

Policy Number: EB-FN-01
Policy Title: Contract-Defense Fund
Effective Date: 09/16/20

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Purpose

To set parameters around which expenses are eligible to be funded from the Local 328 contract-defense fund.

Approved Expenditures

The contract-defense fund may be used for the following:

- Bargaining-related expenses
 - Surveys and data gathering
 - Communications (e.g., flyers, stickers, mailings, posters)
 - Member events (e.g., actions, rallies, town halls)
 - Bargaining-team training and support (e.g., binders, pens, meals)
 - Bargaining-team elections and contract-ratification votes
 - Other bargaining-related expenses as needed
- Annual steward-program budget
- Arbitration expenses, including fees to attorneys for assistance in deciding whether to take a case to arbitration.

Account Balance

At no time, barring unforeseen and extraordinary circumstances, should the balance of the contract-defense fund fall below \$250,000. If the balance reaches \$275,000, the treasurer shall make a report to the executive committee for recommendations.

Related Policies: None

Revision History: July 2010

Responsible Office/Committee: Bargaining Team, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-02

Policy Title: Property

Effective Date: 09/16/20

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Purpose

To outline parameters for the handling and disposal of Local 328 property.

General

Local 328 property as discussed in this policy includes but is not limited to computer hardware and software, office supplies and branded items/“swag.” Real estate is not included.

The president shall designate the treasurer to issue property such as computer hardware and software, to maintain an inventory of all property of Local 328 and to dispose of surplus property.

Computer hardware and software assigned to executive-board members is also subject to the Executive-Board Hardware & Software policy.

Storage

Local 328 property may be stored at any building owned by the local, in assigned space at the council office and at the home of board members who are using union equipment.

The treasurer shall have the authority to rent storage space for local property if, in the opinion of the executive committee, such space is needed

Inventory

The treasurer shall review the inventory of Local 328 property once each calendar year; volunteers may be enlisted to assist with this process.

Surplus and Disposal

Following the annual inventory or a change in executive board, some local property may be identified as no longer of use and shall be handled in the appropriate manner.

Inoperable/Obsolete Equipment: Inoperable or obsolete equipment shall be donated to a local non-profit agency or taken to an electronics recycler by the treasurer, as appropriate. A copy of the donation/disposal receipt shall be kept for union records by the treasurer and secretary.

Software/Other Equipment: Software and equipment in good working order shall be described and offered for bid the next executive-board, steward and unit-steward meetings after the property has been identified for surplus. Any board member, steward or unit steward may submit one sealed bid to the treasurer. All bids must be received by the treasurer by 12 noon on the day of the next executive-board meeting. The highest bidder shall be awarded the property; in the event of a tie, the high bidders will be given an opportunity to rebid.

If no bids are received, the property shall be offered to other Council 75 locals at a reasonable cost.

If the surplus property remains unclaimed after the above process, the Local 328 community liaison shall donate the property to a non-religious, non-discriminatory charity. If the community-liaison board seat is vacant, the property shall be donated by the president.

Consumables: Surplus quantities of unused or outdated office supplies, “swag” or other inexpensive property shall be offered by email to the executive board, stewards and unit stewards. The items shall be distributed on a first-come-first-served basis. It is the responsibility of the recipient to make arrangements to collect the items within seven days.

If the items are unclaimed, they shall be offered to other Council 75 locals at no cost.

If the items remain unclaimed after the above process, the Local 328 community liaison shall either dispose of the property or donate the property to a non-religious, non-discriminatory charity.

Related Policies: Executive-Board Hardware & Software

Revision History: July 2010

Responsible Office/Committee: Treasurer, Community Liaison

Policy Number: EB-FN-03
Policy Title: Vendors
Effective Date: 4/16/20

Page 1 of 1

Purpose

When purchasing goods and/or services, it is the policy of AFSCME Local 328 to direct union funds to union vendors/suppliers whenever it is feasible, in order to support the sustainability and growth of trade unionism. This policy sets forth the guidelines around using vendors.

Vendor Priority and Restrictions

Priority shall be given to vendors in the following order:

- (1) Vendors within Local 328 (e.g., OHSU Copy Center for print jobs, OHSU EdCOMM for video production) when feasible and cost effective.
- (2) Vendors within other locals with Council 75 who are able to supply the goods/services needed.
- (3) Other union vendors.
- (4) Local and progressive non-union businesses when no union vendor is available.

At no time shall AFSCME Local 328 funds be directed to non-U.S. vendors or to vendors on the applicable organized-labor do-not-patronize list, nor shall Local 328 members be reimbursed for purchases made to said vendors.

Vendor Quotes

Equipment/Goods: Before making an equipment purchase for which AFSCME Local 328 funds will be used, the purchaser must obtain three (3) price quotes for the equipment to be purchased. If AFSCME Council 75 is able to directly purchase the equipment (using a preferred vendor), no quotes are required. The quotes, along with the equipment specifications, shall be submitted with the Equipment Request Form for executive-board approval.

Services: Before making a purchase services for union funds will be used, the purchaser must obtain two (2) price quotes for the equipment to be purchased. If AFSCME Council 75 has an existing relationship with a vendor for such services, only one (1) additional quote will be needed. The quotes, along with the details about the service/purchase, shall be submitted with the Service Request Form for executive-board approval.

Building-Related Purchases: Existing vendors shall continue to be used when applicable. The above guidelines for quotes shall be used when it is necessary to utilize a new vendor.

Related Policies: MM-BN-02 Reimbursements to Members

Related Documents: Equipment Request Form, Service Request Form

Revision History: 06/15/16, 8/2010

Responsible Office/Committee: Treasurer



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-04
Policy Title: Money Motions
Effective Date: 09/16/20

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Purpose

To set parameters for motions requesting the expenditure of AFSCME Local 328 funds.

General

Any motion that requests union funds to be spent (i.e., money motions) shall identify a funding source prior to its being voted on by the local's executive board.

Money motions may be voted on at regularly scheduled board meetings or via email motions.

Approved Money Motions

Upon approval of a money motion at an executive board meeting, the secretary shall assign a money-motion number to the motion in the minutes. The money-motion number shall include the month of the meeting, a number designating the motion and the year of the meeting. For example, a money-motion number of mm#040219 indicates that the motion was the second money motion approved at the April 2019 board meeting. Following each board meeting, the secretary shall email the treasurer with the verbiage and money-motion number for each approved motion requesting funding.

Upon approval of an email money motion, the secretary shall assign a money-motion number for the record of the electronic vote. The number for an email money motion shall be the date that the email vote closed. For example, a money-motion number of emm#20180906 indicates that the motion was approved in a vote that closed on September 6, 2018.

Related Policies: Email Voting by Executive Board

Related Documents: Project Charter Form; Project Charter Form—Donation

Revision History: April 2011

Responsible Office/Committee: Local 328 Secretary, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-05

Policy Title: Alcohol Expenditures

Effective Date: 04/21/21

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Purpose

To provide clarity around the permissibility and approval of alcohol purchases for/at union events.

Permissibility

Alcohol, as a legal beverage for those 21 and over, may be purchased for union events and should be considered comparable to other beverages/refreshments.

Approval

Alcohol expenditures do not require special pre-approval from the Local 328 executive board or other body.

Related Policies: None

Revision History: 3/2021, 10/2012

Responsible Office/Committee: Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-06
Policy Title: Check Signing
Effective Date: 09/16/20

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Purpose

To define the parameters to be followed when checks are signed on behalf of AFSCME Local 328.

Approved Signatories

The only authorized AFSCME Local 328 check signers are the union treasurer, president, vice president and secretary.

All checks drawn on Local 328 funds must be signed by the treasurer and one additional signatory.

Exceptions

If the check is payable to the treasurer, it must be signed by any two other signatories.

If the check is payable to one of the other signatories, it must be signed by the treasurer plus another signatory other than the payee.

Related Policies: None

Revision History: 2015

Responsible Office/Committee: Treasurer, Other Check-Signing Officers



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-07
Policy Title: Officer Stipends
Effective Date: 09/16/20

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Purpose

To set forth parameters for how stipend amounts are approved, how stipends are disbursed and how officers remain eligible to receive stipends.

Eligibility

Stipends are paid monthly to the executive-committee officers: president, vice president, secretary, treasurer and chief steward. To receive a stipend, an officer must regularly and reliably perform the required duties listed in the position description of the office and demonstrate attendance and work output commensurate with the monetary amount of the stipend.

Stipend Amounts

Stipend amounts are incremental and based on the officer's experience in the role. Individuals new to an office shall receive a lower base stipend.

An officer may request a workload-/merit-based upward adjustment on an annual basis. Such requests must be accompanied by a justification (verbal or written) for the increase; an officer's stipend will not be increased simply because another officer's stipend has been increased.

Officers may request to waive their stipend on a month-to-month basis should circumstances prevent them from fulfilling the duties of their office. Officers may also opt to waive their stipend on an ongoing basis.

Approval

As part of the annual budget presentation in November, stipend amounts and any increase requests are presented to the executive committee for review and a recommendation to the board. The executive board then votes whether to approve the requested officer stipends.

Disbursement

Upon their election, officers shall provide the relevant tax and bank information to the Local 328 treasurer, who shall relay the information to the payroll processing company used by the union. Stipends are disbursed to officers via direct deposit.

Related Policies: Duties of Executive Board Officers, Executive-Board Attendance Expectations

Related Documents: Officer Position Descriptions

Revision History: 2012

Responsible Office/Committee: Executive Board, Treasurer



Policy Number: EB-FN-08
Policy Title: Executive Board Incentives
Effective Date: 01/17/18

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Purpose

To incentivize and compensate Local 328 executive-board members to fully participate in board activities and responsibilities.

Eligibility

Executive-board members will be eligible for a \$10.00 incentive for each month when both of the following requirements have been met:

- Attendance at the month's board meeting. (Board members who request to be excused from a meeting in advance of the meeting will be deemed to be in compliance with this requirement.)
- Response, before the close of the vote, to any email motion occurring during the month. (Board members who have set an out-of-office notification on their union email or have otherwise notified the president in advance that they will be unable to participate in the vote will be deemed to be in compliance with this requirement.)

Payment of Incentive

Each board member's monthly incentives will be tallied annually, to be paid out to the member each December.

The board member must be an active member of the executive board at the time the incentives are paid out in order to receive the payment; e.g., a member who was eligible for the incentive in January and February but resigned from the board in March would not receive a payment in December.

Exceptions

Officer stipends are managed separately from this policy; officers are not eligible for the \$10.00/month stipend described in this policy.

Related Policies: EB-MS-05 Duties of Executive Board Members; EB-MS-01 Executive Board Attendance Expectations

Related Documents: None

Revision History: None

Responsible Office/Committee: Executive Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-09

Policy Title: Local 328 Credit-Card Usage

Effective Date: 02/19/20

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Purpose

To outline the parameters under which the union may maintain and use a Local 328 owned credit card.

General

Local 328 owned credit cards are authorized to be issued only to the union treasurer and/or to a union check-signer (president, vice president or secretary) designated by the treasurer; no other parties are authorized to use such cards. Local 328 owned credit cards shall only be used for approved union purposes and activities.

All expenditures resulting from the use of the Local 328 owned credit card shall be documented and reported in accordance with local expense accounting practices, procedures and forms, as well be in compliance with the International Financial Standards Code.

Set-Up Guidelines

When setting up a Local 328 owned credit card, the issuer (e.g., bank or credit union) must be informed of the following guidelines, in order to ensure fiscally responsible usage of the card:

- The credit card shall not allow cash withdrawals or have debit-card functionality.
- The card shall not be prepaid.
- Blank checks shall not be issued for the account.
- The card shall be issued in the name of the position authorized to use the card (e.g., Local 328 Treasurer) rather than in the name of the individual office holder.
- Monthly statements should be sent to the Local 328 treasurer.

Usage Guidelines

Any expenditures made with the Local 328 owned credit card must be included as a line item in an approved budget. Prior to the credit card being used for the expenditure, executive-board approval must be obtained to use the card for said purchase.

Personal charges are prohibited. If a Local 328 owned credit card is inadvertently used for personal charges, the cardholder shall immediately reimburse the union for such charges.

Reconciliation

The cardholder must submit an itemized expense report (e.g., the Local 328 Check Request Form) for every charge made on the Local 328 owned credit card. The expense report must include:

- Union purpose for the charge
- Credit-card receipt
- Itemized sales slip

The treasurer should submit these expense reports to the local president for review and approval; other cardholders should submit their expense reports to the treasurer for review and approval. Upon approval by the appropriate party, the expense report shall be forwarded to the Local 328 bookkeeper for processing.

Related Policies: None

Related Documents: International Financial Standards Code, Local 328 Check Request Form

Revision History: None

Responsible Office/Committee: Treasurer



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-FN-10

Policy Title: Transportation Reimbursement

Effective Date: 09/16/20

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Purpose

To ensure that executive-board members and other Local 328 activists without a personal vehicle or a suitable public-transportation option are able to participate in union events, and to establish financially prudent parameters around reimbursing rides.

Eligibility

Transportation (e.g., ride-share service or taxi) may be reimbursed under the following circumstances:

- Executive-board members who need a ride home from board meetings, which often run late and when public transportation is less frequently available.
- On a case-by-case basis, members who need transportation for an official union event or committee meeting, such as bringing supplies to an event when public transportation would not be feasible. (Approval is needed by the executive committee or the appropriate committee chair.)

Before utilizing a ride-share service or taxi, members are first encouraged to carpool with one another or arrange a ride with a friend or family member if possible.

Committee chairs who expect to utilize ride-sharing services on a regular basis for committee business should request the funding in their budget or report to the executive board on how the previously approved budget will be reallocated to fund the rides.

Reimbursement

Members should request reimbursement per the Reimbursements to Members policy. The check-request form should include a ride receipt and indicate why a ride-share service or taxi was used instead of public transportation.

Members may be reimbursed for transportation up to \$120 per year; reimbursements for individual rides shall not exceed \$25. Members whose expenses exceed \$120 within a calendar year, may then be reimbursed for the equivalent of mileage at the current IRS mileage rate.

If the ride-sharing service being used offers split fares, each member may request reimbursement from the union. Otherwise, the union will issue one reimbursement, to be split between the members sharing the ride. It is expected that, prior to requesting reimbursement, members will make their own agreement regarding how to split the reimbursement.

Under special circumstances, these reimbursement limits may be modified on a one-time basis by the executive board.

Related Policies: Reimbursements to Members

Related Documents: AFSCME Local 328 Check Request Form

Revision History: None

Responsible Office/Committee: Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-MS-01

Policy Title: Executive Board Attendance Expectations

Effective Date: 09/16/20

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Purpose

To inform executive-board members of the union's expectations around attendance at board meetings and the consequences of unexcused absences.

Attendance Expectations

It is expected that board members will attend all executive-board meetings. It is understood that board members may occasionally need to miss a meeting for both planned reasons (e.g., vacations, doctor's appointments, etc.) and unplanned reasons (e.g., illness, car trouble, etc.). Such absences shall be considered either excused or unexcused.

Excused Absences

In order for an absence to be considered excused, the board member must notify both the union president and secretary, prior to the start of the meeting in question. As much notice as possible should be given for both planned and unplanned absences.

Notice should also be given if a board member will be significantly late to a meeting or need to leave a meeting early.

Work should not be a hindrance for meeting participation, since board members are covered by release time to attend the meetings.

Unexcused Absences

An absence will be considered unexcused if no notice is given or if notice is received after the meeting.

Board members will not be eligible for a monthly incentive payment in months when they have an unexcused absence from an executive-board meeting.

Repeated unexcused absences may result in a board member's removal from office.

Removal from Office

If a board member has two consecutive unexcused absences, the union president shall reach out to the member to check in and remind the board member of this policy.

After a third consecutive unexcused absence, the name of the board member in question shall be brought to the executive board for a vote on whether to remove the member from office. The seat will be declared vacant upon a majority vote of the executive board; the seat will remain occupied failing a majority outcome. Within five days of the vote, the board member in question shall be notified of the outcome of the vote, in writing, by the union president.

If the board seat is vacated (whether by vote or resignation) and

- (a) There is more than one year remaining in the term, an election will be conducted and the seat filled by a vote of the membership.
- (b) There is less than one year remaining in the term, the vacancy will be filled by an appointment by the union president, subject to approval by the executive board.

If the board seat remains occupied, the board member will be informed that a fourth consecutive unexcused absence shall be deemed a resignation from the board and the seat will be vacated immediately.

Related Policies: Executive Board Incentives

Revision History: 7/2010; 10/2008

Responsible Office/Committee: Executive Committee, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-MS-02
Policy Title: Arbitrations
Effective Date: 04/21/21

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Purpose

To establish a clear process for the approval of arbitration requests from staff.

Approval Process

Arbitration requests must be submitted by staff to the executive committee for initial review using the Arbitration Request form, in order to ensure that the executive board has sufficient information to make a determination on the request. Any relevant documents should be submitted with the form. Requests should be submitted for initial review no later than the executive-committee meeting held prior to the executive-board meeting at which the request will be voted on.

The executive committee will make a determination on whether (a) the member should attend the board meeting to discuss the case and (b) additional information would be helpful for the board to make a decision. After the executive committee has determined its recommendation to the executive board, the arbitration-request materials shall be circulated to the board for review prior to the next scheduled board meeting. No arbitration request shall be considered by the board unless the materials were circulated prior to the meeting at which the vote will take place.

After review of the arbitration request, the executive board shall vote whether to approve the request. A simple majority will be required to advance a case to arbitration. No case shall be advanced to arbitration without the approval of the Local 328 board.

Grievant Notification & Appeals

The grievant shall be notified of the executive board's decision within three business days by the Local 328 president.

Grievants shall also be provided with information regarding how to contact the Oregon AFSCME Council 75 executive director should they wish to appeal the board's decision. Final decision-making authority resides with the council executive director, who shall notify both the grievant and the Local 328 executive board in writing of any decision made on an appeal.

Executive-Board Updates

Staff shall provide the executive board with arbitration updates (including scheduling, settlement offers and final decisions) as information becomes available.

Related Policies: MM-CD-01 Member Appeals

Related Documents: Arbitration Request Form

Revision History: 3/2021, 7/2010

Responsible Office/Committee: Executive Committee, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-MS-03

Policy Title: Email Voting by Executive Board

Effective Date: 09/16/20

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Purpose

To ensure that the process for email motions and voting by the Local 328 executive board is clear and understood by board members.

General

All executive-board members are provided with a Local 328 email address. It is expected that board members will check this email address regularly, as per the position description for their board position, and respond to any email motions that are initiated.

Criteria for Email Motions

Executive-board business should generally be conducted during the monthly board meetings. However, under certain circumstances it may be necessary for the union president to make an email motion. Email motions should only be made if a matter is time sensitive and cannot wait until the next scheduled executive-board meeting.

If the motion involves the expenditure of union funds, the total amount being voted on shall not exceed:

- \$1,000 for contract-defense matters (e.g., pre-approved arbitrations, bargaining costs, etc.) or
- \$500 for all other matters.

Email motions shall remain active for voting for three full business days.

Process for Email Motions and Voting

- (1) The Local 328 president (or vice president, in the president's absence) will email the board with information and supporting documentation about the matter at hand, making the motion and asking for a second.
- (2) A board member will reply to all and second the motion.

- (3) The president will then email the board again to confirm that email voting is open and let board members know when the voting period will close.
- (4) Board members shall reply to all when asking questions about the matter being voted upon.
- (5) Board members shall reply only to the union president to cast their vote and may change their vote at any time prior to the close of voting.
- (6) The president will email the board at the close of voting with the results of the email vote, attaching a copy of the voting tally.
- (7) The union secretary will assign a motion number and file the voting tally with the union's records.

Related Policies: Money Motions, Duties of Executive Board Members

Related Documents: Executive Board Email Motion Tally

Revision History: 2015; 7/2010

**Responsible Office/Committee: Local 328 President, Local 328 Secretary,
Executive Board**



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-MS-04

Policy Title: Executive-Board Hardware & Software

Effective Date: 09/16/20

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Purpose

To delineate which board positions are eligible for union-provided hardware and software, and to outline the parameters under which board members receive and may purchase the equipment used in their office.

Eligibility for Union-Provided Hardware and Software

The following executive-board positions shall be provided computer hardware and software with which to perform the duties of their office: president, vice president, secretary, treasurer, chief steward and internal communications chair. The executive board may approve the use of a union-provided computer or other equipment to other board members upon request.

If a suitable computer, software or equipment is not available from the previous officeholder, the board member requiring such items shall follow the process outlined in the Vendors policy.

Issuance

All property issued to a board member shall be accompanied by a written notice specifying the property issued and stating the conditions for its return.

Recipients who have been issued union property agree to maintain said property in good condition and to notify the local of any problems that arise.

Disposition of Hardware and Software at End of Term

Upon the end of the term of the board position or the resignation of the member from the executive board, the board member shall notify the treasurer within three days whether the hardware or software will be returned to or purchased from the union. Only board members who have completed at least a full two-year term of office shall have the option to purchase the union-provided computer, software or other equipment they have been using.

Return: Unless being purchased, all union-provided property shall be returned to the treasurer within 14 days of the board member's end of the term or resignation from the executive board. Personal data and information must be removed from the computer prior to its return to the union.

If equipment is not returned within this time frame, the treasurer shall issue a written notice requiring that the equipment be returned within 30 days of the issuance of the notice and stating that the union will take appropriate legal action to secure the return of the property or recover any losses. Any exceptions to the above process must be approved by the executive board.

Returned property shall either be reissued to the successor in office or processed according to the Property policy. The treasurer shall reissue equipment in good working order to the successor in that office within 7 days of the equipment's return.

Purchase: In order to determine fair market value of the item(s), a board member who wishes to purchase equipment upon leaving the executive board shall gather two estimates from different computer resale vendors or other appropriate vendors. The amount to be paid to Local 328 for the equipment by the board member shall be determined by averaging the two estimates.

Budget Considerations

A line item for equipment purchases shall be included in the annual Local 328 operating budget.

Related Policies: Property, Vendors

Related Documents: Equipment Request Form

Revision History: July 2010

Responsible Office/Committee: Treasurer, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: EB-MS-05

Policy Title: Duties of Executive Board Members

Effective Date: 09/16/20

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Purpose

To set forth the duties, both mandatory and optional, of Local 328 executive-board members.

Assignment of Duties

The duties and responsibilities of executive-board members (including officers) will be assigned by the president and confirmed by the executive board unless otherwise specified in the AFSCME Local 328 constitution.

Mandatory Duties

Checking Union Email

Officers are expected to check their union email address on a daily basis. At-large executive-board members are expected to check their union email address a minimum of twice per week. All other board members are expected to check their union email address a minimum of three times per week.

Attending Monthly Board Meetings

All executive-board members must attend and fully participate in all board meetings; members who need to be excused from a meeting should follow the procedure outlined in the Executive Board Attendance Expectations policy.

All officers and executive board members (except those in at-large positions) must present a report, preferably in writing, on their activities to the board each month. Board members are expected to submit their reports to the Local 328 secretary by the Friday preceding each board meeting; reports may be accepted at later dates as well, at the secretary's discretion.

All executive-board members are expected to be fully prepared for board meetings, having read all submitted reports and other materials, as well as to actively participate in the meetings.

Participating in Email Votes

All executive-board members are expected to vote in all email votes conducted by the union president, as described in the Email Voting by Executive Board policy.

Fulfilling Position-Specific Required Duties

All executive-board members are expected to fulfill the required duties described in the position descriptions for their specific board position.

Optional Duties

Participating in Position-Specific Suggested Activities

All executive-board members are strongly encouraged to take part in the suggested activities described in the position descriptions for their specific board position.

Volunteering

Local 328 executive-board members are encouraged to provide additional volunteer service with our union. Available opportunities include: assisting with the Labor Day Picnic, canvassing for political candidates or ballot measures, attending Portland Jobs with Justice actions, presenting at OHSU's new-employee orientation, writing content for the Local 328 blog, participating in community volunteering activities (e.g., Oregon Food Bank), tabling, serving on committees, etc.

Conduct

Local 328 executive-board members are expected to exhibit respectful conduct in all union meetings and activities.

Related Policies: Executive Board Attendance Expectations; Email Voting by Executive Board

Related Documents: Board and Officer Position Descriptions

Revision History: 7/2010

Responsible Office/Committee: Executive Board

Policy Number: EM-BN-01

Policy Title: Education, Trainings and Non-Convention Events

Effective Date: 04/21/21

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Purpose

To clearly define the parameters regarding members attending trainings and other non-convention, union related events.

Requirements to Attend

Any member who has been a member in good standing and is not on their initial six-month probation period qualifies to go to a training or conference.

New members requesting to go to training will have priority over those who have gone in the past. If applicable, the local will attempt to send at least one person who has gone before to help those who are new.

Training/Event Application

The education/training committee chair will review all requests to attend trainings/non-convention events that incur costs to the local:

- If there are more members who wish to attend an event than there are openings, all interested members will be required to complete and submit an Education/Training/Event Application to the education/training chair within a timeframe specified. Applications will be available online with the training information. The education/training committee will evaluate the applications received to determine who will attend the training based on the information in the application, the members' record of attendance at/participation in previous events, etc.
- If there are fewer members who wish to attend an event than there are openings, all interested members will be required to express their interest to the education and training chair in a manner to be determined by the chair. The chair will evaluate the requests received to determine whether the member will attend the training based whether s/he has attended the training/event previously, the member's record of attendance at/participation in previous events, etc.

Lost Time/Per-Diem

Lost time and per-diem will not be available for non-convention events unless otherwise noted on the training itself. Please refer to the Lost Time policy.

Attendance

Members will need to sign an Attendance Agreement form indicating their intent to participate in the training while there. In the event it is reported back that the member did not attend and/or participate, s/he will be required to pay back the local any funds already paid out (up to the full amount) on his/her behalf, will not be eligible for any reimbursements, and will be unable to attend any union-paid events for 18 months. In the event that a refund to the union is required, the education/training chair will work with the Local 328 executive committee to determine the amount owed, etc.

Reimbursements

All reimbursements will adhere to the Reimbursements policy.

Post Training/Event Requirement

Members will be expected to write a report, to be published on the Local 328 website, about the event/training they attended. If the member does not wish for his/her report to be posted on the website, s/he will give a presentation on the report to the union executive board.

Failure to do so will result in the member being ineligible to attend other non-convention events/training at cost to the local for 18 months. The member has a right to appeal this decision as per the Appeals policy.

Related Policies:

- Appeals**
- Reimbursements**
- Lost Time**

Related Documents:

- Attendance Agreement**
- Education/Training/Event Application**

Revision History: 3/2021, 12/2015, 7/2010, 10/2008

Responsible Office/Committee: Education/Training Chair & Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-BN-02

Policy Title: Mileage Reimbursement

Effective Date: 09/16/20

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Purpose

To ensure that Local 328 activists are reimbursed appropriately for union-related travel, and to establish financially prudent parameters around reimbursing rides.

Eligibility

To be eligible for mileage reimbursement, travel must relate to official Local 328 business and must have been preapproved by the Local 328 executive board or, in some circumstances, executive committee. Only dues-paying Local 328 members may be reimbursed.

Mileage will be reimbursed, at the IRS standard mileage rate in effect at the time of travel, in the following cases:

- Local 328 member traveling more than 25 miles round-trip on union-related business.
- Local 328 member traveling more than 50 miles on union-related business in one calendar month.
- Case-by-case basis, upon request, as determined by the executive committee.

Members should request reimbursement per the Reimbursements to Members policy. The check-request form should include distance documentation (e.g., Google map/directions) for the travel.

Related Policies: Reimbursements to Members

Related Documents: AFSCME Local 328 Check Request Form

Revision History: October 2008

Responsible Office/Committee: Treasurer, Executive Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-BN-03
Policy Title: Reimbursements to Members
Effective Date: 09/16/20

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Purpose

To clearly define the parameters regarding reimbursements to members.

Eligibility

To be eligible for reimbursement, an expenditure must relate to official Local 328 business and must have been preapproved by the Local 328 executive board. Only staff or dues-paying Local 328 members may be reimbursed.

Members and staff will not be reimbursed for purchases made from non-U.S. vendors or to vendors on the applicable organized-labor do-not-patronize list.

In order to be reimbursed, the member must submit to the treasurer a completed check-request form and required supporting documentation.

Travel-Related Reimbursements

Travel-related reimbursements are governed by the separate policies referenced below.

Related Policies: Mileage Reimbursement, Transportation Reimbursement

Related Documents: AFSCME Local 328 Check Request Form

Revision History: October 2008

Responsible Office/Committee: Treasurer, Executive Committee

Policy Number: MM-BN-04
Policy Title: Local Elections
Effective Date: 07/25/18

Page 1 of 4

Purpose

To ensure that the elections process is clear to member, local elections are conducted in a fair manner, and members are given adequate information to make an informed vote.

Eligibility

To be eligible to run for local union office or delegate, a candidate must be a member in good standing for at least one year immediately preceding the election.

All members will be given a reasonable opportunity to vote. Represented employees who are not dues-paying members may sign a membership card and vote during any election.

Elections Committee

Elections shall be held as mandated by governing constitutions, policies, bylaws, etc. <https://www.afscme.org/document/AFSCME-Local-Union-Election-Manual.pdf>

The elections committee chair is appointed by the local president and serves at the pleasure of the local executive board. Either the chair or the local president may select other members to serve on the elections committee. No candidate for office is allowed to serve on the elections committee. The elections committee will not be discharged prior to 10 days following an election.

The elections committee shall:

- Make recommendations to the local executive board on to how the elections will be conducted—any recommendation would need approval by the board prior to implementation.
- Ensure that proper notice of the election is given.
- Assign someone to verify each nominee's eligibility to run for election. Ensure that each nominee has the opportunity to decline nomination, by sending an email to the nominee at the time of nomination.

- Email each candidate at the close of nominations with a copy of the elections policy and campaigning tip sheet, drawing attention to the candidate statement opportunity and submission deadline and reminding them of the election dates.
- Hear valid eligibility challenges as soon as possible and decide the matter prior to the election.
- Remind candidates of the deadline to submit candidate statements.
- Supervise the ballot creation—candidate names will be chosen at random in the presence of at least two people and be listed, by position, in the order chosen.
- Designate a contact person in case of technical problems during voting.
- Task volunteers to assist voters as necessary.
- Conduct the ballot count and certify the results of the election.
- Notify candidates of the election outcome.
- Hear and resolve any protests concerning the conduct of the election.
- Make a report to the membership on the results of the election and the decision made on any protests.

Nominations

A notice of nominations will be mailed to each member at their last known address no less than 5 days prior to the opening of nominations. The notice should indicate what offices/positions will be voted on, the dates and times of the nomination period and the dates and times of the election.

Candidate Statements

The local union will publish candidate statements to be distributed to the membership for any contested election, following the criteria set by both the local union's elections committee and the international union's elections code. Such publication will clearly state that the local makes no endorsement of candidates.

Candidate statements are optional. To be eligible for publication, statements must be:

- Submitted to the elections committee chair within one calendar week after the close of nominations.
- No more than 250 words.
- Limited to text only.
- Free of demeaning, derogatory or inflammatory language.

Candidate may include in their statements endorsements from other union members or labor partners, as well as links to external websites.

The elections committee chair will review the statements for compliance. Any language in a candidate statement that is a violation of policy may be redacted by the elections chair prior to publication. Candidate statements that are compliant will be forwarded to the local's internal communications committee chair for publication by the date of the election. Statements will be published verbatim and listed in the order received.

Campaigning

Candidates are bound by OHSU's rules concerning on-duty conduct during their campaign. If, for example, candidates want to go to other work areas to campaign, they do not have access to the contract language permitting union officials to access worksites (even if the candidate is a union official); they would have to work with supervisor of the work area to obtain permission to campaign there.

Permitted Activities: Candidates for a local office or position may send one hard-copy mailing to the last known address of eligible voting members through the union office prior to the election. The candidate, not the union, pays any costs for the mailing, including printing and postage.

Otherwise, candidates may use their own resources to campaign (e.g., distribute flyers; talk to coworkers; create and use social-media accounts, websites, direct mail and email; form a campaign committee; conduct online surveys or distribute campaign-oriented items such as pens, buttons and or other branded trinkets). These activities must be undertaken at the candidates' own expense and without using local union resources.

In certain elections, the union may host a candidate forum in which all candidates are permitted an equal opportunity to participate.

Prohibited Activities: Candidates may not use any local union resources for their campaign. They may NOT: use union funds or billing codes to make copies or place printing orders; use their access to union infrastructure to obtain mailing lists, phone numbers or campus-mail location codes; claim an endorsement by any union body (such as the executive board or steward program) or post individual campaign material on Local 328 websites, social-media accounts or bulletin boards.

Individual campaign material posted on Local 328 websites, social-media accounts or bulletin boards will be removed immediately. Candidates who have engaged in prohibited activities will be notified of the violation.

AFSCME staff representatives shall not offer any sort of endorsement or otherwise offer support for any candidate. Anyone holding a local office/board seat, serving as a steward, or otherwise serving in an official union role may not use their title in endorsements of candidates.

Voting

Only dues-paying members may vote in a local union election. No member is allowed to vote by proxy (i.e., cast another member's vote). Elections are conducted by a secret, secure, electronic ballot. In the event that a member is unable to vote electronically due to technical issues, the member will be given the opportunity to cast a secret, provisional paper ballot through means determined by the elections committee. Any candidate whose name appears on the ballot has the right to have an observer present when the ballots are counted.

Runoffs and Protests

Runoffs: When a candidate receives a majority (more than half) of the votes in election, they are declared elected. Should no candidate receive a majority of votes, a runoff election will be held. For single-post offices (e.g., president), the two candidates who received the most votes will be on the runoff ballot. For multi-post offices (e.g., at-large board members), the threshold to be listed on the runoff ballot is determined by the formula in the AFSCME Local Union Election Manual. The local union must give 15 days' notice of the runoff election.

Protests: A protest questions the conduct of an election. Only dues-paying members may file a protest. Any protest regarding an election must be filed immediately upon the election's completion or within 10 days thereafter. Protests shall be filed in writing to the elections committee chair. Final decision on a protest shall be made by the membership, and decided within 30 days of the filing of the protest. If the membership finds that violations may have affected the outcome of the election, all or part of the election may be ordered to be set aside and another election will be held.

Related Documents: [AFSCME Local Union Election Manual](#), **Member Resources Tip Sheet: Campaigning for Union Office**

Revision History: 6/2014 2/2010

Responsible Office/Committee: Elections Committee



Policy Number: MM-BN-05

Policy Title: Lost Time

Effective Date: 05/19/21

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Purpose

Lost time is paid by the union so that members may participate in approved union activities during work time without a loss of pay. Payment of lost time is intended solely to make the member whole.

This policy sets forth the parameters under which the union will pay for release from work so that:

- Members needing to use lost time have a clear understanding of the process.
- The union has guidelines for financially prudent payment for lost time.

General

All lost-time requests must be approved by the Local 328 executive board or be otherwise mandated by the contract.

All lost time must be promptly reported to the treasurer.

Unapproved lost time/lost time used outside of the parameters of this policy will not be paid or reimbursed by the union.

Approved Use of Lost Time

Examples of approved use of lost time include executive-board meetings, certain committee meetings, union conventions and educational/training events approved by the executive board via a project charter.

Payment of lost time is intended solely to make the member whole. As such, lost time will not be paid when such payment would:

- Result in the member being paid for more than a 40-hour work week.
- Result in the member being paid for participating in union activities outside his/her standard shift length.
- Result in the member being paid for participating in union activities taking place on his/her usual day(s) off.
- Result in the member being paid for attendance at a union event at which the member did not actually attend/participate.
- Result in the member being paid for attendance at a union event when lost time was not included in the approved project charter.
- Result in overtime of any kind.

Examples:

If a member who works Monday-Friday is attending a convention Friday-Sunday and has already worked 38 hours during the work week, s/he would only be paid for two hours of lost time for Friday.

If a member logs in remotely to work for the employer in the morning before convention business commences, that time would be deducted from the amount of lost time paid.

If a member who works Monday-Friday is attending a convention Friday-Sunday and has already worked 32 hours during the work week, s/he would be paid for eight hours of lost time for Friday.

If a member has already worked his/her regular shift from 8:00 a.m. – 4:30 p.m. before attending an executive-board meeting starting at 5:30 p.m., s/he will not be paid lost time. Even if the member flexes his/her schedule and returns to work after the meeting, lost time will not be paid outside of the regular shift.

If a member's regular shift is 8:00 a.m. – 8:30 p.m., s/he would be paid lost time while attending an evening board meeting, for the time spent in the meeting. (The member is expected to return to work if, for example, the meeting ends at 7:00 p.m.)

If a member attends a mid-week conference at which per diem was included in the project charter but lost time was not, the member will not be paid lost time and would need to use vacation time (or make up the hours if s/he has a flexible schedule).

Reporting

Members will report lost time related to standing meetings, regularly scheduled union work, etc., by emailing the treasurer a list of the meeting dates and information.

All other lost time, such as for conferences, shall be reported to the treasurer as soon as possible after it is incurred; this reporting will entail emailing a copy of the applicable Kronos timecard to the treasurer.

The member shall respond promptly if the treasurer has questions about his/her use of lost time.

Processing of Unauthorized Lost Time

Unauthorized lost time will not be paid by the union.

If the member has reported his/her use of lost time inaccurately, corrections will be made in Kronos and any overpayment will be reversed. In the event that the overpayment cannot be resolved using the employer's payroll system, the member may be invoiced by the union for reimbursement.

A member who repeatedly logs unauthorized lost time may have his/her privileges to attend union events and activities revoked and may be at risk for disciplinary action by the employer depending on the circumstances.

Related Policies:

EM-BN-01 Education, Trainings and Non-Convention Events

Revision History: 3/2016, 12/2015, 4/2011, 7/2010

Responsible Office/Committee: Treasurer; Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-BN-06

Policy Title: Committees

Effective Date: 09/16/20

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Purpose

To establish parameters for the existence and functioning of AFSCME Local 328 committee, and for union representation on OHSU committees.

General

The local may have standing and ad hoc committees.

- Standing committees are permanent fixtures of the union, covering the following areas that are core to the local's operations: community outreach, education and training, internal communications and political action.
- Ad hoc committees, such as the policy committee, serve at the pleasure of local president and shall be created and disbanded as needed.

Local 328 may also have representatives on OHSU committees, such as the Employee Benefits Council and the retirement-plan advisory committee. Some of these committees are established as part of our contract; others are solely the purview of the employer.

Membership

Local Committees: The Local 328 president is a *de facto* member of all local committees. Chairs of standing committees are elected positions and serve on the Local 328 executive board for a term of two years. Dues-paying members in good standing may apply to serve as a member of any union committee.

OHSU Committees: The membership of OHSU committees established as part of our contract is set forth in the contract language. The membership of other OHSU committees is determined by the employer. Dues-paying members in good standing may apply to serve as a member of any OHSU committee; these committees may have additional eligibility requirements.

Authority and Jurisdiction

Committees, whether standing or ad hoc, shall not make policy on behalf of the local. Only the Local 328 executive board may make and approve policies. Notwithstanding the above, the union's policy

committee shall draft and amend policies for the local as it deems appropriate (or as requested by the union president). Such policies shall not be considered to be in effect until approved by a majority vote of the executive board.

All committees are encouraged to develop and publish a committee description/charter that outlines the purpose, vision and functioning of the committee. All committees shall reserve the ability to develop procedures as they deem necessary and appropriate to govern the internal functioning of the committee.

Committee Information

AFSCME Local 328 shall make the following committee information available on its website:

- Committee name
- Committee-chair name and contact information
- Committee description, charter or mission statement, if available

The following information may also be included:

- Details re: public meetings or gatherings
- Committee-member names
- Proposed committee procedures that may affect the general membership
- Activities organized or sponsored by the committee

Related Policies: Policy Creation and Revision

Related Documents: Board Position Descriptions, Committee Application Form

Revision History: August 2010

Responsible Office/Committee: President, Committee Chairs

Policy Number: MM-BN-07

Policy Title: Resolutions

Effective Date: 09/16/20

Page 1 of 1

Purpose

To outline the process by which a resolution may be presented at a union convention.

General

Any member in good standing may prepare a resolution to be presented at a convention to which AFSCME Local 328 sends elected delegates. An ad hoc committee shall be appointed to review such draft resolutions, making modifications as deemed necessary.

Approval Process

Whenever possible, draft resolutions should be submitted to the union 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
- Reject the resolution

A proposed resolution that has not been endorsed by the union's executive board will not be presented at a convention under Local 328's auspices.

Resolutions Presented by Individuals

Should a member who proposed a resolution (a) disagree with the position taken by the executive board and (b) be a delegate to the convention in question, the member is free to 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 Local 328 executive board, the union's delegation is in no way required to support the resolution.

Related Policies: None

Revision History: August 2010

Policy Number: ##-##

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Responsible Office/Committee: Executive Board



Policy Number: MM-BN-08
Policy Title: Policy Creation & Revision
Effective Date: 01/20/21

Purpose

To delineate how Local 328 policies are created and amended, expanding upon Article XI of the Local 328 constitution.

General

New policies and amendments to existing policies may be proposed by any Local 328 member in good standing.

Active policies will be posted on the Local 328 website.

Policy Committee

A policy committee shall be established for the purpose of reviewing, amending and creating policies as needed. The Local 328 president shall serve as the chair of the policy committee. The policy committee shall meet at least quarterly; meeting dates shall be announced to the general membership at least a month in advance.

The work of the policy committee may also be conducted via email and file-sharing applications such as Box.com.

Policy Revisions

The policy committee will review existing policies and member requests for amendments at least quarterly, making revisions and updates as needed. Draft revised policies will be presented to the Local 328 executive board for review and approval.

Policy Creation

The policy committee will meet (either in person or virtually/via email) on an ad-hoc basis when a need for a new policy arises. New policy drafts shall be circulated within the policy committee for review and revisions made as necessary. Draft revised policies will be presented to the Local 328 executive board for review and approval.

Related Policies: None

Revision History: 2015

Responsible Office/Committee: Policy Committee, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-CD-01
Policy Title: Member Appeals
Effective Date: 01/20/21

Page 1 of 1

Purpose

To clearly define the appeal process for members of AFSCME Local 328 affected by the decision of a governing committee.

General

Any member in good standing of AFSCME Local 328 is guaranteed the right of appeal, both under this policy and under the local, council and international AFSCME constitutions. Any actions by a standing or ad hoc committee of Local 328 may be appealed.

Appeal Process

An appeal to reconsider an action or decision shall be made to the appropriate committee. After an appeal for reconsideration has been made to the appropriate committee and its response has been received, further appeal may be made to the Local 328 executive board. Upon such appeal, the executive board may form a subcommittee to investigate and report its findings to the board and to the committee whose decision or action is being appealed. The executive board will then vote on the appeal.

Should the member disagree with the decision of the executive board, the member may then appeal the decision in writing to the Oregon AFSCME Council 75 executive director.

Arbitration-Related Appeals

Appeals related to arbitration requests shall follow the process outlined in the Arbitrations policy, with appeals being made directly to the executive director of Council 75.

Related Documents: Arbitrations (EB-MS-02)

Revision History: July 2010

Responsible Office/Committee: Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-CD-02

Policy Title: Steward Representation Conflicts

Effective Date: 01/20/21

Page 1 of 1

Purpose

To identify situations where a conflict of interest exists and stewards should recuse themselves from representing a member.

Examples

Stewards should recuse themselves from representing a member if:

- The steward or coworker is involved in the investigation (e.g., the steward is being investigated or the steward brought the original complaint or concern to management or HR)
- The steward is unable to provide fair and adequate representation to the member for reasons identified by the steward

In addition to the above, stewards should consider recusing themselves from representing a member if:

- The steward or coworker is a lead worker (or other coworker) who reviews the member's work or otherwise holds some authority over the member needing representation
- The subject matter of the investigation would be personally challenging for the steward to engage in

Resolution

The steward experiencing the conflict should contact the lead steward for that day and request that the case or meeting be reassigned to another steward. If the steward is unable to contact the lead steward within a reasonable amount of time, the steward must alert the chief steward so that the member receives representation.

Related Policies: None

Related Documents: None

Revision History: July 2010

Responsible Office/Committee: Chief Steward, Executive Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-CD-03

Policy Title: Strike Vote

Effective Date: 09/16/20

Page 1 of 1

Purpose

To determine the voting parameters and threshold for strike authorization, in order to ensure participation at the level required for an effective strike.

Voting Eligibility

Only dues-paying members of AFSCME Local 328 may cast a vote in a strike-authorization vote.

Strike Authorization

In order for a strike to be considered authorized, 60% or more the dues-paying membership must have voted in the affirmative to authorize a strike. Note: This is 60% of all dues-paying members, not 60% of those voting.

Example: If Local 328 had 5,000 dues-paying members, at least 3,000 members would need to vote in the affirmative for a strike to be considered authorized. If only 2,500 members voted, even if all voted in the affirmative, a strike would not be considered authorized.

A strike authorization does not mean that a strike will automatically take place.

Related Policies: None

Revision History: 2015

Responsible Office/Committee: President, Election Chair, Bargaining Team



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-CD-04

Policy Title: Complaints Against Stewards

Effective Date: 09/16/20

Page 1 of 1

Purpose

To set forth a standard method of dealing with complaints against stewards, including the chief steward, that is consistent, fair and flexible.

Reporting

Complaints about stewards shall be directed to the chief steward. Complaints about the chief steward shall be directed to the Local 328 president. The complaint shall be in writing using the steward complaint form; summarize the issue of concern; include specific facts related to the issue (e.g., dates, times, locations, witnesses) and request a remedy.

Process

For steward complaints, the chief steward shall appoint two lead stewards and one staff advisor to the review committee. For chief steward complaints, the president or a Local 328 executive committee member designated by the president shall appoint one lead steward, two executive-board members and one staff advisor to the review committee. Committee members will assist with the review and resolution of the complaint. The complainant shall be notified by the chair within two workdays of the appointment of the review committee and shall be provided a copy of this policy.

The review committee shall complete the review and report findings and a recommended resolution to the Local 328 executive committee within 30 days of receipt of the complaint. The executive committee has the authority to adopt, modify or reject the review committee's recommendations. Within two workdays of the decision, the chair shall notify the complainant of the executive committee's decision in writing.

The complainant may appeal the executive committee's decision to the Local 328 executive board within 14 days of receipt of the written notice by notifying the president of Local 328 in writing. If the decision is appealed, the executive board shall hold a hearing at the next regular executive-board meeting to determine by a two-thirds vote whether there is cause to overturn the executive committee's decision. The board's decision must be based on a finding that the executive committee's decision was arbitrary or inconsistent.

Related Policies: None

Related Documents: Steward Complaint Form

Revision History: 2015

Responsible Office/Committee: Chief Steward, Executive Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-CD-05
Policy Title: Steward Qualifications
Effective Date: 09/16/20

Page 1 of 2

Purpose

To set forth the qualifications and requirements for each position within the Local 328 steward program.

General

Within the steward program, stewards hold different positions with different responsibilities and requiring different experience. Equivalent training and experience may be substituted for these qualifications, at the discretion of the chief steward.

Unit Steward

To become a unit steward, the individual must be a member in good standing and complete the unit steward training presented by Local 328.

Investigatory Steward

To become an investigatory steward, the individual must be a member in good standing and complete the investigatory steward training presented by Local 328.

Grievance Steward

To become a grievance steward, the individual must be a member in good standing and complete the grievance steward training presented by Local 328. Prior to becoming a grievance steward, investigatory steward training must also be completed. A minimum of six months of work as an investigatory steward is strongly recommended.

Lead Steward

To become a lead steward, the individual must be a member in good standing, be appointed by the chief steward and complete lead steward training presented by the chief steward or designee. Qualifications correspond to the lead position to be filled (see below) and include demonstrable leadership skills in that area. Minimum qualifications are:

- eZone: Investigatory steward training
- Grievance Lead: Investigatory and grievance steward training, minimum of six months as a grievance steward
- Gold Star: Investigatory steward training
- Senior Lead: Investigatory and grievance steward training, minimum of six months with the investigatory steward program
- Unit Steward Lead: Unit steward training, minimum of six months with the unit steward program

Chief Steward

To become the chief steward, the individual must be a member in good standing and be elected to the position by the union membership. It is recommended that individuals running for this position have a minimum of six months with the investigatory steward program, including experience with unit steward responsibilities, investigatory and grievance meetings and pre-dismissal and arbitration scenarios, as well as staff roles. Immediately upon election to the position, the chief steward must complete unit, investigatory, grievance and lead steward training if no previous experience exists.

Related Policies: None

Related Documents: Steward Program Position Descriptions

Revision History: None

Responsible Office/Committee: Chief Steward, Executive Board



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-MS-01
Policy Title: Union Records
Effective Date: 09/16/20

Page 1 of 1

Purpose

To ensure that all AFSCME Local 328 records are preserved and that financial reports and executive-board minutes shall be open to review by members upon reasonable notice.

General

The secretary is the official keeper of union documents and records.

Minutes & Financial Records

All financial reports and minutes shall be in compliance with the AFSCME International financial code. Financial reports shall be kept for 10 years. Executive-committee and executive-board minutes shall be circulated to the board prior to the next board meeting. Upon approval by the board, board meeting minutes shall be posted on the Local 328 website.

Other Records

Other records maintained by the union include copies of contracts, correspondence, email-vote results, and policies.

Member Requests

Costs associated with providing a member with requested union information shall be the responsibility of the member.

Related Documents: None

Revision History: April 2011, July 2010

Responsible Office/Committee: Secretary

Policy Number: MM-MS-02

Policy Title: Hardship Fund Eligibility

Effective Date: 05/15/20

Page 1 of 2

Purpose

To establish eligibility criteria for the hardship fund to assist AFSCME-represented employees experiencing housing, transportation or food insecurity, which was established by the 2019 – 2022 OHSU-AFSCME Local 328 collective-bargaining agreement. (See MOU #10 for details.)

Contractual Restrictions

Per MOU #10, the hardship fund will not be used to (a) supplement across-the-board wages for the bargaining unit or (b) replace income lost by a bargaining-unit member as a result of discipline.

Eligibility

To qualify for assistance from the Local 328 hardship fund:

- The employee has been out of work for at least two weeks, or
- The employee has had their work hours reduced for at least 30 days and will returning to regular hours within six months, or
- The employee is regularly employed, but experienced short-term (less than six months) unemployment within the previous 90 days.

If the employee does not meet any of the above basic criteria, they may qualify for assistance due to temporary financial hardship caused by one of the following special conditions:

- Medical issues that leave the employee off work (unpaid) for two or more weeks.
- Natural disaster (e.g., fire, earthquake, flood).
- Unpaid child support of at least one month, if the employee has contacted the district attorney and wage garnishment or other financial remedy is pending.
- Death in the immediate family that results in two or more weeks off work beyond standard bereavement leave. (This fund does not cover funeral costs or travel.)
- Domestic violence.
- Other significant events as agreed upon on a case-by-case basis by the Local 328 executive committee.

Eligibility under one of the above special conditions will be determined by the Local 328 executive committee or its designee.

Employees experiencing financial hardship due to the following circumstances are not eligible for assistance from this fund:

- Long-term (greater than six months), seasonal or chronic unemployment
- Inability to pay bills with one's regular income, whether part time or full time, due to "falling behind" (rather than due to any specific justifiable circumstances)
- Wage garnishment of any kind, including for child support
- Long-term unpaid child support with no remedy
- Certain legal matters

Referral

Employees who wish to receive assistance from this fund may request a referral as per the Hardship Fund Referral Form.

Duration

Assistance to employees will cease to be available once the monies in the hardship fund have been spent down.

Related Policies: None

Related Documents: 2019 – 2022 CBA MOU #10 Hardship Fund, Hardship Fund Referral Form

Revision History: 04/16/20

Responsible Office/Committee: Hardship Committee, Executive Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-MS-03

Policy Title: Complaints Against Member Leaders

Effective Date: 09/16/20

Page 1 of 1

Purpose

To set forth a standard method of dealing with complaints against member leaders that is consistent, fair and flexible.

Reporting

Complaints regarding member leaders shall be directed to the Local 328 president. Complaints regarding the president shall be directed to the vice president. The complaint shall be in writing using the member leader complaint form; summarize the issue of concern; include specific facts related to the issue (e.g., dates, times, locations, witnesses) and request a remedy.

Process

For complaints about the president, the vice president (or Local 328 executive committee member designated by the vice president) shall appoint three executive-board members and one staff advisor to the review committee. For all other complaints, the president or designee shall appoint two executive board members and one staff advisor to the review committee. The committee members will assist with the review and resolution of the complaint. The complainant shall be notified by the chair within two workdays of the appointment of the review committee and shall be provided a copy of this policy.

The review committee shall complete the review and report findings and a recommended resolution to the Local 328 executive committee within 30 days of receipt of the complaint. The executive committee has the authority to adopt, modify or reject the review committee's recommendations. Within two workdays of the decision, the chair shall notify the complainant of the executive committee's decision in writing.

The complainant may appeal the executive committee's decision to the Local 328 executive board within 14 days of receipt of the written notice by notifying the president of Local 328 in writing. If the decision is appealed, the executive board shall hold a hearing at the next regular executive board meeting to determine by a two-thirds vote whether there is cause to overturn the executive committee's decision. The executive board's decision must be based on a finding that the executive committee's decision was arbitrary or inconsistent.

Related Policies: None

Related Documents: Member Leader Complaint Form

Revision History: None

Responsible Office/Committee: Chief Steward, Executive Committee



AFSCME LOCAL 328 POLICY MANUAL

Policy Number: MM-MS-04
Policy Title: Complaints Against Staff
Effective Date: 09/16/20

Page 1 of 1

Purpose

To set forth a standard method of dealing with complaints against staff members that is consistent, fair and flexible.

Reporting

Complaints regarding staff members shall be directed to the Local 328 president. The complaint shall be in writing using the appropriate form based on the complainant (member leader or represented employee). The form will summarize the issue of concern and include specific facts related to the issue (e.g., dates, times, locations, witnesses). Member leaders must provide evidence of measures taken to resolve the issue with the individual staff member for the form to be considered complete. If directly addressing the concern with the staff member could create a safety risk, this requirement will be waived.

Process

All complaints are submitted to the Local 328 president for review and investigation. The complainant and the complainees shall be notified by the president within five workdays of the investigation timeline and shall be provided a copy of this policy.

Based on the president's findings, the complaint may also be submitted to the Council 75 staff supervisor. The collective recommendations will be presented to the Local 328 executive committee for review. The executive committee has the authority to adopt, modify or reject the recommendations. Within two workdays of the decision, the president shall notify the complainant and complainees of the executive committee's decision in writing.

The complainant or complainees may appeal the executive committee's decision to the Local 328 executive board within 14 days of receipt of the written notice by notifying the president in writing. If the decision is appealed, the executive board shall hold a hearing at the next regular executive-board meeting to determine by a two-thirds vote whether there is cause to overturn the executive committee's decision. The board's decision must be based on a finding that the executive committee's decision was arbitrary or inconsistent.

Related Policies: None

Related Documents: Staff Complaint Form - Member Leaders, Staff Complaint Form - Represented Employees

Revision History: None

Responsible Office/Committee: President, Executive Committee