per Constitution)

Chief Steward

1. Set goals, develop strategies, create programs/activities, guide Executive Board, guide Stewards, guide members, shape culture, improve processes – related to enforcement of labor agreement, Stewards, and organizing current members
2. Reach out, provide services and information to members, including on workplace issues, interpretation of the labor agreement, and members facing potential discipline
3. Enforce the collective bargaining agreement (per Constitution Article VII, Section 5)
4. Facilitate Executive Board handling of grievances for widespread/complex issues
5. Select and approve the appointments of Stewards, dismiss Stewards (per Constitution)
6. Manage campaigns to organize members or drive issues
7. Expected to dedicate about 20 percent of their time (8 hours per week) to Union business, with additional evening/weekend meetings (see Policy 401 Union Leave and Lost Time)

Organizer

1. Set goals, develop strategies, create programs/activities, guide Executive Board, guide Stewards, guide members, shape culture, improve processes – related to organizing current and prospective members
2. Contact new employees in bargaining units, collect new membership applications (per Constitution, Article VII, Section 6)
3. Contact represented non-members (per Constitution)
4. Identify potential union activists (per Constitution)
5. Engage and support members
6. Maintain member list
7. Manage campaigns to organize members or drive issues

Communications Editor

1. Set goals, develop strategies, create programs/activities, guide Executive Board, guide Stewards, guide members, shape culture, improve processes – related to member communications and member engagement

2. Write, edit, produce, and distribute member communications (per Constitution, Article VII, Section 7)
3. Maintain website and social media channels

Chapter Chairs

1. Set goals, develop strategies, create programs/activities, guide Stewards, guide members, shape culture, improve processes – within their chapter
2. Represent the concerns and issues of members, including possibly divergent issues – for all members within their chapter
3. Each chapter has approximately 100 to 200 members
4. Lead Stewards over their chapters (per Constitution, Article VII, Section 8)
5. Recruit potential Stewards (per Constitution)
6. Coordinate chapter meetings (per Constitution)
7. Liaise and communicate between the chapter membership and the Executive Board (per Constitution)
8. Recruit and orient new members, retain existing members (outside of the Citywide new employee orientations hosted by BHR, other bargaining units should ensure to hold orientations at least every 90 days)
9. Co-manage or participate in organizing campaigns within their chapter to organize members or drive issues

Trustees

1. Not considered an Officer as defined by the AFSCME 189 Constitution, Article VI
2. Oversee or conduct the audit (per Constitution, Article VII, Section 9; AFSCME Financial Standards Code, Appendix C)
3. Ensure required reports are filed timely with AFSCME International and governmental bodies
4. Required to complete Financial Standards training
5. Remain independent from the Executive Board and the day-to-day business
6. Trustees are not voting members of the Executive Board; Trustees may have neither voice nor vote in the deliberations of the Board. The sole purpose for Trustees is to audit or to see that an audit is performed. An arms-length relationship between the Trustees and the Executive Board must be preserved to ensure the most objective possible audit. (AFSCME Financial Standards Code, Article XI, Section 1)

Incompatible offices

An individual can only hold one of the following offices at any given time: President, Vice President, Treasurer, Recording Secretary, Chief Steward, Organizer, Communications Editor, Chapter Chair, Trustee.

Adopted: June 13, 2023

304 Responsibilities of Stewards, Member Action Team Leaders, and Committee Chairs

Stewards

1. Stewards are frontline Union leaders who are in direct and close contact with members in their workgroup
2. Each Steward workgroup contains approximately 10 to 20 members
3. Recruit and orient new members, retain existing members within their workgroup
4. Reach out, provide services and information to members, including on workplace issues, interpretation of the labor agreement, and members facing potential discipline
5. Enforce the labor agreement through grievances for individual/simple issues
6. Carry out campaigns
7. Stewards are appointed and dismissed by the Chief Steward. Chapter Chairs and Stewards can nominate new Stewards. Interested members can nominate themselves to become Stewards.
8. Stewards are required to complete Steward training offered by AFSCME 189 or AFSCME 75
9. Stewards develop member leaders for succession and have a succession plan

Member Action Team Leaders

1. Member Action Team Leaders are frontline Union leaders who are in direct and close contact with their Membership
2. Recruit and orient new members, retain existing members within their organizing campaign assignment
3. Reach out, provide services and information to members
4. Carry out organizing campaigns
5. Member Action Team Leaders are appointed and dismissed by the Chief Steward. Chapter Chairs and Stewards can nominate new Member Action Team Leaders. Interested members can nominate themselves to become Member Action Team Leaders.

Committee Chairs

1. Set goals, develop strategies, guide programs/activities, guide committee members, shape culture, improve processes – within their committee's topic or service area
2. Chair committee meetings, report progress and results to the Membership, keep a record of committee meetings
3. Facilitate large-group deliberative meetings and know basic parliamentary procedure
4. Committee chairs develop member leaders for succession

Adopted: June 13, 2023

305 Committees

Reference

AFSCME 189 Constitution, Article VII, Section 1 describes the President's role: "The president shall appoint all standing committees and all special committees of the local, subject to the approval of the general membership at a regular meeting."

Policy 201 Agenda

Policy for forming and discontinuing a committee, and committee business

1. Committees provide a service to AFSCME 189 and its members that is narrower than the overall AFSCME 189 mission. Serving on a committee is an opportunity for members to become more involved in AFSCME 189.
2. The Membership may form a new committee by vote at a Membership meeting. The President may form a new committee, subject to approval at a subsequent regular General Membership meeting (Constitutional requirement). To permanently dissolve an existing committee, unless the AFSCME 189 Constitution requires the committee, the Membership has to approve at a regular meeting.
3. A committee may go on hiatus for a specific or undetermined amount of time if it has no business to conduct. For example, the Policy Committee may go on hiatus for a few months or years until a policy review or policy revision is needed; the Political Action Committee may go on hiatus until the next election cycle.
4. All members are eligible to serve as committee member, unless the committee has some minimum requirements or has filled all seats. The President appoints members to serve on a committee and removes them. The President appoints and removes chairs for committees. The President may appoint themselves as committee chair. The President is a member of all committees except the Election Committee, or unless the President withdraws.
5. Any member may attend a committee meeting to observe its business.
6. The Recording Secretary is authorized to add and update descriptions for committees in this policy following a Membership vote, without the 2-week advance posting.

Executive Committee

1. Mission: Give advice to the President on strategic and complex issues; also serve as Grievance Committee
2. Chair: President
3. Membership: President, Vice President, Treasurer, Recording Secretary, Communications Editor, Organizer, Chief Steward. The Executive Committee excludes Chapter Chairs.
4. Meetings: As needed

Executive Board (per Constitution)

1. Mission: Refer to Article VII Section 10 of the AFSCME 189 Constitution: The executive board shall be the governing body of the local union except when meetings of the local union are in session. All matters affecting the policies, aims and means of accomplishing the purposes of the local not specifically provided for in this constitution or by action of the membership at a regular or special meeting shall be decided by the executive board. The board shall meet at the call of the president or of a majority of the members of the board. A report on all actions taken by the

executive board shall be made to the membership at the next following meeting. A majority of the members of the executive board shall be required for a quorum.

2. Chair: President
3. Membership: President, Vice President, Treasurer, Recording Secretary, Communications Editor, Organizer, Chief Steward, Chapter Chairs
4. Meetings: Generally once or twice each month. Meetings are open to all members to observe.

Political Action Committee (PAC)

1. Mission: Develop recommendations for political action to be adopted by the Membership, prepare endorsement decisions for the Membership
2. Chair: By custom, the Vice President is the Chair of the Political Action Committee, unless decided otherwise by the President
3. Membership: Open to all members
4. Meetings: As needed, especially before elections
5. Services and reports provided by the committee: Interview process for candidates and campaigns, report with recommended endorsements/opposition/no position to the Membership

Policy Committee

1. Mission: Research policy issues and prepare policies for adoption by the Membership
2. Chair: Appointed by the President
3. Membership: Open to all members
4. Meetings: In January 2025, and every five years afterwards, and additional meetings as needed
5. Services and reports provided by the committee: Review existing policies, draft new policies

Bargaining Committee

1. Mission: Engage members in the collective bargaining process, channel members' concerns and issues to the Bargaining Team, give advice to the Bargaining Team on potential proposals and responses to management's proposals, support the Bargaining Team. The Bargaining Committee does **not** bargain directly with management.
2. Chair: Appointed by the President
3. Membership: The Bargaining Committee is larger than the Bargaining Team. The Bargaining Team is part of the Bargaining Committee. Open primarily to members of the bargaining unit that is covered by the relevant contract (main contract, Auditor's Office, Independent Police Review, Port of Portland). Members should be able to commit to attend the numerous and lengthy meetings that are expected over the course of collective bargaining.
4. Meetings: As needed

Bargaining Team/Bargaining Delegation

1. Mission: Collective bargaining, inform and engage the Bargaining Committee, write proposals, respond to management's proposals, approve tentative agreements, recommend ratification or strike to Membership
2. Chair: Appointed by the President
3. Membership: The Bargaining Team is smaller than the Bargaining Committee. The Bargaining Team is part of the Bargaining Committee. Number seats may be very limited. Open primarily to members of the bargaining unit that is covered by the relevant contract (main contract, Auditor's Office, Independent Police Review, Port of Portland). Members should be able to

commit to attend the numerous and lengthy meetings that are expected over the course of collective bargaining.

4. Meetings: As needed. Bargaining preparation meetings and bargaining meetings are generally **not** open to the membership.

Nominating Committee (per Constitution)

1. Mission: Available but not required per AFSCME 189 Constitution to make nominations for officer elections
2. Chair: Appointed by the President
3. Membership: Open to all members. All Nominating Committee members are ineligible to run for office in that election.
4. Meetings: As needed
5. Services and reports provided by the committee: Identify and vet potential candidates for officer positions, nominate candidates for officer elections

Election Committee (per Constitution)

1. Mission: Conduct elections neutrally and fairly, when necessary, including officer elections and bargaining ratification/strike votes
2. Chair: Appointed by the President
3. Membership: Open primarily to members of the bargaining unit that is affected by the election. President is not a member, per the Constitution. All Election Committee members are ineligible to run for office in that election.
4. Meetings: As needed
5. Services and reports provided by the committee: Verify candidate eligibility and decide challenges to candidate eligibility, create ballots, administer the “multiple workplace/workshift portable balloting method” as needed, present neutral and clear information on the vote to members, ensure ballot secrecy, fairly count votes, accurately report results, resolve election protests

Grievance Committee

1. Mission: Provide strategic direction and advice on grievances that affect widespread issues or are complex; approve moving grievances to binding arbitration
2. Chair: President
3. Membership: See Executive Committee description. A majority of the members of the executive committee shall be required for a quorum.
4. Meetings: As needed

Adopted: June 13, 2023

306 Development of Member Leaders

Policy

AFSCME 189 is committed to developing leaders from among its broad membership. Every officer and steward is responsible for identifying, recruiting, and developing member leaders as a core responsibility of their position. AFSCME 189 will continue leadership development through a combination of one-on-one coaching and mentoring, providing training to members, and encouraging member leaders to assume larger responsibilities within the Union and labor movement. AFSCME 189 values the diverse experiences and skills members already bring and strives to give member leaders additional knowledge, skills, and experiences to be successful in their role and prepare them to assume larger responsibilities. Member leaders are encouraged to exceed the knowledge and skills expectations for their role.

Opportunities for leadership development within the Union include:

1. Serving as Steward or Member Action Team Leader
2. Serving as a Committee member, delivering a Union program or activity, participating in an organizing campaign
3. Participating in training and incorporating new skills and knowledge into Union activities
4. Participating in bargaining
5. Participating as AFSCME 189 delegate in conventions
6. Serving as officer

Acknowledgements: This policy was modeled, in part, after an example by SEIU 503

Adopted: June 13, 2023

307 Oath of Office

Reference

AFSCME International Constitution Appendix B

Policy

In accordance with the AFSCME International Constitution, each new officer is required to subscribe to the Officer Obligation:

I, [name], promise and pledge that I will perform faithfully and with honor the duties of the office which I now assume in the American Federation of State, County and Municipal Employees. I pledge to fight for a society where all workers can seek economic and social justice through participation in their union and our democracy. I will work for these goals by organizing unorganized workers, mobilizing workers to participate in the political process, and fighting to gain and defend the best possible working standards through contracts and legislation. I acknowledge that it is a privilege to serve in this office and I promise that I will deliver to my successor in office all books, papers and other property of this union which are in my possession at the close of my official term.

Adopted: June 13, 2023

310 Officer Attendance

Reference

AFSCME 189 Constitution, Article VII, Section 11 defines excused absences and requires meeting attendance for officers.

Policy

Any Officer who misses both the scheduled Executive Board meeting and the General Membership meeting in a calendar month will have that month's stipend canceled.

Procedure

1. Officers who need an excused absence will notify the President ahead of the meeting. Absences will be excused for: health, family or work emergencies, scheduled vacations or shift work, and other circumstances normally considered reasonable cause for absence from work.
2. The Recording Secretary or their designee is responsible for tracking attendance and notifying the President and Treasurer of unexcused absences or absences that would result in the stipend cancellation.
3. Upon the President's direction, the Treasurer will cancel the stipend as required by this policy.

Adopted: June 13, 2023, replaces the prior Attendance policy from Sept 6, 2011

3 | Conflict of Interest

Policy

AFSCME 189 expects its Officers, Trustees, Committee members, and Stewards to act in the best interest of AFSCME 189. They must disclose potential, perceived, and actual conflicts of interest, and are encouraged to abstain from conflicted decisions.

Guidelines

1. Whenever an officer, Executive Board member, Trustee, Committee member, or Steward has a financial or personal interest in a matter being discussed or decided in a General or Special Membership, Executive Board, Committee meeting, or employee representation matter, they should:
 - a) Assess the conflict of interest for significance; they may consult another Executive Board member for advice
 - b) If found to have a significant conflict of interest, actual or perceived, they should fully disclose the nature of the conflict, and are encouraged to withdraw from the discussion, and are encouraged to abstain from voting on the matter.
 - c) The minutes of the meeting should record that the member has disclosed a conflict and, if applicable, the abstention.
2. Members who do not have an Executive Board member, Committee member, or Steward role are encouraged to follow this procedure.
3. Conflicts of interest include:
 - a) Being a vendor who derives a financial benefit from AFSCME 189 funds
 - b) Participating in another organization that derives a benefit from AFSCME 189, including funding, political endorsement, and community grant. Participation in another organization that opposes AFSCME 189 or an AFSCME 189 decision. Participation in the other organization is more significant if holding a leadership position or decision-making role.
 - c) Approving or handling a financial transaction or a representation issue that benefits themselves. For example, it may be a conflict of interest for a Steward to represent themselves in a Union representation issue.
 - d) Having close affinity with a person or organization. For example, it may be a conflict of interest for a Steward to represent a member who is a close personal friend of the Steward's.
 - e) Having received external influence or pressure to make a certain decision. For example, if a potential recipient of funds gave a member a valuable gift, that presents a conflict of interest.
 - f) Being a supervisor or manager with the employer covered by AFSCME 189's collective bargaining agreement
 - g) Reviewing, investigating, or auditing one's previous decisions. For example, it is a conflict of interest for a Steward to represent a member if the Steward has prior involvement in the issue, such as the Steward being a lead worker over the member or the Steward having made a complaint to HR or management on this issue. For example, it would be a conflict of interest for the Treasurer to become a Trustee and then audit their own financial transactions, or for an officer to investigate a misconduct allegation against themselves.
 - h) Family or household member being in any of the above roles or situations

4. Excluded from the requirements of this policy are (no disclosure or abstention required):
 - a) Members voting or advocating for themselves to receive financial assistance within the requirements of the Financial Assistance to Members policy
 - b) Members voting on, advocating for or against, or drafting proposals for wages, hours, and working conditions during collective bargaining; this also includes strike and ratification votes
 - c) Members receiving a financial benefit that is available to the general public or to a general segment of members regardless of their AFSCME 189 role or decision. For example, a sports apparel discount pass made available to all City of Portland employees generally does not present a significant conflict of interest if AFSCME 189 was deciding a matter involving that sports apparel company.

Acknowledgements: This policy was modeled, in part, after an example by AFSCME 328

Adopted: June 13, 2023

312 [Reserved:] Officer Leave of Absence and Resignation

Will be drafted summer/fall 2023

Union Activities

401 Union Leave and Lost Time

References

1. AFSCME Financial Standards Code, Appendix F, Section on Lost Time Payments
2. Refer to the article on Union Representation in the collective bargaining agreement
3. Refer to House Bill 2016 of the 2019 session (ORS 243.650 and following)
4. Policy 605 Education

Policy

1. To conduct the business of the Union, AFSCME 189 encourages the use of Lost Time (also known as Loss Time, Union Leave Union Paid, ULUP) by Executive Board members, stewards, and designated members within the priorities and limits of this policy, AFSCME 189 budget, limits in the labor agreement, and other applicable rules.
2. If Union Leave **City** Paid (ULCP) is available per law or per labor agreement, it should be used **before** using Union Leave Union Paid.
3. AFSCME 189 will not provide ULUP outside of the member’s regular work hours or work shift, when it results in overtime or exceeding a 40-hour workweek, on City holidays, or on City sick leave.
4. The annual budget should specify how much AFSCME 189 is planning to spend on ULUP. The Treasurer will monitor the ULUP budget and spending trends.

Union Leave City Paid (ULCP)	Union Leave Union Paid (ULUP)		
Events or Activities	Events or Activities	Amount authorized	Approval required from
<ul style="list-style-type: none"> • Bargaining meetings and preparation caucus meetings • Providing information regarding collective bargaining agreement to newly hired employees (30 minutes) • Investigating grievances; attending investigatory meetings and due process hearings: ULCP first, ULUP minimally • Attending labor-management meetings • Participating in or preparing arbitration, administrative hearings, and Employment Relations Board proceedings • Testifying in a legal proceeding under subpoena <p>Amount See contract limits</p> <p>Approval required from President or Council Representative</p>	Advice on bargaining or members beyond the contractually authorized bargaining team		Chief Steward or Council Representative
	Meetings to recruit new members, worksite meetings, member celebration/recognition meetings	2 hours	Chief Steward
	Campaigns to organize members or issues (not political campaigns)	Executive Board	
	Convention attendance including travel time	Membership approves funds and names delegates	
	Training attendance including travel	Membership or Executive Board approves funds and names delegates	
	Executive Board members attending Executive Board meetings and General or Special Membership meetings only if their normal work shift overlaps part or all of the meeting	Meeting time + reasonable travel	Officer approves their own time

President to conduct Union activities	Up to full-time	President approves their own time ²
Vice President to conduct Union activities	Up to 20% averaged over the year	Officer approves their own time; above 20% requires pre-approval by President
Treasurer: Year-end reporting and reporting to International	No limit	Officer approves their own time
Treasurer: general financial management, processing payments	Up to 20% averaged over the year	
Trustees and Treasurer: audit	16 hours for every audit	Officers approve their own time
Executive Board members activities (excluding bargaining, training, meetings named above)	Officer approves their own time up to 10% of their time per month; above 10% requires Executive Board pre-approval	
Meetings among Executive Board members	No ULUP authorized, these meetings should be held outside of work hours	
For all-day events, training, and offsite meetings, additional ULUP up to 2 hours is authorized to complete a full work shift to avoid members going back to in-person work; not applicable for telework or on-site meetings		Treasurer

Approval and Payment Procedure

<p>1. Members requesting ULCP are encouraged to get verbal pre-approval from the President or Council Representative.</p> <p>Members should directly notify their work supervisor of their intent to take ULCP.</p> <p>Members are reminded that the employer may deny or delay ULCP for their operational needs and there is a maximum number of ULCP hours per labor agreement.</p>	<p>1. Members requesting ULUP must get verbal pre-approval from the President or their designee. The President has authorized the Treasurer and Council Representative each as pre-approvers of all ULUP, in addition to the pre-approvers listed above for specific events. Members must then fill out the AFSCME 189 website form to notify the Treasurer who will notify the City supervisor/manager.</p> <p>Members are also encouraged to notify their work supervisor directly of their intent to take ULUP, as early as possible. Members are reminded that the employer may deny or delay ULUP for their operational needs.</p> <p>Members are reminded that taking ULUP may affect their eligibility for Family Medical Leave and they may want to work at least 1 day per calendar month to maintain City-paid health benefits.</p> <p>Executive Board members can approve their own ULUP if authorized in this policy, and subject to budget limits.</p>
<p>2. Members should generally enter “ULCP” or “ULUP” into their City of Portland SAP timesheet, unless their supervisors have different timesheet directions.³</p>	<p>3. Any member claiming ULUP must provide a written report of actual ULUP taken to the Treasurer within a week of taking the</p>

² City SAP timesheet should clearly distinguish ULCP, ULUP, City work, and vacation/sick/other leaves

³ Employees in newly recognized bargaining units may not have these SAP codes enabled and should check with their supervisors if “OHWP” (zero, not the letter O) can be used.

	<p>lost time. This report must include the date, actual hours taken, and the Union purpose.</p> <p>If the written report is not provided, and attempts to address the issue with the member have not been successful, the Treasurer will notify the employer, upon being billed for the time, that the time was unauthorized and it should be charged back to the member as vacation. If ULUP time was approved for attendance at an event or meeting and the member did not attend, AFSCME 189 will not reimburse the employer for ULUP; the member will be responsible for arranging alternative leave with the employer.</p>
<p>4. ULCP will be paid at the member’s regular rate of pay through the regular City payroll by the City.</p>	<p>4. ULUP will be paid at the member’s regular rate of pay through the regular City payroll, and the Treasurer is authorized to pay back to the City the value of ULUP plus wage-driven taxes and benefits.</p> <p>5. [Reserved for wage differential/wage premium policy to be written summer 2023]</p>
<p>6. A member who conducts ULCP/ULUP-eligible Union business on their vacation time is also eligible for reimbursement from AFSCME 189 with written pre-approval from the President or designee. Members should consider City of Portland and bureau outside employment rules. This reimbursement may be processed as wages and may be subject to income and payroll tax. No premiums or differentials will be paid for this vacation time reimbursement.</p>	

Adopted: June 13, 2023, replaces the prior Lost Time policy from unknown date and Other Budget Related Policies from Dec 4, 2008

410 Strike

Reference

Article on strikes in collective bargaining agreement
Policy 210 Ratification Vote and Strike Authorization Vote

Policy

1. When AFSCME 189 or the employer declares impasse during bargaining, AFSCME 189 should consider whether or not to hold a strike authorization vote to strengthen the Union's negotiation position. A strike authorization does not necessarily mean that a strike will take place.
2. When another City of Portland or Port of Portland union is on strike, AFSCME 189 members should refuse to perform work which is normally performed by the striking employees and report any such requests to the Executive Board.

Adopted: June 13, 2023

420 Contract Enforcement, Grievances, and Arbitration

Reference

Refer to the grievance procedure in the collective bargaining agreement

Policy

1. AFSCME 189 will enforce and defend the terms of its collective bargaining agreements and pursue grievances if necessary.
2. AFSCME 189 will meet its duty of fair representation of bargaining unit employees.
3. Moving a grievance to binding arbitration requires approval by the Grievance Committee.
4. Legal advice to AFSCME 189 is confidential and for internal use only, especially when it relates to strategy for grievances and arbitration.

Procedure

1. Any bargaining unit employee can initiate a grievance and AFSCME 189 can initiate a grievance without the consent of affected employees. Members are encouraged to work with their Steward. When the employer's contract violation is a simple or relatively minor issue, or limited to a few people or a small workgroup, members or Stewards can pursue the grievance and are encouraged to inform or consult with the Chief Steward and Council Representative. When the contract violation is a major or complex issue, or affects large workgroups or the entire membership, generally the Chief Steward or Council Representative should take the lead and consult with the Executive Board and get legal advice. Note that Level 1 grievances must be filed within 30 days of the violation.
2. To decide whether to move a grievance to binding arbitration, the Grievance Committee will consider the Council Representative's recommendation, the merits of the grievance, the probability of success, the impact on the Membership, the expenses and resources required to continue the grievance, and the time anticipated to resolve the grievance. For complex issues, a written report including recommendation and arguments for/against should be provided to the Grievance Committee beforehand. The Grievance Committee can, but is not required to, invite the affected member(s) to make their case. The Grievance Committee can obtain legal advice.
3. If it is decided **not** to go to arbitration, the Council Representative will inform the affected member(s) in writing within 3 business days, including their appeals opportunity. Affected members can appeal a decision by the Grievance Committee to decline moving to binding arbitration to the Executive Director of AFSCME Council 75 within a time specified. The Executive Director of AFSCME 75 will review the decision under the standards and policies of AFSCME 189.
4. The Council Representative will keep the Grievance Committee informed of arbitration updates, including scheduling, settlement offers, and final decisions. Settlements require approval of the Grievance Committee.
5. Information affecting members' privacy should not be discussed in a Membership meeting.

Adopted: June 13, 2023

42I Bargaining Unit Defense

Policy

AFSCME 189 will defend the bargaining units it represents against layoffs, position reductions, contracting out, non-bargaining unit employees taking on bargaining unit work, and reclassifications that would subtract positions from the bargaining unit.

Procedure

1. For layoffs, position reductions, and contracting out, see the relevant sections of collective bargaining agreements.
2. For non-bargaining unit employees taking on bargaining unit work, follow the grievance policy.
3. For reclassifications, the City of Portland usually provides a reclassification notice and explanation to the Council Representative. The Council Representative should discuss this with the affected members, Stewards, and Chapter Chairs.

Adopted: June 13, 2023

422 Unfair Labor Practice Complaints and Other Litigation

Reference

Oregon Public Employees Collective Bargaining Act (PECBA), ORS 243.650 - 243.806
Employment Relations Board's User Guide "Questions and Answers – PECBA Unfair Labor Practice Cases"

Policy

1. AFSCME 189 will enforce and defend its rights and the rights of its members and prospective members afforded by the Oregon Public Employees Collective Bargaining Act, and pursue Unfair Labor Practice complaints or other litigation if necessary.
2. Filing of an Unfair Labor Practice (ULP) complaint with the Oregon Employment Relations Board or a legal complaint or amicus brief in court in AFSCME 189's name requires approval by the Executive Board. The Executive Board can consider the Council Representative's recommendation, the merits of the complaint, the probability of success, the impact on the Membership, and the expenses and resources required to resolve the complaint, and the time anticipated to resolve the complaint. For complex issues, a written report including recommendation and arguments for/against should be provided to the Executive Board beforehand. The Executive Board can, but is not required to, invite the affected member(s) to make their case. The complaint will be prepared by an attorney. Note that the deadline to file a ULP complaint is within 180 days of the violation.
3. Settlements require approval of the Executive Board.
4. Legal advice to AFSCME 189 is confidential and for internal use only, especially as it relates to strategy for litigation.

Adopted: June 13, 2023

43I Conventions

Policy

1. Per AFSCME 189's Constitution, the President is an automatic delegate to conventions of AFSCME Council 75, the Northwest Oregon Labor Council, and AFSCME International.
2. AFSCME 189 aspires to regularly send delegates to Oregon and International conventions to represent the Local and the Portland community.

Adopted: June 13, 2023

432 Convention Resolutions

Policy

Any member in good standing may prepare a resolution to be presented at a convention to which AFSCME 189 sends delegates. The Executive Board will endorse, modify, or reject the resolution on behalf of AFSCME 189.

Procedure

1. Whenever possible, members will submit draft resolutions to the Executive Board for endorsement 45 days prior to the convention's resolution deadline. The Executive Board may: endorse the draft resolution as is, modify the resolution prior to endorsement, or reject the resolution.
2. A proposed resolution that has not been endorsed by the AFSCME 189 Executive Board will not be presented at a convention on behalf of AFSCME 189. The member can introduce the resolution as an individual under the rights allowed to them in the convention rules. If an individual delegate presents a resolution at the convention that has not been endorsed by the AFSCME 189 Executive Board, the AFSCME 189 delegation is not required to support the resolution.

Acknowledgement: This policy was modeled after an example by AFSCME 328

Adopted: June 13, 2023

Financial Planning and System

501 Financial Management

References

AFSCME 189 Constitution, Article VII, Section 3: The secretary-treasurer will prepare and submit an annual budget for the local for approval by the membership.

AFSCME Financial Standards Code requires a budget for locals with 2,000 members.

Policy

1. The fiscal year runs from January 1 through December 31.
2. Budget process: The Executive Board will give strategic direction and priorities for an annual budget. Members may give input during budget development. The Treasurer will draft an annual budget by October 31 of each year and bring it to the November or December General Membership meeting for adoption.
3. The budget should generally not have an operating deficit, meaning the planned expenses should be less or equal to the planned resources. If withdrawals from reserves or prior-year unspent budget would cover expenses in the budget, it should be called out specifically.
4. During the budget year, additional withdrawals from reserves to cover expenses requires a vote of the Membership.
5. The budget and financial records that would show the overall AFSCME 189 financial position are confidential and for AFSCME-internal use only.
6. The Treasurer is authorized to make inter-account transfers to facilitate approved activities.
7. The Treasurer is authorized to deposit dues and other receipts, and to make inter-account transfers to put funds in the correct accounts.
8. The Treasurer is authorized to record receipt of earned interest.
9. The Treasurer is authorized to pay usual and customary bank account charges.

Adopted: June 13, 2023, partially replaces the prior Budget policy from Dec 4, 2008

502 Bank Signatories

Reference

AFSCME International Financial Standards Code

Policy

1. Only the President, Vice President, Recording Secretary, and Treasurer are authorized to serve as signers on AFSCME 189 financial accounts. Any changes in the people holding these positions must be documented in General Membership meeting minutes declaring Union authorization for them to act as signatory.

Procedure

1. For any and all financial accounts to which they are an authorized signer, any person leaving the above-mentioned position(s) must, within 30 days of vacating the office, remove themselves as signers. Any person elected into the above-mentioned position(s) must within 90 days of taking office coordinate with the existing authorized signers, to become an authorized signer on any and all relevant financial accounts. They must provide a copy of minutes declaring the union authorization for them to act as a signatory on the account and a copy of their government-issued ID along with any new signer agreements filled out in their entirety.

Adopted: June 13, 2023, revises the prior Bank Signatories policy from March 8, 2016

503 Financial Controls and Separation of Duties

Reference

AFSCME Financial Standards Code, Article VII, Section 9 relates to electronic transactions
 AFSCME Financial Standards Code, Article VII, Sections 10 and 11 relate to bank cards
 Policy 311 Conflict of Interest

Policy

1. To protect AFSCME 189’s financial assets and reduce opportunities for theft, loss, fraud, and abuse, the Executive Board will implement a system of sufficient financial controls and monitor the system.
2. AFSCME 189 generally prohibits the use of credit and debit cards issued to AFSCME 189 or an AFSCME 189 officer. Instead, members may use their personal credit or debit card and then seek reimbursement from AFSCME 189 for authorized expenses.
3. AFSCME 189 generally follows the principle of two approvers for outgoing payments, as established by AFSCME International’s Financial Standards Code.
4. Fragmenting financial transactions into multiple smaller transactions to circumvent dollar limits is prohibited.

Procedure

Specific internal controls are:

1. Bank accounts: Control over bank account signatories; documentation, reconciliation, and reporting will be in accordance with the AFSCME Financial Standards Code
2. Separation of duties for check payments: Every check payment requires two signatures on the check and review of the expense report/receipts/authorization by both signatories. If a check is over \$1,000 and payable to an Executive Board member, it cannot be signed by the Executive Board member who is receiving the funds.
3. Controls for electronic payments: Every electronic funds transfer out of AFSCME 189 bank accounts requires review and approval by two signatories. These transactions also require reconciliation by the Treasurer plus another Executive Board member.
4. Separation of duties for payroll processing: Every paycheck transaction requires review and approval by two signatories. These transactions also require reconciliation by the Treasurer plus another Executive Board member. Password protections on the payroll processing account will be maintained.
5. In July 2024 and every July after that, the dollar amounts in this policy are authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by AFSCME 189 labor agreement.

Year	Inflation factor	Amounts
July 2023 – June 2024	n/a	\$1,000
July 2024 – June 2025	TBD	TBD
...

Adopted: June 13, 2023

504 Cash Handling

Reference

- AFSCME Financial Standards Code, Article II, Section 4 relates to petty cash
- AFSCME Financial Standards Code, Article IV relates to cash income
- AFSCME Financial Standards Code, Article VI, Section 1 prohibits cash withdrawals from bank accounts
- AFSCME Financial Standards Code, Article VII, Section 7 relates to petty cash

Policy

AFSCME 189 generally prohibits handling cash involving AFSCME 189 funds. This includes receiving cash; instead, revenues should be received by check or electronic transfer. This includes withdrawing and disbursing cash; instead, payments should be made by check. This includes storing and transporting cash, maintaining a cash box at AFSCME 189 offices or outside events, and petty cash.

Procedure

1. Members may make eligible purchases using their own cash and then seek reimbursement from AFSCME 189 with receipts and expense reporting.
2. Separation of duties for cash handling: Even though cash handling is generally prohibited by AFSCME 189 policy, in the rare exceptional circumstance when more than \$500 cash in AFSCME 189 funds needs to be transported or transacted, at least 1 Executive Board member and 1 other member must be present at all times and both must sign and account for the cash at the beginning and at the end.
3. In July 2024 and every July after that, the dollar amounts in this policy are authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by AFSCME 189 labor agreement.

Year	Inflation factor	Amounts
July 2023 - June 2024	n/a	\$500
July 2024 – June 2025	TBD	TBD
...

Adopted: June 13, 2023

505 [Reserved:] Revenues Other Than Dues

Will be drafted in summer/fall 2023

506 [Reserved:] Investments and Deposit Insurance

Will be drafted in summer/fall 2023

507 Audit by Trustees

Reference

AFSCME 189 Constitution, Article VII, Section 9 requires an audit by Trustees at least semi-annually.

The AFSCME International's Financial Standards Code, Article XI, has more detail.

AFSCME International also has a Trustees Audit Guide.

Policy

1. Trustees should generally audit the period of January 1 through June 30 and the period of July 1 through December 31.
2. Trustees should begin the audit no later than 30 days after the end of the period under audit and complete the audit no later than 6 months after the end of the period under audit.
3. Should a need be determined by the officers, Membership, or Trustees, an audit may also be performed at other times.
4. The audit should be performed by an accounting firm selected by Trustees when required by AFSCME Financial Standards Code. When not required, Trustees may choose to self-perform the audit or select an accounting firm after evaluating the knowledge and skills needed to complete the audit, and the complexity and risks of the finances of the period to be audited.

Adopted: June 13, 2023

508 Purchasing

Reference

- AFSCME Financial Standards Code, Articles V, VI, and VII relate to expenditures
- Policy 509 Preference for Unionized Vendors, and Boycotted Vendors
- AFSCME Financial Standards Code, Appendix C and F suggest multiple vendor bids and competitive bidding; Appendix F suggests prohibition on extravagant or unnecessary expenditures.

Definitions

- Professional services: distinct from regular services in that highly specialized knowledge is provided or a highly regulated environment exists; including: architects, engineers, lawyers, accountants, physicians, auditors, consultants, customized IT work, financial advisers, investment managers, realtors, and similar services
- Services: all other services that are not professional services; for example: transportation/delivery of items, printing, mailing, graphic design, childcare, interpretation, off-the-shelf software subscriptions/web services, commercial banking, transcription
- Goods: supplies, equipment, materials, including intangible and intellectual property; for example: food, office supplies, apparel, machines, computers, software licenses

Policy

1. Purchases for AFSCME 189 should be made with regard to quality, cost, stewardship of member dues, and in accordance with Policy 509: Preference for Unionized Vendors, and Boycotted Vendors
2. Fragmentation of purchases to stay below the dollar limits is not allowed.
3. In July 2024 and every July after, the dollar amounts in this policy are authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by an AFSCME 189 labor agreement, and to be rounded to the nearest \$500 increment.

Year	Inflation factor	Amounts	Rounded Amount
July 2023 – June 2024	n/a	\$5,000/\$10,000	\$5,000/\$10,000
July 2024 – June 2025	TBD	TBD	TBD
...

Guidelines

1. Adherence to the following guiding principles is encouraged:
 - a) Purchases between \$5,000 and \$10,000 after comparing prices of several vendors
 - b) Purchases greater than \$10,000 after formally comparing several vendors with a written scoring rubric and written bids or price quotes. This can be accomplished with a Request for Proposal process.
 - c) Combine repeated purchases of the same goods or services or from the same vendor when possible, to obtain volume discounts and economies of scale
 - d) A written contract will be signed and kept in AFSCME 189 records for:
 1. Goods or services above \$5,000
 2. All professional services regardless of dollar amount
 3. For all complex, controversial, or risky purchases
 - e) For complex, controversial, or risky transactions, legal counsel will give advice on the contract terms.

- f) Contracts with vendors should generally include the following clauses to protect AFSCME 189:
 1. Clear deliverables and ownership of deliverables and AFSCME 189 data
 2. Maximum compensation amount
 3. Termination clause favorable to AFSCME 189
 4. Warranties and representations from the vendor
 5. Insurance requirements on the vendor

Adopted: June 13, 2023

509 Preference for Unionized Vendors, and Boycotted Vendors

Policy

1. When AFSCME 189 funds are used to purchase goods or services, preference should be given to unionized vendors, vendors that have good relations with their workforce, vendors that are not under strike, and Made in USA goods.
2. AFSCME 189 may boycott certain vendors that have committed unfair labor practices, violated their labor agreement or labor law, in solidarity with striking employees or organizing employees, or to advance labor movement goals.
3. AFSCME 189 may boycott all vendors within a state, county, or city if their laws or policies are anti-worker or harmful.
4. AFSCME 189 funds should not be spent on boycotted vendors, unless there is an emergency or no alternative or a good reason.

Procedure

1. When members purchase goods or services using AFSCME 189 funds or seeking reimbursement from AFSCME 189, they should consider whether the vendor or their competitors/alternatives are unionized and give preference to unionized vendors. This includes catering for meals/food at Union meetings, printing/ mailing services, apparel purchases, airlines and hotels for Union-related travel, and hotels/meeting venues for hosting Union meetings.
2. For example, as of April 2023, the following vendors are unionized:

Catering/food	Fred Meyer Safeway/Albertsons QFC
Mailing	US Postal Service UPS
Apparel and promotional items	Franks Doolittle Morel Inc.
Airlines	Alaska Southwest United American
Hotels	
Venues	Oregon Convention Center

The Recording Secretary is authorized to update this example list without going through the policy change process of posting and Membership vote.

3. The Membership or Executive Board may add vendors to and remove vendors from the boycott list. The Recording Secretary is authorized to update the boycott list in this policy following a vote of the Membership or Executive Board. A boycott vote is not considered a policy change that would require 2 weeks advance posting.

Vendor under boycott and reason	Start of boycott	End of boycott
Uber: advance labor movement goals, anti-worker policies	Travel Expense policy 03/08/2016	Boycott still in effect
Lyft: advance labor movement goals, anti-worker policies	Travel Expense policy 03/08/2016	Boycott still in effect

Adopted: June 13, 2023

510 Property

Policy

1. Property for purposes of this policy is defined as: tangible and intangible personal property valued above \$500, computer hardware and devices valued above \$100, all software licenses and subscriptions regardless of cost, but excluding consumable office supplies, excluding real estate, excluding building fixtures, and excluding building equipment.
2. The Treasurer will put a label on valuable property to identify AFSCME 189 as owner, including on all computer hardware and devices valued above \$100
3. Members who check out property and remove it from AFSCME 189 offices or storage space will sign a check-out/check-in log.
4. Members must return AFSCME 189 property when their membership ends or when they are going on long-term vacation or leave.
5. The Treasurer will lead an annual inventory of AFSCME 189 property, including items held in storage and at members' locations. Following the inventory:
 - a) Property that is inoperable, obsolete, or surplus property will be sold, donated, recycled, or discarded
 - b) Unused subscriptions, including software, will be cancelled
 - c) A renewed effort will be made to distribute current stocks of promotional items to members
6. In July 2024 and every July after that, the dollar amounts in this policy are authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by AFSCME 189 labor agreement.

Year	Inflation factor	Amounts
July 2023 - June 2024	n/a	\$100/\$500
July 2024 – June 2025	TBD	TBD
...

Acknowledgements: This policy was modeled, in part, after an example by AFSCME 328

Adopted: June 13, 2023

550 [Reserved:] Funds with Restricted Uses

Will be drafted in summer/fall 2023

551 [Reserved:] Operational and Strategic Reserve

Will be drafted in summer/fall 2023

552 [Reserved:] Negotiation Defense Fund (Constitution)

Will be drafted in summer/fall 2023

553 [Reserved:] Negotiation Defense Fund (Non-Constitution)

Will be drafted in summer/fall 2023

Payments and Reimbursements to Members

601 Alcohol

Reference

Policy 103 Code of Conduct

Policy

1. To maintain good stewardship of AFSCME 189 funds, AFSCME 189 funds should be used for alcohol purchases or reimbursements only in limited circumstances. The Executive Board or Membership must approve alcohol expenditures. When alcohol is for an Executive Board event, the Membership must approve the expenditure. The President and Vice President may make reasonable alcohol expenditures averaging no more than \$100 per month to build relationships benefitting the labor movement or AFSCME 189.

Adopted: June 13, 2023, replaces the prior Alcohol Reimbursements policy from Mar 8, 2016

605 Education

References

- Policy 401 Union Leave and Lost Time
- Policy 640 Travel Expenses

Policy

1. AFSCME 189 will pay, within budget constraints, for members to attend classes offered by the Labor Education and Resource Center (LERC) of the University of Oregon in the Portland metropolitan area or virtually. This includes tuition/class registration and Union Leave Union Paid loss time. No Membership approval is needed.
2. AFSCME 189 may pay, within budget constraints, for members to attend education offered by Public Employee Relations Conference, Summer School, Women’s Institute, Labor Notes, and similar ones after Membership or Executive Board approval.
3. AFSCME 189 will pay Union Leave Union Paid loss time for members to attend classes offered by the Labor Education and Resource Center (LERC) of the University of Oregon outside the Portland metropolitan area; no Membership approval is needed.
4. The Treasurer is responsible for providing a copy of this policy to members going to education events and the member should sign an acknowledgment.
5. Attendance policy
 - a) If a member can no longer attend an event, they should notify AFSCME 189 as soon as possible so an alternate member can participate in the event and to limit unrecoverable expenses and cancellation fees. If expenses cannot be recovered, the member will be responsible to repay AFSCME 189.
 - b) AFSCME 189 will not reimburse the employer for Union Leave Union Paid if the member did not attend the event. The member is responsible for arranging alternative leave with the employer.
 - c) If the member does not repay AFSCME 189, they will be ineligible for AFSCME 189-paid Union Leave Union Paid, events, and travel for one year.
 - d) Appeal Process: Should the member have legitimate extenuating circumstances, they may appeal to the Executive Board in writing with seven days of the close of the event. If there is no appeal within this time, the Local will consider the issue closed.

Member Acknowledgement

Member Name	_____
Member’s Phone or Email	_____
Event Name	_____
Event Date	_____
Event Location	_____
Acknowledgement	I have read and understand the AFSCME 189 policies for travel expenses and attendance, education, and Union Leave.
Date and Signature	_____

Adopted: June 13, 2023, partially replaces the prior Budget policy from Dec 4, 2008, and Union-Paid Functions policy from Sept 6, 2011

610 Financial Hardship Assistance to Members

Policy

1. AFSCME 189 aspires to provide financial assistance to members who experience a financial hardship event. AFSCME 189 understands that its financial assistance cannot fully cover all financial hardship needs that a member may face.
2. Member eligibility: All members are eligible. Members whose membership has lapsed due to separation from employment, or stopping payment of Union dues in connection with medical leave are also eligible for 6 months from the lapse date. Bargaining unit employees who have dropped their AFSCME 189 membership are not eligible.
3. Amount: Financial assistance is generally limited to \$300 and another \$300 at least one month later per event, and \$600 per calendar year. Financial assistance is provided as a check payment without conditions or restrictions on the recipient.
4. In July 2024 and every July after that, the amount in this policy is authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by AFSCME 189 labor agreement.

Year	Inflation factor	Amounts
July 2023 – June 2024	n/a	\$300/\$600
July 2024 – June 2025	TBD	TBD
...

5. Event eligibility: Financial hardship is defined as:
 - a) A member facing unanticipated and unusual expenses related to stable housing, food, or healthcare, for themselves or for their immediate family/household member.
 - b) Eligibility for catastrophic leave determined by the City of Portland
 - c) The death of a member or their immediate family/household member
 - d) Substantial loss of income by the member or their family/household member, such as from taking unpaid leave after exhausting paid leave or job loss.

Financial assistance will not be provided or should be paid back to AFSCME 189 when the recipient’s expense will be fully paid by another source such as insurance.

6. Ineligible events:
 - a) Lost income as a result of discipline
 - b) On-going inability to pay expenses with regular income or falling behind on expenses and bills, without a specific event or change
 - c) Wage garnishment, including for child support
 - d) Long-term unpaid child support with no remedy
 - e) Certain legal matters
7. AFSCME 189 no longer pays premiums to continue health coverage under COBRA for members who are unable to work due to a non-compensable illness or injury.
8. Referral to other assistance: AFSCME 189 may also refer the member to other service providers, such as the Labor’s Community Service Agency.

Procedure

1. Stewards should keep in touch with their members to learn of members experiencing financial hardship and recommend the Executive Board approve financial assistance. A member can make a request to an Executive Board member for financial assistance. An Executive Board member should vet the request against this policy for eligibility, including gaining an understanding of the “event.” The steward should confirm the correct name of the recipient and

current mailing address and provide these to the Treasurer. The Treasurer should verify membership status.

2. The Membership or Executive Board must approve financial assistance.
3. The Treasurer will process the financial assistance payment. It is generally treated as gift for federal tax purposes: the donor (AFSCME 189) is not subject to gift tax if the gift is less than \$16,000 per year, and the recipient is not subject to income tax on the gift.⁴
4. To protect privacy, the recipient's medical and family information should not be discussed in a Membership meeting or in public without the member's consent.

Adopted: June 13, 2023, partially replaces the prior Budget policy from Dec 4, 2008

⁴ Advice from AFSCME 75 email to Rob Martineau/Minh Dan Vuong, May 22, 2023. Prior practice was to treat the financial assistance as non-employee compensation, which, if above \$600 per year, would have required AFSCME 189 to issue a 1099 tax form.

615 Meeting Meals

Reference

For meals related to travel, see the Policy 640 Travel Expenses.

Policy

1. AFSCME 189 may provide meals or refreshments at General and Special Membership, worksite, new member orientation, and outreach meetings.
2. AFSCME 189 may provide meals at committee meetings if they occur during meal times.
3. Expenses are authorized up to the applicable rate for meals published by the General Services Administration, subject to budget availability. Gratuity up to 20 percent of the meal cost is authorized if the overall expense stays within the GSA meal rate.

Procedure

1. Executive Board members and the Council Representative are authorized to purchase meals or refreshments for eligible meetings based on expected or actual number of attendees, including reasonable gratuity, and get reimbursement from the Treasurer.
2. Meal rates are published at <https://www.gsa.gov/travel/plan-book/per-diem-rates>.

Time period	Amounts for Portland, Oregon
Federal fiscal year 2023 (ending September 30, 2023)	\$17 for breakfast, \$18 for lunch, \$34 for dinner
Federal fiscal year 2024 (ending September 30, 2024)	TBD
...	...

Adopted: June 13, 2023, revises the prior Meal Reimbursements policy from Aug 13, 2019

620 Member Benefits

Policy

1. AFSCME 189 will pay, within budget constraints, to subscribe to the Northwest Labor Press newspaper to be sent to members.
2. AFSCME 189 will pay, within budget constraints, for members to go to the annual picnic of the Northwest Oregon Labor Council.
3. AFSCME 189 will provide a member appreciation award to members who reach 5 years, 10 years, 15 years, 20 years, 25 years, 30 years, 35 years, and 40 years of AFSCME membership. The length of membership for purposes of this award includes membership in AFSCME 189 and in other AFSCME affiliates, includes AFSCME 189 membership lapses due to layoff or medical leave, but excludes other lapses of AFSCME 189 dues payment or leaving the AFSCME 189 bargaining unit for another job.
4. The Treasurer is authorized to make these payments.

Adopted: June 13, 2023

625 Operational Supplies and Expenses

Policy

1. AFSCME 189 will reimburse Executive Board members for office supplies up to \$200 per purchase, subject to budget availability
2. The Treasurer is authorized to pay expenses for office operations, including: utilities, minor maintenance, office supplies, cleaning supplies, and copying and printing,

Procedure

1. Executive Board members can spend up to \$200 for office supplies directly related to AFSCME 189 business and get reimbursed through the Treasurer. Receipts and expense reports must be submitted to the Treasurer. Any expenditures over \$200 or by a member who is not an Executive Board member requires approval by the Executive Board or Membership.
2. Other local officers can request supplies from an Executive Board member or through the normal motion process at any Executive Board or Membership meeting.
3. Committee Chairs will bring spending proposals for relevant line items to either an Executive Board or Membership meeting for approval. Motions from Committee Chairs have an automatic second, even if they are the only serving member of that committee.
4. In July 2024 and every July after that, the amount in this policy is authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by AFSCME 189 labor agreement, and to be rounded to the nearest \$10 increment.

Year	Inflation factor	Amounts	Rounded Amount
July 2023 – June 2024	n/a	\$200	\$200
July 2024 – June 2025	TBD	TBD	TBD
...

Adopted: June 13, 2023, replaces the prior Budget policy from Dec 4, 2008 and the Purchase Limits on Operational Supplies and Expenses policy from March 8, 2016

630 Stipends for Executive Board Members and Stewards

Reference

AFSCME Financial Standards Code, Appendix B
 AFSCME Financial Standards Code, Appendix F, Section on Officer Allowances/Stipends

Policy

To recognize the substantial amount of time Executive Board members and Stewards dedicate to AFSCME 189 business outside of Union Leave City Paid and Union Leave Union Paid, AFSCME 189 will provide **monthly** stipends as follows:

- a) President: \$600
- b) Vice President: \$600
- c) Treasurer, Recording Secretary, Chief Steward, Communications Editor, Organizer: \$600
- d) Chapter Chairs: \$300
- e) Trustees: none due to financial control element of trustee position. Union Leave Union Paid is authorized for time spent on audit
- f) Stewards: \$100. Stewards must turn in a monthly report of their activities to the Executive Board or its designee to be eligible for this stipend.
- g) Member Action Team Leaders: \$50. Member Action Team Leaders must turn in a monthly report of their activities to the Executive Board or its designee to be eligible for this stipend.

Procedure

1. The annual budget should include a line item (currently 501) and an amount for stipends.
2. The Treasurer will process stipends monthly for service in the prior month; the stipend is treated as wages and subject to income and payroll taxes. The Treasurer will set an hourly wage rate above minimum wage.
3. Recipients may waive their stipend on a month-to-month basis should circumstances prevent them from fulfilling the duties of their office. Recipients may also opt to waive their stipend on an ongoing basis.
4. Any member who does not meet minimum attendance will have their stipend canceled or reduced in accordance with Policy 310 Officer Attendance.
5. Any member who owes a balance to AFSCME 189 will have their stipend withheld and applied to the balance owed.
6. An individual can only receive stipends for one role or office at a time; for example, receiving a stipend for being a Steward and Chapter Chair at the same time is not allowed.
7. Beginning July 2024, the stipend amount is authorized to increase with the cost-of-living adjustment provided by the labor agreement between AFSCME 189 and the City of Portland.

Year	Inflation factor	Stipend Amounts
July 2023 - June 2024	n/a	\$50/\$100/\$300/\$600
July 2024 – June 2025	TBD	TBD
...

Adopted: June 13, 2023, replaces the prior Stipends policy from Sept 6, 2011

635 Stipends for Technology Use

Reference

AFSCME Financial Standards Code, Appendix F, Section on Officer Allowances/Stipends

Policy

1. AFSCME 189 expects its Executive Board members to be responsive to telephone and electronic communications, perform general computer work, and conduct Union business on their personal devices, phone plan, and internet plan. To facilitate this, AFSCME 189 will provide **annual stipends**:
 - a) President: \$600
 - b) Vice President: \$600
 - c) Treasurer, Recording Secretary, Chief Steward, Communications Editor, Organizer: \$600
 - d) Chapter Chairs: \$300
 - e) Trustees: none
 - f) Stewards: none
2. AFSCME 189 will no longer purchase cell phones, tablets, or computers for Executive Board members, except one AFSCME 189-owned laptop may be used by the Treasurer.

Procedure

1. The Treasurer will process the stipend at the beginning of a term and anniversary, which is usually March; the stipend is treated as wages and subject to income and payroll taxes.
2. Any member who owes a balance to AFSCME 189 will have their stipend withheld and applied to the balance owed.
3. If the recipient of the stipend leaves office within the first 6 months of taking the office, half of the technology stipend must be paid back to AFSCME 189. If a recipient takes office outside the March to March cycle, the first technology stipend will be prorated and the next technology stipend will be paid the following March.
4. In July 2024 and every July after that, the stipend amounts are authorized to increase with a generally recognized inflation index or the cost-of-living adjustment provided by AFSCME 189 labor agreement.

Year	Inflation factor	Amounts
July 2023 – June 2024	n/a	\$300/\$600
July 2024 – June 2025	TBD	TBD
...

Adopted: June 13, 2023, replaces the prior Cell Phones policy from Sept 6, 2011, the prior Computer Policy from unknown date, and the prior Stipends policy from Sept 6, 2011

640 Travel Expenses

References

Also see Policy 605 Education and Policy 401 Union Leave and Lost Time
AFSCME Financial Standards Code, Appendix F, Section on Per Diem Payments and Mileage

Policy

1. AFSCME 189 will pay for members' actual travel expenses for authorized events within the limits of this policy.
2. The event or meeting must be either pre-authorized by a specific policy or by a vote of the Membership or Executive Board.
3. Ground Transportation
 - a. Commuting, that is travel between home and the primary worksite, is not eligible for reimbursement for tax-compliance reasons.
 - b. Events are only eligible if 50 miles or farther away from the AFSCME 189 Union Hall in Portland, Oregon. Salem, Oregon is considered 50 miles away from AFSCME 189 in Portland, Oregon. Eligible ground transportation expenses include: parking at an event, parking at the airport, mileage for personal vehicle, highway tolls, taxi or rideshare vehicle or airport shuttle, and public transportation. Rental cars require pre-approval by the Treasurer.
 - c. Parking at the airport will not be reimbursed when it costs more than two round trips from the member's home to the airport; this means a member may want to get dropped off and picked up at the airport when parking would be more expensive.
 - d. Executive Board members can get parking reimbursed for meetings they are required to attend, even if closer than 50 miles from the AFSCME 189 Union Hall, except for Executive Board and General Membership and Special Membership meetings.
 - e. Mileage will be computed from the member's residence or place of work to the event as applicable. Carpooling with other members going to the same event is encouraged. Mileage will be reimbursed at the prevailing IRS "business" rate. Documentation should include a printout of an online map showing starting and ending location, distance, and Union business purpose.
 - f. Special agreements for mileage reimbursements that differ from this policy may be made for collective bargaining meetings.
4. Air Transportation
 - a. Eligible air transportation expenses include: economy/coach class using a reasonable cost, reasonable route and fees for 1 checked bag. Companion travel, upgrades to a higher class, additional checked bags, incremental costs for extended stays, or layovers in another city for an extended stay are at the member's expense.
 - b. When group airfares are arranged, reimbursement to individuals not participating in group travel is limited to the group airfare price.
5. Meals
 - a. Expenses for an individual member's meals are an eligible expense only for overnight travel and outside of Portland. In-town per-diem is not eligible for tax compliance reasons. Generally, reimbursement is calculated using the destination city's per-diem rate published by the General Services Administration:
<https://www.gsa.gov/travel/plan-book/per-diem-rates>.

- b. Per-diem should be reduced for those meals that the event provides. If a member has special dietary needs that are not met, reduction for meals provided is not necessary; an explanation should be included in the expense report. At the Treasurer's discretion, actual meal costs can be reimbursed with receipt, instead of providing per-diem.
- 6. Lodging
 - When AFSCME 75 has made hotel arrangements, AFSCME 189 will generally follow those arrangements and not pay or reimburse more than the AFSCME 75 hotel arrangement. When AFSCME 75 has not made hotel arrangements, AFSCME 189 may set a maximum amount for lodging costs and will generally follow the General Services Administration rates.
- 7. No double payment
 - AFSCME 189 will not pay or reimburse when another source, such as another member, the employer, another union, or the event host organization, pays for a travel expense. Members will not seek reimbursement in these cases, or should pay back AFSCME 189 in these cases.
- 8. Attendance policy
 - a. If a member can no longer attend an event, they should notify AFSCME 189 as soon as possible so an alternate member can participate in the event and to limit unrecoverable expenses and cancellation fees. If expenses cannot be recovered, the member will be responsible to repay AFSCME 189.
 - b. AFSCME 189 will not reimburse the employer for Union Leave Union Paid if the member did not attend the event. The member is responsible for arranging alternative leave with the employer.
 - c. If the member does not repay the Local, they will be ineligible for AFSCME 189-paid Union Leave Union Paid, events, and travel for one year.
 - d. Appeal Process: Should the member have legitimate extenuating circumstances, they may appeal to the Executive Board in writing with seven (7) days of the close of the event. If there is no appeal within this time, the Local will consider the issue closed.
- 9. Advance payment before travel
 - a. Upon member request, AFSCME 189 will generally provide an advance payment to a member for overnight travel outside of Portland to cover mileage and per-diem. The advance should be reconciled with the expense report after travel is completed. Also refer to AFSCME Financial Standards Code, Appendix F, Section on Expense Advances.

Procedure

1. The Treasurer is responsible for providing a copy of this policy to members before they book any hotels or air travel and the member should sign an acknowledgment.
2. The Treasurer is responsible for providing expense report templates.
3. Members with questions should ask the Treasurer or President for clarification or pre-approval before purchasing or booking travel, to avoid confusion or unreimbursed expenses.
4. Within 30 days of completing travel, the member should submit a complete, signed expense report and itemized receipts to the Treasurer.
5. The Treasurer will process payment; it is generally not considered wages and not subject to income or payroll tax.

Member Acknowledgement

Member Name	_____
Member's Phone or Email	_____
Event Name	_____
Event Date	_____
Event Location	_____
Acknowledgement	I have read and understand the AFSCME 189 policies for travel expenses and attendance, education, and Union Leave.
Date and Signature	_____

Adopted: June 13, 2023, replaces the prior Mileage policy from Sept 6, 2011, and "Other Budget Related Policies" from Dec 4, 2008, and Reimbursements policy from Sept 6, 2011, and Travel Expenses policy from March 8, 2016, and Union-Paid Functions policy from Sept 6, 2011

645 Leased and Owned Automobiles

Reference

AFSCME Financial Standards Code, Appendix F

Policy

1. AFSCME 189 does not currently lease or own automobiles.
2. Before leasing or owning automobiles, AFSCME 189 will create a policy covering usage, liability insurance, and tax implications.

Adopted: June 13, 2023

650 Cash Incentives to Members

Policy

1. AFSCME 189 no longer pays cash incentives to members to incentivize attendance at meetings (also known as “door prizes” or “drawings”). If AFSCME 189 wants to change this practice, this policy must be changed.

Adopted: June 13, 2023, partially replaces the prior Budget policy from Dec 4, 2008

Political Action and Community Relations

701 Political Endorsements

Policy

1. AFSCME 189 may endorse or oppose candidates for City of Portland and Port of Portland elections.
2. AFSCME 189 may endorse or oppose ballot measures for the City of Portland and Port of Portland.
3. Outside City of Portland and Port of Portland elections, AFSCME 189 can join an endorsement made by another AFSCME Local or AFSCME Council. AFSCME 189 will not contradict an endorsement by another AFSCME Local or AFSCME Council that has jurisdiction. AFSCME 189 can consider joining endorsements made by non-AFSCME unions.
4. Endorsements or opposition require a two-thirds majority at a General Membership meeting.

Procedure

1. The Political Action Committee will invite candidates and ballot measure campaigns to interviews and then make a written recommendation to the Membership on whether to (1) endorse, (2) oppose, or (3) take no position on a candidate or ballot measure. The Political Action Committee may establish criteria for its recommendations, such as a candidate's past record of supporting labor positions and their questionnaire/interview answers.
2. The Political Action Committee will strive to provide recommendations in time such that the Membership can vote on endorsements before voter pamphlet submissions are due and before regional union bodies finish their endorsements.
3. No interview is necessary for ballot measures that renew an existing service, tax, or bond.
4. Endorsements of multiple candidates vying for the same office are possible.
5. Debate Rules for Membership meetings are:
 - a) As a point of privilege, all members who participated in candidate interviews will be given one minute per race at the time of motion, if they wish. Members will disclose if they were not in attendance for all candidates interviewed in a race.
 - b) If a member wishes to speak on a motion or question, they should indicate by a raised hand to be put on the list of speakers.
 - c) The maker of a motion shall be granted three minutes to open debate.
 - d) The Chair will designate a time keeper, and maintain the record of the lists indicating speakers.
 - e) No member may speak more than once on the motion or question until all those wishing to speak have had an opportunity (limited to three minutes), a second list will be kept for those wishing to speak again (limited to one minute). To maintain a courteous debate, all remarks and questions should be directed to the Chair; no remarks or questions shall be directed to another member during debate.
 - f) The question shall not be subject to debate until it has been stated by the Chair. Once there is a motion, no more than two speakers on one side of a question may be granted the floor until a speaker on the other side of the question has spoken. If there is no speaker on the other side of the question, debate will be considered closed unless the

membership votes to extend debate. If there is a speaker on the other side of the question, debate will continue, alternating speakers on both sides of the question until the question is called or until there is no one left to speak on one side of the question or the other.

- g) A 2/3 majority vote from at the Membership meeting is required to endorse or oppose a candidate or ballot measure.

Adopted: June 13, 2023, replaces the prior Candidate Endorsements policy from March 8, 2016

702 Political Contributions

Policy

1. Only after AFSCME 189 has endorsed a candidate or ballot measure, can AFSCME 189 choose to make a political contribution to their campaign. AFSCME 189 will not make political contributions when it has not endorsed.
2. Political contributions will adhere to federal, state, and local campaign finance laws and to the laws relating to AFSCME 189's tax-exempt status. Note that Portland City Code 2.10.010 prohibits political contributions by unions to City of Portland candidates.
3. A recommendation for the amount of a political contribution should consider: contribution limits in campaign finance law and AFSCME 189's tax-exempt status, the anticipated spending level of the campaign, campaign contributions of unions similar to AFSCME 189, how close the race is, history of past AFSCME 189 contributions to the same or similar campaigns, and the current AFSCME 189 budget.
4. Political contributions should only be made to organized committees, not to any individual or intermediary fundraiser. To avoid processing fees, contributions should generally be made by check, and not through an internet fundraising website or credit card processing service.
5. The annual budget should identify a line item and amount for political contributions.

Adopted: June 13, 2023

703 [Reserved:] Lobbying

Will be drafted summer/fall 2023

710 Grants to Community Organizations

References

1. This policy is distinct from Policy 702 Political Contributions and Policy 610 Financial Assistance to Members – consult those policies as applicable.
2. Also refer to Policy 311 Conflict of Interest

Policy

1. AFSCME 189 aspires to be a good community member and may occasionally make a grant, charitable contribution, donation, or sponsorship to a community-based organization (collectively referred to as “grants” in this policy), within the priorities and limits of this policy. AFSCME 189 understands that its grants cannot fully cover all needs that recipients may have.
2. If the recipient publicizes funds they receive from other organizations, they should recognize AFSCME 189 at least as prominently as other funders of the same funding level in promotional materials.
3. Grants should be understood to be one-time only and not a promise or entitlement for future grants.

Procedure

1. The annual budget should identify a line item and amount for grants.
2. A member can make a request to an Executive Board member for a grant to another organization. The Executive Board will also regularly initiate consideration of grants to community organizations. An Executive Board member should vet the recipient against this policy for eligibility, including gaining an understanding of the recipient and its services and clients. The Executive Board member should confirm the correct name of the recipient, their tax reporting number, and current mailing address and provide these to the Treasurer.
3. Grant recipients do not need to be a 501(c)(3) non-profit organization. Examples of grant recipients include: other unions during a strike or organizing drive, food banks, Labor’s Community Service Agency in Portland, Sunshine Division, toy drives, youth sports teams, summer camps/after school activities, civic events.
4. Grants should generally not be made to recipients or events that may be in conflict with collective bargaining; for example, a City of Portland bureau or event.
5. A recommendation for the grant amount should consider: connection to AFSCME 189 members, the anticipated costs of the recipient, contributions of unions similar to AFSCME 189 to the same recipient, history of past AFSCME 189 grants to the same or similar recipients, and the current AFSCME 189 budget.
6. For complex grants, AFSCME 189 should enter into a written contract (grant agreement) with the recipient.
7. The member or Executive Board member should prepare a written recommendation to the Membership or Executive Board, including:
 - a) The recommended action (Example: The membership is requested to approve a grant of \$X to “XYZ organization”). The recommendation should clearly state whether the grant is for a specific/restricted purpose, such as a specific event, food, equipment, etc., or

whether it is an unrestricted grant. Financial requests must include a specific or an “up to” dollar amount and a source line item in the current budget.

- b) Background information (recipient names, contact information, event dates, description of event or services or clients, similar actions from the past, links to recipient’s webpages, applicable policies)
 - c) If applicable: a solicitation request from the grantee, a draft contract, or an explanation of what the recipient will provide to AFSCME 189 (for example, AFSCME 189 logo will be shown on a banner at the sports field)
 - d) Arguments for the recommendation, and for controversial items also arguments against the recommendation
8. The Membership or Executive Board must approve the grant.
 9. Factors the Membership or Executive Board may consider in approving the grant include:
 - a) Recipient’s connection to AFSCME 189 members. For example, a Portland-based recipient has a stronger connection to AFSCME 189 members than a national organization; a Portland schools-related cause has a stronger connection to AFSCME 189 members than a Portland underwater basket-weaving hobby related cause.
 - b) Severity of the needs of the recipient’s clients. For example, houselessness, poverty, healthcare, and disaster relief have higher severity than athletics or entertainment.
 - c) Recipient’s connection AFSCME 189 political advocacy priorities. For example, workplace safety or family leave may have a stronger connection than a national political issue.
 10. The member and Executive Board member should build a relationship with the recipient and explain AFSCME 189’s expectations.
 11. Grants should only be made to an organization, not to any individual or intermediary. To avoid processing fees, the Treasurer should generally pay by check, and not through an internet fundraising website or credit card processing service.

Adopted: June 13, 2023, partially replaces the prior Budget policy from Dec 4, 2008

720 Public Communications and Correspondence

Policy

1. Only the President, Vice President, or their designated spokespersons are authorized to speak “on the record” to journalists on behalf of AFSCME 189, or issue media releases. The AFSCME 75 Communications Director can be consulted as needed. Members receiving inquiries from journalists are encouraged to refer them to the President, Vice President, or their designee.
2. When members speak to journalists, they should make clear they are speaking as an individual or member, and not on behalf of AFSCME 189.
3. Only Executive Board members and the Council Representative may use AFSCME 189 letterhead. They should make clear in the contents of the letter or with their signature, if they are representing their individual position or an AFSCME 189 position. When they are representing an AFSCME 189 position, they should ensure they are accurately representing decisions made by the Membership, Executive Board, or vote results.
4. The AFSCME 189 logo, including the mark of three arches with star, can only be used by AFSCME 189 to convey an official AFSCME 189 communication, or advertise an event or promotional items. Outside entities may only use the AFSCME 189 logo when authorized by AFSCME 189.
5. When members sign a petition or a supporter list for a political campaign, they may list their affiliation with AFSCME 189 “for identification purposes only,” but they will not sign the petition or supporter list on behalf of AFSCME 189.
6. The President, Vice President, Treasurer, Recording Secretary, Chief Steward, Organizer, and Communications Editor are authorized to write non-controversial statements of thanks, appreciation, recognition, support, and solidarity on behalf of AFSCME 189 on the website and social media and in correspondence with other organizations or people.

Adopted: June 13, 2023

Employment

801 Hiring of Employees

Reference

AFSCME Financial Standards Code, Appendix F

Policy

1. AFSCME 189 does not currently have employees, except certain payments to officers and members may be considered wages. The Council Representative is an employee of AFSCME Council 75.
2. Before hiring any employees, AFSCME 189 will create a policy covering hiring, wage rates, benefits, paid absences, severance payments, and other requirements.

Adopted: June 13, 2023

Administration and Records

90I Maintenance and Revisions of Policy Manual

Reference

AFSCME Financial Standards Code, Appendix F

Policy

1. The goals of the AFSCME 189 Policies are to: (1) guide conduct and decision-making and clarify constraints and trade-offs, (2) provide consistency for complex or recurring actions, (3) provide controls to safeguard assets and achieve organizational goals, (4) provide documentation and transparency to members
2. The order of precedence in interpreting applicable rules is generally: Laws and court rulings, AFSCME International Constitution, AFSCME 189 Constitution, AFSCME International guidance documents, AFSCME 75 guidance documents, AFSCME 189 policy
3. Substantive additions, changes, or deletions to policies require a vote at a General Membership meeting with 2 weeks advance posting of the proposed changes. The method of advance posting will be the same as for General Membership agenda items described in the Agenda policy.
4. Policies should be consistent with legal requirements and the AFSCME Financial Standards Code
5. One-time exceptions to a policy require a 2/3 vote at a General Membership or Executive Board meeting
6. Deletion of an entire policy requires a 2/3 vote at a General Membership meeting
7. A policy committee may be established to study and recommend changes to policies
8. Some policies may be designated confidential to protect the information security or bargaining/contract defense strategy.

Procedure

1. The Recording Secretary will ensure that proposed policies are clearly marked as draft/proposal, that adopted policies are included in meeting minutes, and that compiled Policies document is continuously revised to reflect policy changes. The Recording Secretary is responsible for making Policies accessible to the Executive Board, and to members upon their request, and for archiving policies that have been superseded.
2. New or revised policies should include:
 - a. A policy statement (a high-level purpose or goal, a general permission, a general prohibition, a dollar amount or range)
 - b. References to other applicable laws or guiding documents
 - c. Procedural steps and who is responsible for taking action at each step to achieve the goal
 - d. Appropriate controls, such as approvals, reviews, separation of duties, dollar limits, and written documentation requirements
 - e. A policy may include an expiration date or a target date for future review
 - f. The actual date of adoption and revision
3. The Treasurer and Recording Secretary may make administrative, non-substantial changes to policies, such as correcting spelling errors, renumbering policies and sections, updating

references to laws or other guiding documents, updating web links, and adjusting dollar amounts for inflation when authorized.

Adopted: June 13, 2023, replaces the prior “Policy Procedures (Policy Exceptions)” policy from Sept 6, 2011 and “Ratification of Policies” policy from Sept 9, 2021

902 [Reserved:] Records Retention

Will be drafted summer/fall 2023