

# AFGE Local 3509 Policy Document

Adopted 7/23/2019

**NOTE: ALL TRAVEL IS SUBJECT TO BUDGET RESTRICTIONS**

## **Section I: Reimbursement of Travel Expenses**

A. Travel for official business must be approved in advance. With the exception of travel authorized by other policies, the President must authorize all travel. In the President's absence, the Executive Vice President shall authorize travel. The local's voucher will include a line for authorization of travel. (EBoard vote 09/25/1993, amended 09/16/2001 & 03/31/2006)

B. Chief Stewards have authority to travel in their area without prior approval. (EBoard vote 02/22/1995)

C. All Local 3509 representatives who travel on Local business should use the mode of transportation, which produces the lowest overall cost to the Local, while allowing the travel to be performed effectively and efficiently. In keeping with the National Agreement between SSA and AFGE, AFGE Local 3509 representatives will not be required to use privately owned vehicles when traveling on Local business. If a representative chooses to use a rental vehicle, the most economical size, make, and model should be selected. Cost of the rental vehicle plus gasoline will be reimbursed, but not mileage. (EBoard vote, 03/07/2003)

D. Normally, representatives who choose to fly on Local business within the Local's boundaries will be required to do a cost comparison and will be reimbursed either the actual cost of travel or the amount they would have been due had they driven, whichever is less. When there is sufficient justification, the Local President may authorize the reimbursement of airfare within the geographic boundaries of the Local. Whenever possible, this authorization should be obtained in advance. (EBoard vote, 03/07/2003)

E. Flying to locations outside the geographic bounds of the Local is deemed to be cost effective. A cost comparison will be required if a local rep chooses to travel outside the geographic bounds of the Local by other means. (EBoard vote, 03/07/2003)

F. The Local's EEO Specialist and Arbitration Representative may travel within the local without prior authorization in order to fulfill their representational duties. (EBoard vote, 09/16/2001, amended 03/31/2006)

G. Travel vouchers must be filed within three months of incurring the expense. Vouchers filed after three months will be denied. (EBoard vote, 02/22/1995)

H. Any travel expenses incurred, which were no pre-authorized, will not be reimbursed. (EBoard vote, 09/24/1993)

I. Mileage and other travel expenses are reimbursed at current government rates. The local uses government regulations in determining per-diem and mileage reimbursement rates. Local

transportation costs will be reimbursed in unusual circumstances. The Treasurer and President will be responsible for these determinations. (EBoard vote, 02/22/1995)

J. Any member attending a general membership meeting will be reimbursed for mileage only. Car-pooling is encouraged. (Membership vote, 09/24/1994)

K. Each representative traveling on Local business is entitled to a private room. (EBoard vote, 11/25/2002)

L. Parking expenses are authorized regardless of distance traveled. (EBoard vote, 09/23/1994)

M. If an individual on approved travel flies and can save money by staying over Saturday, the Local will pay for Saturday lodging and per-diem following government regulations. (EBoard vote, 09/24/1994)

N. If a delegate misses a vote at a credentialed meeting, they will not receive payment for per-diem for that day, unless the Delegates in attendance have approved their absence. (EBoard vote, 09/25/1993, amended 12/21/2017)

O. Requests for advances for authorized expenses are to be made in the same calendar year the individual expects to incur the expense. It is the Treasurer's and President's sole discretion to approve requests for advances. For all expenses other than travel, advances are to be cleared within 30 days of the request. Travel advances must be cleared within 30 days after receipt of the advance or 10 after return homes, whichever is later. The Treasurer will make a written request for documentation with a deadline of 10 days for any advance not cleared timely. If documentation is not furnished within ten days of the written request, the matter will be referred to the President for action. No further payment will be made to the individual until the advance is cleared. Advances may be cleared from the first voucher received from the individual. (EBoard vote, 09/16/2001)

## **Section II: Appeals**

A. Individuals may file an appeal if they disagree with the Treasurer's decision concerning a voucher. The first level of the appeal will be to the Executive Board; the second and final appeal is to the membership. Appeals must be filed within 60 days of the decision. Appeals are to be submitted to the Secretary of the Local, who shall be responsible for distribution to the Executive Board for a decision. Appeals to the membership may be made at the next regularly scheduled meeting of the Local. The Secretary will be responsible for presenting written appeals to the membership for a vote. (EBoard vote, 09/30/1993, amended 09/16/2001)

## **Section III: Rebates**

A. Members with a salary the equivalent of pay grade GS 5, Step 10 or less will receive a dues rebate of \$50.00 per year. They must be a member for one year and will be paid one month after their anniversary date, upon request. Forms are available from the Treasurer. The deadline for requesting the rebate is 12 months after the individual's anniversary date. (Membership vote, 02/22/1992)

## **Section IV: Credit Cards**

A. The Local may obtain a credit card for the purpose of paying hotel bills, airline tickets, and other specific items as authorized by the Executive Board. The President will have authority to approve charges and the Treasurer will have authority to cut off charging privileges and to cancel the account at any time for any reason. (EBoard vote, 09/23/2005)

**Section V: Wage Compensation for Union Officials employed by SSA**

A. Subject to authorization by the President, Union officials who use Annual Leave, LWOP, or Credit Hours to perform authorized activity on behalf of Local 3509 may be compensated at their current government rate of pay. If use of LWOP for Union work on behalf of Local 3509 causes a forfeiture or loss of leave accrual, the loss of Annual Leave may be compensated, if authorized. Subject to authorization by the President, Union officials employed by SSA on a part time basis who perform authorized Union activity on behalf of Local 3509 may be compensated their current government rate of pay for Union work performed during normal business hours Monday-Friday. Such compensation when combined with hours paid by the government will not exceed 8 hours per day. This policy is effective with 07/23/2019. (EBoard vote, 07/13/2019)

B. Lost time reimbursement for Union officials employed by SSA attending the Council 220 or AFGE National Convention are limited to funded delegates only, with a cap of 8 hours per day, and payable for time spent in meetings Monday-Friday only. If a delegate who is not funded by the Local attends either the Council 220 or AFGE National Convention, the Local is not responsible for payment of lost time. (EBoard vote, 11/20/2009, amended 12/21/2017)

C. All funding for the Council 220 and AFGE National Conventions comes out of the meetings budget, including lost time reimbursement for delegates.

D. If a delegate misses a vote at these meetings, they will not receive a reimbursement for lost time for that day, unless the Delegates in attendance have approved their absence. (amended 12/21/2017)

**Section VI: Compensation for Retired Unions Officials (Adopted 12/21/2017)**

**A. Stipends**

1. In the event that a current elected Officer of AFGE Local 3509 retires from Social Security, the Local will pay a monthly stipend to that Officer at the following rates:

President: \$800.00

Executive Vice President: \$525.00

Treasurer: \$800.00

Secretary: \$525.00

2. Funding, including employer taxes will come from the Service Fees/Incentives Budget.

**B. Wage Compensation**

1. Delegates to the AFGE Council 220 and AFGE National Convention who are retired from Social Security will be compensated for their time as follows:

a. AFGE Local 3509 will pay retired SSA delegates an hourly rate commensurate to retirees who do organizing for AFGE National.

b. There will be no wage compensation for time spent in travel to and from these conventions on Saturday/Sunday or in excess of 8 hours.

c. Wage compensation for retired delegates funded by Local 3509. If a delegate who is not funded by the local attends either the Council 220 or AFGE National Convention, the Local is not responsible for payment of wages.

C. All funding for the Council 220 and AFGE National Conventions comes out of the meetings budget, including wages for retired delegates.

D. If a retired delegate misses a vote at these meetings, they will not receive a wage payment for that day, unless the Delegates in attendance have approved their absence.

#### Section VII: Affiliation with Central Labor Councils

A. The Local will affiliate with AFL-CIO Central Labor bodies where we have members who are willing to go to meetings. (Membership vote, 10/14/1995)

#### Section VIII: Boycotts

A. Local 3509 will not hold any meetings in SC until such time as the Confederate flag issue is resolved. Resolved means to the satisfaction of the NAACP. (Membership vote, 03/18/2000)

Note: Resolved in 2016.

B. The Executive Board meeting at which the audit is done may be held in the city of the Treasurer's duty station, even if this results in a meeting in South Carolina. (Membership vote, 03/13/2004)

#### Section IX: Safeguarding Data

A. Sensitive data carried in electronic format will be safeguarded by encryption. Sensitive data will not be packed in checked baggage and normal care will be taken in all other situations. (No formal vote taken, consensus reached at 09/07/2007 EBoard meeting)

#### Section X: Representation

A. Effective 01/01/2005, Local 3509 will not represent employees in MSPB, EEO, OWCP, OIG, or other proceedings not required by the National Agreement or 5 USC 71, unless their current membership in AFGE predates the event leading to the need for representation. For probationary employees who have not joined AFGE and employees in non-Union offices within the jurisdiction of Local 3509, the Executive Board will decide on a case-by-case basis whether to provide representation. (EBoard vote, 03/30/2005)

#### Section XI: Continuing Financial Obligations

A. Effective with 01/01/2010, Local 3509 will pay an incentive of \$50.00 to new members when they join the Local. This does not apply to members who are transferring from other AFGE Locals. (Membership vote, 11/21/2009)

B. Local 3509 will pay \$2.00 per member per year to AFGE's Legislative Action Fund. (Membership vote, 09/04/2004)

#### Section XII: Grievances

A. The local representative will normally handle the first and second steps of grievances. The local rep will call their Chief Steward prior to filing any grievance and will send a copy of the grievance to the Chief Steward.

B. Chief Stewards are responsible for the third step presentation of all grievances within their area.

C. Upon receipt of a denial on a third step, the Chief Steward should send a copy of the third step decision to the Secretary immediately and ask that the case be scheduled for review during the next conference call of the EBoard. The Chief Steward will present the case to the EBoard, who will vote on whether to arbitrate. If there is a possibility of missing a timeframe, the Chief Steward should invoke arbitration prior to the vote. If the EBoard votes not to arbitrate the case, the Chief Steward should withdraw the grievance invocation immediately and send a copy of the withdrawal to the Secretary.

D. The Chief Stewards are responsible for sending a copy of the 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> step grievance decisions, the invocation of arbitration form, and the arbitration decision/settlement agreement to the Secretary. The Secretary is responsible for maintaining a database of all grievances/arbitrations and for periodically briefing the President.

E. The Executive Board approves expenses for arbitration when it is decided to arbitrate. The Secretary is responsible for notifying the grievant and local rep of the EBoards's vote on whether to arbitrate a case.

F. The Chief Steward is responsible for ensuring cases are arbitrated once a vote is taken by the EBoard.

G. The Advocate is responsible for notifying the grievant of the arbitration decision. If the advocate is from outside the Local, the TA will be responsible.

## **Section XII: ULPs**

A. Chief Stewards are responsible for filing ULPs within their area.

B. All ULPs are to be sent to the President or a Designee of the President for review prior to submission.

## **Section XIII: Bargaining Demands**

A. Prior to filing a demand to bargain, local reps are to call their Chief Steward for assistance.

B. Space actions (relocations/renovations, etc) bargaining is controlled by the Local President. Local reps are not authorized to enter into agreements on space actions. (EBoard vote, 09/17/1999)

## **Section XIV: Official Time**

A. The President is responsible for making allocations of Local Bank time. When a new rep is appointed, they will complete a New Rep Data Sheet and submit it to the Secretary. In order to be placed on the OUTTS Users Database, the President or their designee will inform Council 220's Designee.

B. All reps are responsible for tracking their use of official time, making sure they have sufficient time and for ensuring accuracy of their OUTTS record.

C. Reps who need more official time should send a request to the President including a screen shot of their OUTTS record, the amount of additional time they need and the reason. Note: New allocations can take at least a week to process.

#### **Section XV: Processing of 1187s and Member Information Changes**

A. All 1187s are to be sent to the Treasurer for processing. Currently this is M. Patrice Davis at PO Box 5778, Anderson, SC 29623. Make sure to enter a receipt date (the day you received it) on the 1187 prior to mailing it. DO NOT HOLD THE 1187. SENT IT TO THE TREASURER IMMEDIATELY.

B. If the member has a personal email, enter the PERSONAL EMAIL on line 8 of the 1187.

C. Keep a copy of the 1187 for your records.

D. If a member transfers into an office from another local, the local rep should complete a new 1187, mark it "TRANSFER," and send it to the Treasurer for processing. Follow the same instructions for processing an original 1187.

E. Notify the Treasurer of the following:

1. If a member moves into or out of the office, the local rep should send a change of address, new office, and telephone number
2. Member's change of address
3. Name change
4. Personal email changes
5. Retirements

F. Members can only drop their membership on their anniversary date. Requests for anniversary dates should be addressed to the Treasurer.

G. 1188s (drop out forms) are to be obtained from the office manager. The local doesn't have these forms, nor do we process them. They are given to management to process.

#### **Section XVI: Steward Training**

A. In order to attend face to face training a steward has to attend 75% of the scheduled monthly trainings (virtual training). Exceptions will be determined by the Executive Board. Roll will be taken at the beginning and end of the call. This new policy change will begin with January 2012. (Membership vote, 10/01/2011)

#### **Section XVII: Recognition of Representatives (adopted by the Executive Board 04/26/2016)**

A. 10 Year Recognition: Reps who have served the local for 10 years will be recognized by the local with a pen set.

B. Tokens of Appreciation: Trainers and speakers at local meetings will be given a token of appreciation.

C. Monthly Tokens: The local will award a travel mug to those reps who perform exceptional work on behalf of the local. Reps will also be recognized for their efforts on behalf of the local with certificates and shout outs.

D. Steward of the Year: The Local Executive Board will submit nominations during the month of January for Steward of the Year. The nominations should include why you are nominating the person. The Board will collectively decide on the recipient. The first award will be in the 2017 for calendar year 2016 and will be awarded at the Spring Meeting.

E. 25 Year Representative recognition: Those reps or officers who have served the local for 25 years will be presented with \$5 per year of service along with a certificate of recognition.

### **Section XVIII: Standing Committees and Other Specialists**

A. The local has established the following standing Committees/Specialists. All appointments (including Chairs) are made by the President of the Local with advice of the Executive Board and Chief Stewards.

1. Legislative Action Committee
2. Health and Safety Committee
3. Veterans Committee/Liaison
4. Workers Compensation Committee/Specialists
5. EEO Committee/Specialists