

**AFGE
LOCAL 503****Standard Operation Instruction****24 April 2007****OPERATING INSTRUCTION and COMPLAINT PROCESSING GUIDE**

1. **PURPOSE:** To state policy, assign responsibility and provide standardized procedures for the operation of Local 503 and for the initiation and processing of complaints and concerns for West Campus employees.
2. **POLICY:** It is the policy of Local 503 that all employees are assured prompt, fair and courteous representation when policies, regulations, or the Master Agreement between the American Federation of Government Employees and the Department of Veterans Affairs have been violated. When such violations occur, it is essential that prompt and just corrective action be taken. The procedures outlined below will be followed in conjunction with guidelines of the Master Agreement, American Federation of Government Employees (AFL-CIO) Constitution, and Local by-Laws. To be effective in administering this guidance, representatives must become trained on local and agency-wide policies, regulations, the AFGE/VA Master Agreement, national-level guidance, and maintain their proficiency in assigned duties.
3. **OFFICE ADMINISTRATION:** It is the intent of Local 503 to work in partnership with management to the extent that the partnership remains viable. To include the President, each officer and steward is required to request official time as needed from their supervisor. Official time for the E-Board is in addition to time needed to review and prepare cases and to attend meetings or events on behalf of Local 503. During days of official time, all officers will complete administrative reports, complaint processing, file, and office maintenance as stated herein and as needed. All official time will be logged on the official time log in the Union office. Time should be spent proactively assisting the President and Executive Vice President as required. The following are some additional administrative duties within the office:

A. **Meetings and Other Functions:** Meetings and other events will be shared among the representatives and stewards. **All representatives are encouraged to express their willingness to get involved and the degree of involvement to the E-Board.** When attending meetings or events on behalf of Local 503, the President and/or Executive Committee will be briefed on any issues pertinent to Local 503 and bargaining unit members. Lack of involvement, specifically for stewards, could place their status as representatives and commitment in question.

B. **Bills:** All AFGE bills will be paid at the beginning of the month no later than (NLT) the second Friday.

C. **Audits:** Audits will be conducted at least annually by an outside agency. One additional audit should be conducted by the membership. Once audits are completed the

general membership will be briefed on the results. No audit is complete until approved by the E-Board. All reports, to include LM-3 reports, will be submitted timely.

D. Budget: Each year NLT 30 November, a budget will be prepared for the upcoming year. All budgeted items and amounts must be approved by the general membership by vote. A majority rules for approval/disapproval. If disapproved, any item of contention will be resolved and the budget resubmitted until approved.

E. Credit Card Use: AFGE credit cards will be used for official business only. The name on the card will reflect the President, Executive Vice President and/or Secretary/Treasurer only and be changed as new officers are elected. The card may be used for lodging expenses, authorized travel expenses, and other purchased related to Union activities. Once travel is completed, the Secretary/Treasurer will be furnished with all travel receipts within five duty days. Travelers may request advances for per diem. Failure to return cash advances, credit cards, or other such items if travel is canceled could result in prosecution. Vouchers of purchases made as credit or debit must be signed by two officers. All checks will be signed by two authorized officers. Local 503 will not provide loans to any member under any circumstances.

F. Notification: Notification of general meetings and any other special call meeting will be sent in enough time to allow members to prepare and/or respond if needed. This includes Lunch and Learns and other such training events. Follow-up will be done within one day of such activities. An annual event calendar may be prepared and posted in the Union office or bulletin board.

G. Appointee Removal: Stewards, Sergeant of Arms and other appointees or Committee Chairpersons not discharging their duties as determined by the E-Board may be removed from their position and replaced. All actions will be documented.

H. Vacating of Office: In the event an officer or appointee vacates his/her position for any reason, the President, with concurrence of the E-Board, may appoint another member in good standing. The member must have maintained membership for at least one year to be eligible for the vacant position. These actions will also be documented.

I. Health and Safety Committee: A Health and Safety Committee will be established in the Local and made up of members who funds have been expended for training. Stewards trained for OWCP issues may be used as part of this committee if needed, but will normally be free to address OWCP issues. This committee will be headed by the Secretary-Treasurer, and any issues will be addressed during the general membership meeting.

J. Morale Committee: A Morale Committee may be formed at the discretion of the E-Board. When formed, it will be chaired by the Vice President for Non-Professionals. The purpose of this committee will be to determine the state of morale for CAVHCS and propose a plan of action. This determination should be based on factual data and not from employees sounding off for isolated incidents. The committee will be responsible

for events and activities that may improve the morale of employees, e.g. Ice Cream Socials, Summer Barbeque, Family Day, Activities or Sports Day, Thanksgiving or Christmas Party (pot luck or otherwise), Amusement Parks, Ball Games etc.. These events can be partnership events with expenses shared with management. Planning will be far enough in advance for members to plan to participate. All suggestions and ideas will be briefed to the E-Board prior to the general membership. The general membership will be briefed at the general meeting, and ideas and assistance may be solicited at that time.

Note #1: As a minimum, **Local 503 will hold two functions for members only annually** e.g. Bowling Night. If desired, one event may be scheduled jointly with Local 110.

Note #2: This committee will work in conjunction with the Employee Association, if formed, to target and resolve morale issues. The Employee Association will have separate leadership and will not be under the direction of the Union. This does not prevent Local 503 members from heading the Employee Association. However, E-Board members are prohibited from holding leadership positions to avoid a conflict of interest.

K. Organizing, Membership, and Recruitment Committee: This committee will be chaired by the Vice President for Professionals. Lunch and Learns, Benefit Coordinators, and other recruitment and retention activities will be coordinated by this committee. All members are encouraged to participate and/or spearhead a Lunch and Learn event.

L. Audit/Budget Committee: The Executive Vice President (EVP) will form this committee and serve in the capacity as alternate Treasurer. The EVP will not be assigned to the committee and will act solely as an advisor. An Audit/Budget Committee should be formed for the membership to conduct at least one audit and examination of financial activities each year. Members of this committee will not include any E-Board member who signs checks or carries a credit card. Examples of what is involved in the audit may be found on AFGE.org.

M. Special Recruitments: All bonus bucks and other such promotions for membership drives will be paid as soon as possible after the event. The E-Board has agreed upon \$60/\$30 during Bonus Buck season and \$30/\$20 for other recruitments. If any person changes their mind before the dues go into effect, the bonus bucks will be returned.

Note: Once initiated, cancellations from membership will only be accepted during anniversary/sign-up month. Members may submit a completed Cancellation of Payroll Deduction for Labor Organization Dues (1188) within two weeks of anniversary month.

N. Member of the Month: An incentive award of \$50.00 will be offered for a Local 503 “Representative of the Month.” This person will be the member, including stewards and E-Board, who had the most impact during that month. This is not a, “It’s his/her turn” incentive. It will be for legitimate contributions to the strength (numbers),

an event, or other contribution that enhanced the Local. Anyone with knowledge of the contribution, including the member, may submit a short write-up. State what the contribution was, when it happened, and the impact it had on the Local. All submissions will be reviewed by the E-Board. If a member of the E-Board is the contributor, the Sergeant-At-Arms will be used to make the deciding vote, if necessary. If it is decided that that the contribution lacks substance, or if there are no submissions, the funds may be redirected to a morale event.

O. Office Maintenance: Files should be purged and properly secured at all times. Furniture will be neatly arranged and not cluttered. Every attempt should be made to allow EMS access to empty trash, maintain the restroom, and vacuum as needed. General cleanliness is the responsibility of the E-Board. Coffee pot, microwave, and refrigerator will be kept cleaned and maintained. No equipment is allowed in the office without an inspection and labels from Bio-Medical Engineers.

P. Voting: At various times throughout the year, issues will arise that require a vote of the membership, e.g. dues increase, budget. Notification will be made prior to any such vote to allow members the opportunity to be present. Only members present at the time may cast a vote, and the entire membership will be affected by the decision.

Q. Membership Meetings: Members are highly encouraged to attend general membership meetings held on the second Tuesday of each month. A lot of useful information and complaint trends are disseminated at these meetings. Light refreshments will be provided each month and a rolling pot of money is in effect. A rolling pot starts with \$25.00. Members are provided tickets when they sign in. These numbers will be mixed with one wild card number per four members present. At the end of each meeting, one number will be drawn. Members must still be present to win. If no one wins, the funds roll to the following meeting. Once the pot reaches \$400.00, it will start over regardless of whether the monies are claimed.

4. **DUTIES OF THE PRESIDENT:** The President shall exercise general supervision over the affairs of the local and see that other officers comply with the responsibilities of their office and constitutional duties; comply with the National and standard local Constitutions; keep the membership apprised of the goals and objectives of the Federation; serve as an ex-officio member of all committees except the Election Committee, Audit Committee, and committee of investigation, or trial committee when he or she is bringing the charges or is directly or indirectly involved in the matter which gave rise to the charges; automatically serve by virtue of office as a local delegate to district caucuses, council meetings, the AFGF National Convention and such other meetings participated in by this Local as the Local may be entitled to vote. The President or designee will preside over all local meetings, review and sign all documents pertaining to the office. If the President is unable to perform his or her regular duties because of sickness, leave, TDY, or for some other legitimate reason, he or she shall delegate the responsibilities of that office to the Executive Vice President. If the Executive Vice President is unable to assume the duties of President, the President shall

delegate the responsibilities of that office to the other Executive Board members depending on availability.

5. **DUTIES OF THE EXECUTIVE VICE PRESIDENT:** The Executive Vice President shall assist the President in the performance of that office. If the president is unable to perform his or her regular duties because of sickness, leave, TDY or for some other legitimate reason, he or she shall delegate the responsibilities of that office to the Executive Vice President if available.

6. **DUTIES OF THE VICE PRESIDENT FOR PROFESSIONALS:** The Vice President, Professionals (VPP), shall work in conjunction with the Executive Vice President to represent the best interests of the bargaining unit as a whole and the individual members of the bargaining unit in their dealings with management and the local. The VPP will also work with the Chief Steward and other stewards as necessary in fact finding, gathering background data, preparing the case for review, and ensuring stewards handle the cases, mainly involving professionals, appropriately.

7. **DUTIES OF THE VICE PRESIDENT NON-PROFESIONALS:** The Vice President, Non-Professionals (VPN), shall work in conjunction with the Executive Vice president to represent the best interests of the bargaining unit as a whole and the individual members of the bargaining unit in their dealings with management and the local. The VPN will work with the Chief Steward and other stewards as necessary in fact finding, gathering background data, preparing the case for review, and ensuring stewards handle the cases, mainly involving non-professionals, appropriately.

8. **DUTIES OF THE SECRETARY-TREASURER:** The duties of the **treasurer** shall be to maintain a bookkeeping system as prescribed by the National Secretary –Treasurer; make a financial report at each regular meeting; keep an up to date roll of the body; receive all monies and/or dues paid into the Local and receipt thereof; keep records of all transactions; deposit money in the bank to the credit of the Local; make regular monthly reports to the NST, which include furnishing names and addresses of all new members or members who have severed their affiliations with the Local and furnishing changes in member's addresses; forward initiation fees and per capita tax to the National Headquarters; in accordance with the requirements of the AFGE National Constitution and perform additional duties and responsibilities as outlined in the Financial Officers Manual Disbursements for payment of current bills (other than initiation fees, per capita tax and approved budgeted expenditures shall be approved by the local. The-duties of the **secretary** shall be to keep a complete record of the minutes of all meetings; maintain all election related documents (including copies of those pertaining to nominations, notices of meetings, and the and the minutes of any meetings, all of which must be sealed and preserved for one year after the election unless the records are requested by higher authorities in the election appeal process; keep up-to-date the official copy of the bylaws of the local; conduct correspondence when directed by the President; and send out notices of meetings when required.

9. **DUTIES OF THE CHIEF STEWARD:** A Chief Steward and such other stewards as may be necessary shall be appointed by the Executive Board. The Chief Steward is a position of extreme importance within the local. The Chief Steward must exercise sound judgment in the handling of complaints and cases or whatever he/she may be tasked to do. He/She must inform the President and each Vice President of any issues surrounding the processing of complaints. The President in coordination with the Chief Steward/E-Board will assign stewards to cases. Each respective Vice (profession or non-professional) must be informed of complaints involving their members and provide guidance and assistance as necessary. The respective Vice will assist the Chief Steward and other stewards as necessary in preparing the case for review by the President.

10. **DUTIES OF THE SERGEANT-AT-ARMS:** A Sergeant-at-Arms shall be appointed by the president. The Sergeant-at-Arms shall ensure that no one enters the meetings without proper authority and assist the presiding officer in the maintenance of order. He will welcome and introduce guests and see that each member's presence is recorded in a log. The Sergeant-At-Arms will provide a roll to call (membership roster) should the recording of individual votes be necessary. He/she will count the votes and ensure the recorder has the number. The Sergeant-At-Arms will perform other duties as assigned by the presiding officer. Should a member be asked to leave, the Sergeant at Arms will ensure that person will not be allowed to re-enter the meeting. No force will be used, and if necessary, the meeting will be discontinued.

11. **DUTIES OF THE STEWARDS:** To assist the Chief Steward and E-Board in processing and resolving complaints and other issues as determined. Stewards, as well as other representatives, will be held accountable for their actions dealing with sensitivity of cases and privacy of information. Stewards of Local 503 are expected to be involved in the operations of the local, to include supporting special events.

12. **DUTIES OF THE WOMEN'S COORDINATOR:**

A. Local Women's Coordinator (LWC) is primarily concerned with any issue that has an adverse impact on women in the workforce. The main objective of the LWC is to assure that the agency maintains policies and practices which are free from artificial barriers to the progress of women. Duties of the LWC may include submitting proposals and recommendation through the appropriate local channel to their agency to adopt policies and programs within their agencies. Among the areas of concern are childcare, gender-based wage discrimination, sexual harassment, alternate work schedules, upward mobility, career development, family friendly leave policies, health and safety matters, and leadership skills development. The above issues are just a few that should be addressed by the Coordinator. All actions to resolve issues may require the LWC to pursue solutions within their agency, through the appropriate local channels, or seek legislative solutions. The LWC will stress the importance of organizing members around these issues and will assist in the recruitment of new members.

B. The LWC will work together with AFGE National, district, council, and local officers to effectively work toward eliminating issues that have an adverse impact on women in the workplace.

C. All newly established local, council, and national steering-type committees shall include in their proposed bylaws, constitution, articles, or articles of operation, the positions and duties of both Women and Fair Practice Coordinators.

13. **DUTIES OF THE FAIR PRACTICES COORDINATOR:**

A. The Local Fair Practices Coordinators (LFPC's) are primarily concerned with equal employment opportunity and affirmative employment in the workplace. Their primary focus is direct assistance and/or counseling to members with inquiries or complaints of discrimination. LFPC's should be familiar with EEO laws and regulations so they can take an active role in the complaint process by assisting stewards with strategies for winning complaints. Another major focus of the LFPC is to assure that agency officials properly identify under-representation of minorities, women, and persons with disabilities. Once an under-representation has been identified, the LFPC will take actions to correct the situation through the appropriate local channel. These corrections may be addressed by working within the agency's EEO program and/or through the negotiation of strong contract language.

B. The LFPC's activities also will include grassroots action on EEO or civil rights legislation, always stressing the importance of organizing new members around these issues and assisting in new member recruitment.

C. The LFPC will work together with AFGE National, district, council, and local officers to effectively work toward eliminating discrimination of any kind in government.

14. **DUES:** Effective January 1, 2007, the dues for Local 503 is \$15.00 per pay period. This amount was established to allow adequate funds for the payment of per capita tax and to provide sufficient funds for the operating expenses of the Local. When the charter of a Local is revoked or whenever a Local disbands, its officers shall be required to turn over all books, records, property, and funds to the National President or his or her representative to be held on account. All such funds shall become the property of the Federation. Dues of Local 503 are set by the National Constitution and will only be raised as the dues for the National body are raised. The dues are currently set below the National since we are able to meet budget obligations. If necessary to raise dues, GS-4 and below will remain the same until membership votes for an increase. This is done to assist members in lower income brackets to maintain their quality of life. Dues for GS-5 and above will rise as voted on at national-level. Notification will be made in advance.

15. **COMPLAINTS AGAINST CASE HANDLING:** Any bargaining unit employee alleging an arbitrary, discriminatory, or bad faith processing of the employee's grievance or other complaint shall appeal timely to the President. Such appeal must be in writing, alleging specific grounds, and must be accomplished within the time requirements set

forth in the bargaining agreement or other applicable proceeding or immediately upon discovery of such alleged improper processing. Upon receipt of the written appeal, the President or designee(s) immediately shall conduct a review and take appropriate action as warranted. Invocation of this appeal procedure for matters of this nature is the exclusive remedy available to an aggrieved employee.

16. **PROCESSING COMPLAINTS:**

A. All complaints must be provided to the union in person and submitted in writing. Address all concerns in the initial complaint. Requests for advice may be handled in an informal manner. In the event there is no one in the union office, the complaint may be dropped in the mailbox outside the union door. The following communications will not be considered official complaints: phone calls, conversations in the hallways, and work area discussions, etc. If unwilling to sign a representation form and provide the complaint in writing, the issue will not be addressed.

B. It is permissible to deliver the complaint to any steward in their work area. However, do not attempt to discuss the case at that time. That person will not be working in a union capacity while on the job. The complaint will be handled as stated in the following paragraphs. Under no circumstances should one discuss issues with the steward in the work area due to privacy and confidentiality concerns.

C. After the union receives the complaint, the Chief Steward and/or President will assign a representative to the case. The complainant will be notified who the representative is, and must meet with the representative face-to-face prior to the investigation. If complainant feels uncomfortable with the appointed representative, they may address their reluctance with the Chief Steward or Executive Board (E-Board) member. Each investigation will be carried out by assigned representative and reviewed by the Chief Steward and/or E-Board.

D. Complainant must meet again with their representative to discuss the findings and to determine how to proceed with the complaint, if necessary. Be advised that all complaints do not warrant filing a grievance. Complainant will be briefed on the merit of the issue during this discussion. Remember, members are an active part of their complaint. Complainant must be truthful and forthcoming with the information they provide. They must also be involved in fact finding, and evidence file and records review as requested.

E. If a grievance is filed and complainant meets with management, they must stick to the issues in the original complaint. Do not bring up new information not discussed with your representative prior to this meeting.

F. There may be times when the representative will ask complainant not to comment. All communication will be done for them. This will only be done in the most sensitive matters, taking complainant's best interest into consideration.

G. At no time will by-name representation be granted to anyone other than authorized representatives of Local 503, i.e. Local 503 officers and stewards.

H. Updates on the status of a grievance will be provided, upon request, by the assigned representative.

I. A waiver of exclusive representation must be obtained from the President or designee if members choose to address issues outside union channels.

J. The Union reserves the right to be present at any negotiations or disputes which could affect bargaining unit employees.

17. **REVIEW**: This policy will be reviewed as needed but not to exceed two years to ensure the needs of bargaining unit employees and this local are properly addressed.

Clifton T. Wrencher, President
Local 503

Date