MANUAL FOR
LODGE RECORDING
SECRETARIES

For Lodges in the
United States
The Recording Secretary holds a key position in a lodge. He or she has the responsibility for keeping channels of communications open and maintaining a workable system of record keeping and official correspondence. These functions are vital to the successful operation of the lodge. The Recording Secretary must work in close cooperation with the lodge President and with all other local lodge officers.

While the IAM Constitution spells out the specific duties of the Recording Secretary, this manual, used as a supplement, reviews the procedures and recommended practices in connection with current operations within the IAM. In cases where this manual conflicts with the IAM Constitution, the IAM Constitution will govern.

This manual is a useful addition to the IAM Officers’ Guide and the Financial Officers’ Reference Manual, which assist each lodge officer to carry out his or her duties in close cooperation with fellow officers.

In Solidarity,

Robert Martinez, Jr.
INTERNATIONAL PRESIDENT

Dora Cervantes
GENERAL SECRETARY-TREASURER
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This manual is for Recording Secretaries of Local Lodges in the United States. Refer to the Recording Secretary Manual for Local Lodges in Canada for election and other information specific to Canadian law.
Constitutional Duties

The Recording Secretary’s duties as defined in Article C, Section 3 of the IAM Constitution are to:

1. Conduct correspondence for and in the name of the local lodge.
2. Present all communications and bills to the local lodge and deliver such bills to and for the files of the Secretary-Treasurer.
3. Draw all orders (vouchers) on the Secretary-Treasurer when passed by the local lodge and attest the same by properly signing and attaching the seal of the local lodge thereto.
4. Prepare and sign all credentials of delegates and alternate delegates to Conventions of the Grand Lodge and forward duplicates thereof to the General Secretary-Treasurer.
5. Keep minutes of the local lodge meetings and Executive Board meetings, retain custody of the official lodge seal and perform such other duties as are required in the IAM Constitution.

AN ACCURATE RECORD
Specific Duties at Meetings

The Recording Secretary has an important role to play at local lodge meetings and should therefore be prepared in advance to perform such duties as the following:

1. Call the roll of officers.
2. Keep accurate minutes of the current meeting.
3. Read minutes of the last meeting in a clear and distinct manner. To be easily heard, it may be advisable to stand.
4. Assist the President in following carefully the regular order of business as prescribed in the Constitution (Art. D. Sec. 5). The IAM’s Handy Guide to a Well Conducted Union Meeting can be a very useful reminder for the Recording Secretary as well as for the other officers.
5. Present communications and bills.
6. Supply information and remind the President of any unfinished business.
7. Supply items from correspondence for action under new business.
8. Collect for filing the written reports submitted by committees.
9. At all times work in close cooperation with the meeting chairperson who is responsible for conducting a successful meeting.
10. Chair a meeting long enough for a temporary chairperson to be selected in the event of the resignation or absence of both the President and Vice President.
11. Maintain a list of standing committees which are currently in existence. When a committee is appointed, the names of the committee members and all relevant information should be handed to the committee chairperson.
12. Maintain a “meeting attendance book” in lodges whose bylaws provide that in order to qualify as a lodge officer or delegate, a member must attend a certain percentage of meetings during the 12-month period ending on the date of close of nominations.

If the Recording Secretary is absent from the meeting, the Chair should appoint another member to serve for that meeting. Minutes must be signed by the person taking them.

Financial Responsibilities

The Recording Secretary is significantly involved in the financial aspects of lodge operations in the following ways:

1. All officers who receive bills should forward them to the Recording Secretary so that they will be presented at the proper time during a lodge meeting. All bills must be presented and read at the meeting. The minutes must also show the amount of the bills, to whom they are paid and whether they have been approved or disapproved by the members. If there is any question regarding a bill, the Recording Secretary should be prepared to give a full explanation. Members must be kept fully informed about lodge finances so that intelligent decisions can be made.
2. **Bills should include all lodge expenditures.** Recurrent bills, such as per capita taxes, rent, withholding taxes and salaries that have been previously authorized by the IAM Constitution or bylaws must be presented for the members’ information and be recorded in the minutes, even though they do not need to be approved again. As a keeper of the minutes, the Recording Secretary is in charge of the record showing the approval by members of lodge expenditures and is, therefore, the only office authorized to initiate the movement of funds from the treasury.

3. **When the members have approved payment of a bill, the Recording Secretary must sign a master voucher and place the seal of the lodge on it.** A master voucher is available from the General Secretary-Treasurer’s Department which saves time in writing vouchers. Any vouchers written that are not authorized by minutes are in violation of the IAM Constitution and the Labor-Management Reporting and Disclosure Act in the United States.

4. **Vouchers must be made out and addressed to the Secretary-Treasurer and contain enough information to enable a check to be issued.** A sample voucher is shown at right.
International Association of Machinists and Aerospace Workers

To: Sarah Smith
Secretary-Treasurer

Lodge No. 3456
Date 01/15/20XX
Voucher No. 123

This Voucher Must Be Kept on File by the Secretary-Treasurer as a Record of His or Her Authority to Issue the Following Listed Checks.

IN ACCORDANCE WITH A VOTE OF THIS LODGE YOU ARE HEREBY AUTHORIZED TO PAY TO

<table>
<thead>
<tr>
<th>Check No.</th>
<th>Payee</th>
<th>In Payment Of</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1351</td>
<td>Union Realty</td>
<td>Union Hall rent</td>
<td>$450.00</td>
</tr>
<tr>
<td>1352</td>
<td>Janet Jones</td>
<td>Registration fee - Women's Conference</td>
<td>$75.00</td>
</tr>
<tr>
<td>1353</td>
<td>Craftsman Printers</td>
<td>Print Local Lodge Newsletter</td>
<td>$850.00</td>
</tr>
</tbody>
</table>

$1,375.00

Must be signed by Lodge President
President

Must be signed by Lodge Recording Secretary
Recording Secretary

Original to S.-T.
Yellow to R.S.

The Constitution Requires All Vouchers To Be Paid By Check

Master voucher forms are available from the IAM Purchasing Department (301) 967-4712.
Role in Trial Notification

As the official correspondent for the lodge, the Recording Secretary has several responsibilities in connection with trials arising out of charges of misconduct as governed by the provisions of Article L in the Constitution.

- It is the responsibility of the Recording Secretary to notify both the plaintiff and defendant of the decision of the local lodge after a trial case. (See Art. L, Sec. 10 of the IAM Constitution.)

The notification must:

(a) be in writing;
(b) be sent by registered or certified mail; and
(c) clearly state the penalty imposed, if the local lodge took such action.

- The proper notification must be sent out immediately to comply with both the IAM Constitution and U.S. Federal Law.

The IAM Constitution states that the decision of the local lodge may be appealed to the International President within thirty days after the verdict of the local lodge is given.

If proper notification is not sent out promptly, the appeal process will be delayed.

- Copies of all charges should be sent routinely to the International President.

The International President, when kept advised from the very beginning, will be in a position to render a prompt decision based on complete information if the matter is appealed.

Role in Lodge Elections

The Recording Secretary’s duties in local lodge elections are to:

1. Review all the Circular Letters from the Grand Lodge which are relevant to election procedures, including the IAMAW Official Policy Regarding Local Lodge Elections. These will provide detailed information on the procedures to be followed in carrying out the provisions of Articles B, C and Article II, Sec. 3 and 4 of the IAM Constitution as well as U.S. Federal Law. (Copies of election-related Circulars are included in the Appendix. Check with Grand Lodge or on VLodge.net to ensure you have the latest versions of these Official Circulars).

2. Notify all members not less than 60 days before the date when the elections are to be held. In the United States, the election notice (by means of letter or by authorized publication or by other dependable regularly-used means of communication) must be mailed to the last known address of each member qualified to vote. The notice must specify the date, time and place of nominations for the election and the date, time and place of balloting for an election. The notice must say what time the polls will be open; specify voter eligibility rules; inform members of procedures for obtaining absentee ballots and must include an application for an absentee ballot. This means, for example, that a simple posting of the notice on a bulletin board is not sufficient. However, this requirement regarding election notice by mail does not apply in Canada.

3. As part of the election notice, provide to all members by written communication specific information about who is entitled to receive an absentee ballot and
include an application for an absentee ballot (see Article XXII, Sec. 7 for district lodge elections and Article B, Sec. 4 for local lodge elections). Those who are entitled to vote by absentee ballot are:

(a) Members who reside in outlying districts more than 25 miles from the designated balloting place.
(b) Members who are confined because of verified illness or on leave qualifying under U.S. and/or Canadian family leave laws.
(c) Members who are on vacation.
(d) Members who are on official business approved by the local, district or Grand Lodge.
(e) Members who are on an employer travel assignment.
(f) Members who are on reserve military leave.

4. Get the ballots printed. This should be done as far in advance as possible. Make sure that the place and date for the nomination and election meetings are set early so that notification can be sent to the members at least 60 days prior to the date the election meeting is scheduled as required by the IAM Constitution and the Labor-Management Disclosure Act (in the United States).

5. Send out absentee ballots. Any member entitled to receive an absentee ballot must make a written request, stating a reason outlined above, to the Recording Secretary by delivering in person or by official government mail. All absentee ballot requests for local lodge elections must be made at least 30 days prior to the election. Within five (5) days of the close of nominations or as soon thereafter as the ballots are available, the Recording Secretary and the Secretary-Treasurer must mail the ballot if the records of the local lodge indicate that the applicant is eligible to vote in the election. The ballot must be sent to the applicant by mail and not delivered in any other fashion.

If the Recording Secretary and the Secretary-Treasurer determine that the member is ineligible for an absentee ballot, the member will be so notified in writing that the request for an absentee ballot has been denied and the reason for that determination. All such denials must be mailed within ten days (10) of the receipt of the absentee ballot request.

6. Record time of receipt of each absentee ballot. All absentee ballots must be returned by official government mail to the Recording Secretary and must be received by or before the closing time of the polls. They must be turned over to the tellers or inspectors of the election unopened.

7. Publish the results of the election. A tally sheet filled in and signed by the tellers must be turned over to the Recording Secretary. (In the case of Grand Lodge elections the tally sheet signed by the inspectors of election goes to the General Secretary-Treasurer with a copy to the lodge Recording Secretary.) These results must be included in the records of the lodge in such a manner that they may be published separately for each office.

8. Retain the ballots. The ballots and all other records pertaining to the election must be preserved for one year.

In modification of the foregoing, depending upon structure or bylaws, a district corresponding officer may rightfully perform the duties in connection with local lodge elections normally performed by the local lodge Recording Secretary.
Role in Strike Sanction Requests

The Recording Secretary needs to be knowledgeable of all Constitutional provisions and other established procedures relating to strike action by a lodge. Along with all lodge officers, he or she should be acquainted with policies on strikes set forth in the Official Circulars and with the guidelines provided in the IAM Strike Manual. A Recording Secretary is specifically involved in the following:

- **The Recording Secretary is responsible for applying for strike sanction.** He or she provides the information confirming that all IAM policies and procedures regarding strikes have been followed. If a strike vote has been taken at a meeting where at least 30% of those affected by the dispute are present, and if the motion to strike is carried by a two-thirds majority of those present and qualified to vote, the Recording Secretary shall prepare a full statement and history of the matters in controversy as required on the official Report of Strike or Lockout form (available on V.Lodge.net) and forward it to the International President.

- **The local lodge, through the Territorial General Vice President, will then be notified by the International President of the Executive Council’s decision regarding strike sanction.** No strike may be declared by any local lodge without the consent of the International President and the Executive Council.

In modification of the above, the Constitution provides that where agreements are handled through a District Lodge, all forms and reports required in connection with strikes may be signed and transmitted by the District Lodge officers involved.

Role in Relation to Bylaws

Bylaws are the “constitution” of the local lodge and must be approved by the International President in accordance with Article D of the Constitution. The Recording Secretary must be concerned with the following requirements relating to bylaws:

1. **All correspondence referring to bylaws must be addressed to the International President and clearly marked c/o Bylaws Department.** The International President is the only person who has the authority to approve bylaws or amendments. The local lodge seal and the Recording Secretary’s signature must be attached to all correspondence concerning bylaws and amendments.

2. **A set of model bylaws for local lodges is available on request from the International President or on V.Lodge.net.** This document should always be obtained and used as a guide in drafting any initial bylaws for a lodge. It should also be consulted and followed whenever any substantial revisions to a lodge’s bylaws are contemplated.

3. **Local lodge bylaws are subject to the provisions of the IAM Constitution and the bylaws of the District Lodge, if any, to which it is affiliated.** The local lodge bylaws committee should, therefore, carefully read and consider these documents when drafting proposals, in order that no conflicting clauses are submitted.

4. **Bylaws which have been approved by lodge members must be submitted in triplicate to the International President.** The covering letter accompanying the proposals should state that the bylaws have been approved by the local lodge membership noting the dates of action, in accordance with the amendment procedure.
5. **Copies of amendments to existing bylaws must be sent in triplicate to the International President and clearly marked c/o Bylaws Department.** The actual master copy (not a photo copy) of the lodge’s bylaws which bears the IAM Headquarters stamp of approval must be enclosed with the proposed changes. No proposals or amendments will be considered until the master copy is received. There should be no notations or other defacements on this master copy. Only those sections of the bylaws which have been amended should be submitted for approval. The changes which are approved will then be incorporated directly into the master copy and the revised document will be returned to the lodge.

6. **Special attention should be given to local and district bylaw changes regarding the salaries of Directing Business Representatives, President-General Chairpersons, Business Representatives, General Chairpersons, Organizers and Full-Time Officers.** The normal procedure for making amendments must be followed if any changes in salaries are introduced which require figures in the bylaws to be changed. This includes increases which accrue as a result of wage increases negotiated. For example, if the members receive a 5% increase and the bylaws state that the Business Representative gets the same increase, the 5% must be added to the Business Representative’s monthly salary rate in the bylaws. When this has been approved by the International President’s office, authorization will be given to the General Secretary-Treasurer to increase the IAM contribution accordingly, and ensure that proper pension payments are credited. **

If the salary rate is set up in increments in exact monetary amounts at specified times, no bylaw changes are necessary and no master copy has to be forwarded. For example, the Business Representative might have a starting salary of $1,000 per month which would be increased, by the amount of $100 per month at the end of each 12 months’ service, to the level of twice the maximum support for Business Representatives’ salaries as provided by the Grand Lodge Constitution. In all cases, whether salaries are established for Business Representatives in exact monetary amounts in bylaws or are based on a set formula for increases, a letter must be forwarded to the International President with the seal and the signature of the official corresponding officer affixed. It must include the Business Representative’s name, current rate of pay and the proposed rate of pay in monetary terms, with the effective date of such increase.

**Preparing Credentials**

It is the Recording Secretary’s job to prepare credentials for delegates and alternates to State and Provincial Council meetings, District Conventions, Grand Lodge Conventions and AFL-CIO and CLC Conventions. Many important conventions and meetings provide official credentials forms which a Recording Secretary is required to fill out. Where such forms are not provided, a statement such as the following may be prepared: “This will certify that Brother John Doe, Card No. 654321, is the duly authorized delegate of Lodge 2345 to the New York State Machinists’ Conference.” Signature and lodge seal must be affixed.
Other Responsibilities

The above duties give an accurate general description of the job of the Recording Secretary. The specific duties mentioned, however, are only the bare necessities of the job itself. There are many additional responsibilities which are customarily associated with this position. Some of the more important of these responsibilities are:

1. To provide local lodge leadership and guidance as part of the team which includes all local lodge officers. As the person through whom all official activities of the lodge are channeled, the Recording Secretary is in a position to keep the Communicator, Educator, committee members and lodge delegates informed and to assist them in their assigned tasks.

2. To attend all Executive Board meetings and present the communications that have been received; to help decide how they will be presented by local lodge officers in making recommendations to the members; to record a roll call of those present and to keep minutes of all Executive Board meetings which become part of the permanent records of the lodge.

3. To write letters as directed by the local lodge officers, membership and lodge committees.

4. To keep readily available files of minutes, correspondence, reports and grievances. The Recording Secretary should assist all committee chairpersons in keeping orderly files of the documents and literature which relate to their responsibilities.

5. The Recording Secretary should keep the local lodge mailing list up to date. The Recording Secretary should work closely with the local Secretary-Treasurer to update membership addresses in your local’s VLodge Membership (VLM) recordkeeping software. Address changes entered into the VLM system and sent to Headquarters in the monthly report will be automatically updated in Grand Lodge records. Locals not on the VLM system should notify the General Secretary-Treasurer’s office of any known address changes.
Writing Minutes

The Recording Secretary is responsible for the handling and writing of the minutes of Executive Board, regular and special lodge meetings. They are the only source of reference as to what has been done and they also serve as a reminder of future action to be taken. Minutes of a lodge are the only permanent record of the activities and official actions of the lodge. The following suggestions should be followed when writing minutes:

1. **Show clearly in the minutes what business was brought up at the meeting and what action the members did or did not take.** Each order of business should be recorded in the minutes. Where no action was taken, the word “None” should appear. Remember that minutes should be a record of what was done and not what was said. Under no circumstances should the Recording Secretary comment in the minutes either favorably or otherwise on anything said or done at the meeting.

2. **Record each motion as stated by the Chairperson.** The exact wording of each motion must be written down and the Recording Secretary should be asked to read the motion before the vote. If the Chairperson rewords a motion to clarify it, that is the way the motion is recorded in the minutes. A motion that has been withdrawn should not be recorded. All resolutions that have been adopted must be entered in the minutes in full.
3. **Record the wording of the motion and the action taken on it.** Every motion that is voted on must be written out in the minutes, indicating whether it was passed or not. If the voting on a motion is counted (ballot, roll call or count of hands), the minutes should show the exact count. Action taken by the local “by unanimous consent” should also be noted.

4. **Record the names of members making or seconding all motions.** It is advisable to do this for future reference, especially if a correction is called for at the next meeting.

5. **Take the roll call of officers and note the number of members present** when there is not a quorum. The minutes must show if a meeting was not held due to the lack of a quorum.

6. **Use as few words as possible when writing the minutes** but include enough detail so that the members who missed the meeting will understand what took place. Emphasize what was done and decided at the meeting, not what was said. Record the details of speeches, reports, or discussions only when it is felt that they are important for future reference.

7. **Attach to, or file with, the minutes, and so note in the record, any document** which was presented to the meeting and which might need to be referred to in its entirety. Examples are: written reports of lodge committees, text of the remarks of a speaker, and prepared statements which members may ask to have made part of the record.

8. **Briefly summarize the reports and recommendations of lodge committees** and delegates. Show what action was taken on reports, if any.

9. **Take careful notes during the meeting as each item on the agenda is handled.** This will be easier if you have a copy of the “Order of Business” from the IAM Constitution. “The Handy Guide to a Well Conducted Union Meeting” is also a useful reference.

10. **Write up a draft of the minutes while the meeting is still fresh in your mind.** Make a new paragraph for each subject and each order of business.

11. **Record the final minutes of Executive Board, regular and special lodge meetings** in an approved minute book that is available from the Purchasing Department at IAM Headquarters (301) 967-4712.

### Correcting the Minutes

A correction or addition to the minutes should be written in full on the last page of the minutes which require changing. All corrections must be initialed. Minutes may be approved and corrected only by the body whose record they are. For example, the Executive Board must approve and correct its own minutes. A motion to correct the minutes may be either for a deletion or an addition. The minutes may be corrected whenever an error is noticed regardless of the time that has elapsed; but after their adoption they require a two-thirds vote for their amendment.

### Taking The Minutes When the Recording Secretary Is Absent

If the Recording Secretary is absent from a meeting the minutes should state, for example: “The Recording Secretary being absent, Robert Smith was appointed Recording Secretary pro tem. The minutes were read and approved.” If the minutes were not available, state: “The reading of the minutes was dispensed with.” The minutes must be signed by the person who was appointed to serve as Recording Secretary for that meeting.
MINUTES
Lodge 6011, International Association of Machinists
Membership Meeting, March 10, 20XX

The regular meeting of Lodge 6011 was called to order at 8:05 p.m. in the union hall by President Romano and opened in due form.

On the roll call of officers, all were present except Vice President Mary Timmons.

Applications: The Committee reported applications from William Hunt, Joseph Novick and Barbara Johnson, and recommended acceptance. A motion by Barry, seconded by Raul, to accept the applications was passed, President Romano gave them the IAM Obligation.

Minutes: The minutes of the last meeting were read and approved.

Visitors: The lodge welcomed Josephine Manning from Lodge 7235.

Financial Report: The Secretary-Treasurer reported that the balance on hand at the close of the last meeting was $39,243.15 with receipts of $16,600.00 and disbursements of $13,300.00, leaving a present balance of $42,543.15.

Communications: The Secretary read a letter from the Central Labor Council asking support for the IAM members on strike at Jackson Machine Works. On motion by Strickland, seconded by Toland, the lodge voted to donate $50 and to encourage volunteers to join a picket line.

Bills: The following regular bills were read: per-capita to District, $1,690; per-capita to Grand Lodge, $2,940; Bay Phone Company, $409.11; rent of hall, $400. New bills were presented and approved as follows, John Romano (lost time, $35.40), Sally Polk (lost time, $67.50), Marlo’s Bakery ($8.90).

Reports: Business Representative Jamison reported on the strike at Miller Motor Company and the upgrading grievance in the Machine Shop. The Education Committee Chairperson reported on a letter regarding Machinists Leadership Schools this summer. A motion by Higgins, seconded by Jones was passed to send two members to the William W. Winpisinger Education and Technology Center in May with lost time and expenses.

Delegate James Glover reported on the last meeting of the District, and urged members to send postcards to Senators on Senate bill 671.

The Executive Board report was given by Recording Secretary Perez. It was recommended that the lodge register a Human Rights Chairperson with the Grand Lodge Women’s and Human Rights Department. Motion by Recording Secretary Perez, seconded by Jones to concur with the recommendation of the Executive Board. Motion passed.

Report on Organizing Activities: Organizing Committee Chairperson Susan Sands reported on the organizing campaign at XYZ Company and asked for volunteers for housecalling next month.

Good and Welfare: None.

Unfinished business: Jones moved, seconded by Hernandez, that the lodge buy the new computer reported on at the last meeting, for $1,700. Motion passed.

New business: On motion by Marlin, seconded by Higgins, the Lodge voted to set up a Community Services Committee, to be appointed by the President.

A motion was made by Rogers, seconded by Glover, to take part in Career Day at Highland High School. An amendment by Marlow, seconded by Jennings, to pay lost time to two lodge officers for this day passed. Motion as amended was passed.

Sick and Disabled Members and Relief Committee: None

Members Out of Work and Positions Vacant: None

The meeting adjourned at 9:15 p.m.

Respectfully submitted,

Jerry Stokes
Recording Secretary

Minutes should be recorded in approved minutes books available from the IAM Purchasing Department (301) 967-4712.
Recording Secretaries should use this guide at all lodge meetings. In situations where members are unfamiliar with meeting procedures, the Recording Secretary should discuss with the President whether to order extra copies of this guide for members to use during meetings. By having a copy of the guide, members can follow the “plan” of the meeting and know when various types of motions and other floor actions are in order.
Correspondence

Handling Correspondence

Most letters directed to the local lodge are sent to the Recording Secretary. Since these letters are for the information of all officers and membership, the following procedures should be followed:

1. **Open letters when received.** An unopened letter might cause the local to miss out on some essential activity which takes place before the next local meeting and which could be authorized by the Executive Board.

   Suppose a local in the United States meets monthly and has just held its meeting. A letter is received from the State AFL-CIO asking the local to write, fax, e-mail or send a delegation to the State Capital to lobby on an amendment to the Unemployment Insurance Bill coming up in two weeks. Unless the letter is opened promptly and the matter raised with the Executive Board or President, the local’s voice will not be heard on a matter of importance to its members.

2. **Route letters to the proper person.**
   Letters should not be left unread, waiting for the next membership meeting. The officers, particularly the President, should be informed about all important correspondence when it is received. When a letter deals with a subject that is the responsibility of a committee, a copy of that letter could be passed on to the Committee Chairperson.

   For example, suppose the Secretary receives a letter announcing a new pamphlet for use in getting members registered to vote, this should go to the MNPL Committee Chairperson. The Chairperson can report on the letter at the meeting, along with a recommendation by the committee for action on it. This is a more efficient and more interesting way of handling letters than having the Recording Secretary read them all at the meeting.

   When a letter is turned over to a committee, the date it was received and when it was handed over should be noted, and this should be reported to the Executive Board. Copies of letters which have been referred to a committee should be retained in the Recording Secretary’s files so that they can be reported on at local lodge and Executive Board meetings.

3. **Acknowledge letters that cannot be answered right away.** Acknowledgment of letters is important, especially when there is to be some delay before the local can meet and take action. This can be accomplished with a letter which simply reads: “Your letter of (date) has been received. The matter will be considered at our meeting of (date) and you will be notified of the action taken.” By doing this, your local gets a reputation for efficiency.
4. **Prepare the correspondence to be read at the meeting.** Before each meeting, the officers should go over the letters so that they know what is coming up. A good time to do this is at the officers’ meeting or Executive Board meeting which should plan an agenda for the meeting in keeping with the IAM Order of Business for local lodge meetings. At this time the correspondence can be put into some logical order so that letters relating to the same or similar issues can be presented together.

The Executive Board normally makes recommendations for action on important letters. These recommendations are a guide for the membership, although the members make the final decision.

5. **Handle letters efficiently at the meeting.** Every letter of any importance should be mentioned to the membership. This protects their right to know everything that concerns the lodge.

   All official Circular Letters from Grand Lodge Officers should be read in their entirety, because they concern matters about which all members should be fully informed.

6. **It is not necessary to read every letter word for word.** Correspondence can become a dreary bore for the membership unless common sense is used. Many letters can be summarized in a sentence or two. If letters are not read in full, they should be available on request for interested members to read after the meeting has adjourned.

   For example, the Recording Secretary might say: “We have received a notice about the City of Hope program to be held at the Community Center, Broad and Main Streets, 7:30 p.m., July 9.” The Chairperson then says: “No action is necessary. If there is no objection, this notice will be posted on the bulletin board.” Or as another example, the Recording Secretary might say: “This letter announces the monthly meeting of the State IAM Council on February 25. I will read the last paragraph of the letter which deals with the threat of a ‘right-to-work’ bill in our state.” After reading from the letter, the Chairperson might then say: “What action do you wish to take on this meeting?”

   This form of presentation brings out the main items quickly and clearly and points to the action which the local is being asked to take. It is useful, not only for lengthy or trivial matters, but also for subjects which are so important that only the digest form will ensure the attention and clarity necessary to get intelligent action.

7. **However, when a member asks for a letter to be read in full, it must be read.** It is also quite proper for the membership to take action on a letter at the time it is read. Often this will save time. In some lodges it is customary for action on a letter to be postponed to “new business,” but this is not necessary. It is a good rule to act on most letters right away. Postpone only those letters which involve a complicated or controversial discussion.
Writing Letters

The Recording Secretary is the official correspondent of the lodge.

The Recording Secretary must answer letters as directed by the lodge. Before writing a letter, he or she must decide what needs to be said. Often it takes thought to understand the situation clearly enough to get ideas organized. This is the first step. Above all, the letter should be simple and the following points kept in mind:

1. Refer to the date or reference number of the letter being answered.

2. State the subject of the letter and the purpose for writing it in the first paragraph. If writing about more than one subject, state each separately.

3. Explain the important facts or information. Remember that the person who will get the letter is not familiar with the problem or the lodge and needs the necessary facts.

4. Use common, everyday language and short sentences. This will make your meaning clear.

5. Include the Recording Secretary’s name and title, together with the lodge number and the address to which a reply may be sent. Affixing the lodge seal to a letter gives it official status.

6. When writing for information, be specific. Make the request simple and to the point. In addition, make sure that all the information needed is being asked for.

7. Send copies of lodge correspondence to all persons who should be kept informed. Usually this means sending copies to the General Vice President and to the appropriate Business Representative, General Chairman or servicing Grand Lodge Representative.

8. Keep copies of all lodge correspondence on file for future reference and local lodge records.

9. Use the lodge seal on all official correspondence and only on such correspondence. The Recording Secretary is the only person in the lodge authorized to be in possession of the seal (Art. D, Sec. 6).
January 15, 20XX

Subj: IAM Retirees Program

Dear Sir and Brother:

Thank you for your cooperation in this matter.

In Solidarity,

John Jones
Recording Secretary

cc: General Vice President
Writing Within the IAM

When writing to Grand Lodge officers or to others within the IAM, keep the following points in mind:

- Stick to one subject in a letter and state it in the upper right hand corner under the date. This makes it easier to refer the letter to the appropriate department or person responsible for the particular subject.

- If you are replying to a letter carrying a file number (as is the case of most correspondence from Grand Lodge officers), place such number also in the upper right hand corner.

- Always include your name and title, the lodge number, seal and the address to which you want the reply sent.

- When corresponding with the Grand Lodge, copies of such correspondence should be sent to your respective General Vice President.

Corresponding With IAM Headquarters Departments

All correspondence to IAM Headquarters should be addressed to:

Name of person or department
International Association of Machinists and Aerospace Workers
9000 Machinists Place
Upper Marlboro MD 20772-2687

The following are brief general descriptions of the special services offered by the departments at IAM Headquarters. For more detailed information, visit the “Departments of the IAM” section of the IAM Headquarters website (www.goiam.org) or VLodge.net. VLodge.net (www.Vlodge.net) is a service provided by Grand Lodge that provides information about what’s happening in your local, district and territory; has an area for model contract language; has resources for your financial officer; has Official Circulars and has information on services available from the departments at Grand Lodge. Because of the sensitive nature of the information available on VLodge.net, access is limited to only certain local lodge officers. Contact VLodge support at 301-967-3481 for information.

Only Lodges that have filed their yearly report of officers to the IAM Roster Department will be granted access to VLodge.net. As Recording Secretary, it is your responsibility to ensure that report is filed.
Departments of the General Secretary-Treasurer

**Accounting**

The Accounting Department keeps track of all of the receipts and disbursements of Grand Lodge funds, including accounts receivable, accounts payable, preparing financial statements and handling payroll. The Accounting Department can provide information about your local lodge’s monthly review statement, including information on the status of any checks written to Grand Lodge or credited to your account, any charges to your account or your local’s account balance.

**Information Systems**

The Information Systems (IT) Department is responsible for implementing the IAM’s technology architecture. The Department handles the organization’s hardware and software needs; manages its network structure and security as well as the internal communications system at Grand Lodge. A significant role of the IT Department is the development and support of the software applications specific to the needs of the organization’s mission. Applications such as V Lodge Membership (VLM), V Lodge.net, Virtual Finance Office (VFO) and Organize provide staff and officers the tools needed to fulfill their responsibility in servicing the membership. For information on the IAM’s technology or applications, contact support@vlodge.net or 301-967-4782.

**Membership Records**

The Membership Records Department processes the monthly local lodge membership and per capita reports. In addition, the Department provides first-level support to V Lodge Membership (VLM) users in the field, and assists some lodges with the collection and distribution of dues.

The Department also handles several other important functions such as administering the distribution of strike payments and death benefits, maintaining the roster of local and district lodge officers as well as the addresses for all active members, and handling requests for local lodge mailing labels and membership lists. Another significant service provided by the Department is the issuance of veteran service awards, retirement, exempt and lifetime membership cards.

**Purchasing**

Local and district lodges can purchase supplies, such as the IAM Constitution, voucher forms, minute books, membership applications, retirement and withdrawal cards, new member kits, etc., from the Purchasing Department. Order Forms are available by calling 301-967-4712 (fax: 301-967-3428).
Communications Department

The Recording Secretary is frequently called upon to send information to the IAM Communications Department. The Communications Department is the home of the IAM Journal, the IAM’s national magazine; the IAM’s web site (www.goiam.org); the Machinists News Network that features IAM-produced videos; iMail, a twice-weekly electronic newsletter; the Have You Heard bulletins for lodge Communicators; and maintains the IAM social media sites on Facebook and Twitter.

The IAM Journal always welcomes news and feature stories from IAM local and district lodges. Recording Secretaries can forward information, including photos, on strikes, contract settlements, grievance wins, community services events, and human interest stories about members and their families. The IAM Journal, however, is a national magazine with limited space. Recording Secretaries can contact their Territorial Communications Representative for posting local information on their respective Territory’s page on the IAM website (www.goiam.org).

The Communications Department provides local lodges with direct assistance in starting a local or district lodge newsletter or website. For locals without a current website, the IAM Microsite service is available. The Microsite service provides free web hosting and a “cut and paste” content management system that allows users to create a website from templates without having to learn HTML coding.

Departments of the International President

Aerospace Department

The Aerospace Department coordinates negotiations and other activities on behalf of aerospace workers in areas such as commercial and military aircraft; aircraft engines; light aircraft; missiles and rockets; aerospace electronic gear; satellites and space vehicles, and working under the Service Contract Act.

Automotive Department

Representing automotive technicians and mechanics nationwide, the Automotive Department works for strong contracts, job security, and effective safety standards.

Bylaws and Internal Disputes

The Bylaws Department assists locals and districts in developing, amending, and interpreting their bylaws. The Department ensures that proposed bylaws do not conflict with the IAM Constitution and handles disputes arising from differing interpretations of bylaws.

Collective Bargaining Department

The Collective Bargaining Department coordinates bargaining efforts within the IAM and with other unions. The Collective Bargaining Department also provides assistance in all matters relative to coordinated bargaining, inter-union jurisdictional matters (including IAM agreements with other unions, the AFL-CIO No Raid Agreement, and the AFL-CIO Constitution), boycotts, and the AFL-CIO Metal Trades Department (concerning the private sector).
Locals or districts that want to start newsletters or more advanced websites, should send their prospective editor or web steward to one of the annual Basic Newsletter or Web Development Schools at the Winpisinger Center. For locals requesting help with newsletters or a website that cannot send someone to the Winpisinger Center, contact the Communications Representative in your territory.

**Government Employees Department**

Employees in the public sector are governed by different laws and regulations in the area of collective bargaining and other union activities than employees in the private sector. The IAM maintains an expert staff in the area of regulations governing industrial relations in the public sector.

**High Performance Work Organization (HPWO) Partnerships Department**

The HPWO Partnerships Department assists local and district lodges and their employers in the design and implementation of new work systems. With the Department’s support, labor and management develop a plan to move from a traditional approach to workplace decision-making to one in which they make key business decisions jointly. The staff of the Department has developed an approach to make this conversion possible and provides support throughout the change process.

**Legal Department**

Provides important information about laws affecting working families on VLodge.net. Local lodges should direct all requests for specific legal services or questions through their respective General Vice President.

**Occupational Safety and Health, IAM CREST, Apprenticeship and Scholarships Department**

**Safety and Health:** The Recording Secretary shall correspond with this department on all matters pertaining to OSHA, plant safety, occupational injuries and deaths that result from on the job accidents. This will keep this headquarters department fully informed and in a position to act effectively on any matter which assistance or other action may be required. This procedure also applies to copies of all complaints and requests for investigation which lodges and their safety committees may file with government agencies.

**IAM CREST:** The Corporation for Reemployment Training (CREST) is a non-profit corporation sponsored by the IAM. The CREST program helps disabled workers return to work and provides safety awareness and hazardous materials training services.

**Apprenticeship:** Local lodges needing assistance in the establishment or operation of apprenticeship programs or advice on matters pertaining to federally funded training programs may direct their correspondence to the Grand Lodge Apprenticeship Department. Local lodges requesting issuance of completion certificates or wallet-size journeymen’s cards should direct their correspondence to the General Secretary-Treasurer’s office at the Grand Lodge.

**Scholarships:** Since Recording Secretaries may be requested to obtain extra copies of IAM Scholarship Competition announcements or to transmit requests for official scholarship application forms, they should become acquainted with the details of the annual announcement which the lodge receives in August each year (also available at www.goiam.org/iamscholarship). Lodges are requested not to send in requests for additional
announcements and application forms on behalf of applicants until after this letter has been received or until the new program has been announced in the IAM Journal.

Organizing Department

Organizing is everyone’s responsibility. When local lodges receive requests from unorganized employees for assistance in organizing, they should transmit that information to their servicing Representative and the Grand Lodge Organizing Department as soon as possible. It is essential to the success of the program that we coordinate organizing leads with the appropriate people.

Political and Legislative Department

The Recording Secretary frequently must write to the Legislative Department on behalf of the lodge or its Legislative Committee in connection with legislation before Congress. In such cases, the Recording Secretary should be sure to obtain specific information about the bill or bills in question (number of Senate or House bill, title of bill, sponsor, etc.) and include it in the letter. If the lodge is concerned with some problem involving members of Congress or a Congressional Committee, it is important that the lodge’s concern be explained in full detail in order to facilitate a quick response.

When a lodge receives a special request from IAM Headquarters for immediate lodge action in writing, faxing or e-mailing Congress on some emergency legislative matter, the Recording Secretary should pass this on without delay to the lodge president and Legislative Committee for appropriate action.

The Political and Legislative Department section of the IAM Headquarters website (www.goiam.org) maintains a wealth of information about pending legislative issues; urgent action items; and the ability to find, fax or e-mail your legislator. Communication with Legislators as directed by your local lodge, however, should always be done by letter with the official seal of the lodge (see page 26).

Retirees, Community and Membership Services Department

Works with IAM lodges to organize retirees into active members of the union by establishing retiree clubs and providing information and services for older workers. The department also works with locals and districts to assist lodge Community Services Committees. Membership services provides Employee Assistance Program help for members with problems such as drug or alcohol abuse or mounting debt. The department also provides help for lodges dealing with layoffs and provides services for unemployed members.

Strategic Resources Department

Normally, lodges requiring information which might be provided by the Strategic Resources Department on industry, economic and contract questions should address their requests to their Business Representative, to the servicing Grand Lodge Representative, or directly to the General Vice President in their respective territories. Similarly, District Lodges assume the responsibility for sending to the Strategic Resources Department copies of all new, renewed and amended agreements. However, this responsibility falls upon the local lodge and its Recording Secretary in the case of contracts negotiated by a lodge which is not affiliated with a District.

These copies are to be accompanied by the official Agreement Analysis Form, SRF-5 (available in the Strategic Resources section of Vlodge.net) which the Recording Secretary should make certain is filled out in full detail. Of particular importance for the completeness and accuracy of Grand Lodge Records is the information requested about the company’s
products and services. Also, care should be given to detailing the specific number of employees in the various groups covered by graduated wage increases.

**Trade and Globalization**

A lodge should always notify the Trade and Globalization Department of any anticipated plant closing or layoff, allegedly due to 1) foreign competition, 2) subcontracting or outsourcing to facilities in another country, or 3) transfers of technology, production, or production techniques to facilities in another country. This will permit the Department to commence early inquiries with both U.S. governmental institutions, trade entities and union brothers and sisters overseas.

Whenever an employer claims that a layoff or plant closing is due to any of these instances, the lodge should write to the Trade and Globalization Department with a copy to their General Vice President. In the letter of inquiry, the Recording Secretary should include all available information about the circumstances surrounding the anticipated or current employment loss as well as documents provided by the employer about its specific activities relating to the employment loss.

**Transportation Department**

The IAM Transportation Department provides the expertise and special services for contract negotiations, organizing and legislative issues required by workers in the airline and railroad industries. The department works closely with other transportation organizations and government bodies, such as the National Mediation Board, the National Railroad Adjustment Board, the Federal Aviation Administration, the AFL-CIO Transportation Trades Department and the Department of Transportation in a common effort to make the transportation industries in the North America the safest, most reliable in the world.

**William W. Winpisinger Education and Technology Center**

During the course of the year, the local lodge and the Winpisinger Center frequently exchange correspondence about educational programs and other matters. The following suggestions can help eliminate misunderstanding and delays in connection with Winpisinger Center services:

1. When requesting publications or information from the Winpisinger Center, be as specific as possible. Use the exact names and identifying numbers of publications or pamphlets and how many you need. To ensure we provide the right information, please include details about your program and how you plan to use the requested materials.

2. When you receive announcements about education programs in which the local lodge may participate, relay this information immediately to the lodge President and the Education Committee, and then report it at the next lodge meeting.
Women’s and Human Rights Department

The Women’s and Human Rights Department demonstrates the IAM’s commitment to women and minorities, ensuring civil and human rights for all our members in the United States and Canada. The department provides training for district and local lodges to develop effective Women’s Committees to ensure participation by women in our union and for active Human Rights Committees to ensure all IAM members are free from workplace discrimination and harassment.

Woodworkers Department

The Woodworkers Department was created in May, 1994 when the International Woodworkers of America - U.S. (IWA) affiliated with the IAM. The Department promotes the activities of natural resource industry-based locals and plays an important role in developing public policy regarding national and state forest management.
Writing to Your Legislators

PROPER FORMS OF ADDRESS

U.S. Senators

Hon. John Jones
United States Senate
Washington, DC 20510
Dear Senator Jones:

U.S. Representatives

Hon. Jane Smith
House of Representatives
Washington, DC 20515
Dear Representative Smith:

State Officials

Hon. William Brown
Governor of Oklahoma
Oklahoma City, Oklahoma
Dear Governor Brown:

City Officials

Hon. George Miller
Mayor of Newtown
City Hall
Newtown, Indiana
Dear Mayor Miller:

Member of House of Commons
(Canada)

Mr. Joseph White, M. P.
House of Commons
Ottawa, Ontario
Dear Mr. White:

Cabinet Minister (Canada)

The Hon. Gordon Williams, M. P.
Minister of
House of Commons
Ottawa, Ontario
Dear Mr. Minister:

Letters can be closed with Very truly yours, Sincerely yours, Respectfully yours.
Writing to a Legislator

A Recording Secretary frequently is authorized by the local lodge to write a letter to a Representative, Senator or Member of Parliament. When writing a letter about an impending bill:

1. Be specific about the name of the bill and the lodge’s position on it.

2. Use local examples and local facts to show why the members support or oppose the bill.

3. Ask for an explanation of any position taken by your Representative. A vague answer probably means disagreement.

4. Get as many individual members as possible to write letters. These individuals should mention cases or facts from their own experience. (“My uncle,” or “my friend.”)

5. Be polite. Don’t threaten.

Letters to your Representative can be closed with “Very truly yours,” “Sincerely yours,” or “Respectfully yours.”

A good style handbook will show the proper way to address people with other special titles.
Date

The Honorable Jane Smith
U.S. House of Representatives
Washington DC 20515

Dear Representative Smith,

Our Local Lodge represents more than 3,600 members who work and reside in your district. In this session of Congress, we urge you to support stronger protections for the right for workers to join unions.

The best way to protect America's middle class and improve our economy is for workers to have a fair share of the economic benefits they help produce.

We hope we will have your support for such a bill. We would appreciate hearing from you about your views on this matter.

Sincerely,

Jose Rodriguez
Recording Secretary

(Lodge Seal)
**Contacting Legislators by E-mail**

Handwritten letters are still the most effective way to contact your legislators, but e-mail is easier for many members to send a message. The IAM Activist Center on [www.goiam.org](http://www.goiam.org) has an easy-to-use section where U.S. members can find their members of congress, state legislators and local elected officials just by entering their zip code. There are pre-written “action-alerts” from the IAM Political and Legislative Department on important issues. Members can also compose their own message and look up voting records.

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**E-MAILING LEGISLATORS**

Click on the “IAM Activists Center” to compose an e-mail to your federal, state and local officials. You can also use pre-written action alert messages and look up voting records on key issues.
Filing

The Recording Secretary is responsible for keeping records so that the officers can check back on past events and actions. In the United States proper filing and record-keeping are particularly important, since the Landrum-Griffin Act requires that pertinent records be kept for five years. Minutes, however, are permanent records of the lodge and must not be discarded.

Minutes are one of the vital records of the lodge, but efficient files on financial records and correspondence are equally important. The IAM Constitution requires that all ballots and election records be kept for at least one year. This is also required by the Landrum-Griffin Act in the United States.

Separate Correspondence files should be set up for:

1. All correspondence dealing with lodge business. Letters received by the lodge should be filed, as well as copies of letters written by the Recording Secretary.

2. Official circulars issued by the Grand Lodge.

3. Policy letters issued by the Grand Lodge.

When there is correspondence that cannot be answered immediately because it requires further action, put it in a file called a “pending” or “suspense” file. By checking this file occasionally, the Recording Secretary will be reminded of unfinished matters. In many lodges, files are kept in officers’ homes. For home correspondence files, the best equipment is a portable file box and a set of file folders, which are available at any office supply store.

All correspondence and records are the property of the lodge. When the Recording Secretary goes out of office, all files and records must immediately be turned over to the new officers.
Filing Other Material

In may cases, Business Representatives keep a complete file on grievances. If this is not the practice, it should become the Recording Secretary’s responsibility to keep a grievance file. This will help the lodge determine past practices and trouble spots in the contract. This file may be kept by the date the grievance was written or by the subject of the grievance. For example, grievances might be classified as “seniority grievances,” “overtime grievances,” “rate grievances,” etc.

Other materials which should be kept in separate files for reference when dealing with company on arbitration cases, grievances and negotiations are:

1. Records and briefs on arbitration cases;
2. Minutes of grievance meetings;
3. Minutes taken during contract negotiations;
4. Company notices or posters on hours, vacations or policy changes;
5. Reports published by the Company, or the newspaper on the insurance plan, pension plan, company profits, etc.

The Recording Secretary should also set up a “subject file” to keep available the multitude of pamphlets, leaflets, announcements and other information which come to the lodge and which may be needed by officers and committees at any time.
Basic IAM Publications For Lodge Officers

Available from the IAM HQ Purchasing Department (301-967-4712, fax: 301-967-3428):
- IAM Constitution
- IAM Ritual
- IAM Officers’ Guide
- Manual for Lodge Recording Secretaries
- Handy Guide to a Well Conducted Union Meeting
- IAM Strike Manual
- Grand Lodge Official Circulars
- IAM New Member Kit
- Minutes Book
- Master Voucher
- Membership applications
- IAM merchandise

Available from the Winpisinger Education and Technology Center:
- IAM Educator Newsletter
- IAM Handbook for Lodge Education Committee
- The Steward – The Key to Becoming a Successful Steward
- Instructor’s Steward Training Manual
- Local Lodge Officers’ Duties and Responsibilities

Available from the Retirees, Community and Membership Services Department:
- Community Services in the IAM
- Guide for Workers’ and Retired Members’ Programs
- For lodges facing layoffs:
  - Guide for Union Leaders to Respond to IAM Members Facing Layoffs
  - Healthcare Options Brochure
  - Decisions and Choices
  - Guide to Survive

Available from the Women’s and Human Rights Department:
- Human Rights Manual
- Human Rights Action Guide
- Human Rights in the IAM (pamphlet)
- Pocket Guide for Handling Discrimination Complaints
- Women’s Program Action Guide

Available from the Legislative Department:
- Directory for the U.S. Congress
- Members Guide to the Machinists Non-Partisan Political League (MNPL)
- MNPL videos

Available from the OSHA, CREST, Apprenticeship and Scholarships Department:
- Apprenticeship Policy Manual
- Grand Lodge Scholarship Applications
Online Resources

**Goiam.org**

The Grand Lodge website, www.goiam.org, is a comprehensive online resource for news about the IAM and the labor movement. Members can sign up for *iMail*, the IAM’s electronic newsletter, view IAM-produced videos on the Machinists News Network, stay active in politics with the IAM Activist Center, get the latest news from their Territories, and access the *IAM Journal* via the IAM APP for tablets and smartphones or a PDF version that can be viewed online or printed.

**iMail**

Sign up for *iMail*, the IAM’s electronic newsletter, at www.goiam.org/iMail. *iMail* is sent out every Tuesday and Thursday and contains a mix of national and union news. All officers of a lodge should be signed up for *iMail* and lodges should encourage their members to also sign up.
IAM APP – www.goiam.org

The IAM APP enables members to use their smartphones and tablets to read the digital IAM Journal. To download the free IAM APP, go to GOIAM.org, look for the IAM APP graphic, and follow the links to Apple’s iTunes Store or the Android Market.

Facebook –
www.facebook.com/MachinistsUnion

The IAM has a page on Facebook for sharing information. Sign up as a “fan” at www.facebook.com/MachinistsUnion, or click on the Facebook icon at the top of any page on www.goiam.org.

Twitter –
http://twitter.com/MachinistsUnion

For up-to-the-minute news about the IAM, you can follow the Machinists Union on Twitter. Sign up to follow the Machinists Union at http://twitter.com/machinistsunion, or click on the Twitter icon at the top of any page on www.goiam.org.
VLodge.net

VLodge.net (www.VLodge.net) is a service provided by Grand Lodge that provides information about what’s happening in your local, district and territory; has an area for model contract language; has resources for your financial officer; has Official Circulars and has information on services available from the departments at Grand Lodge.

Because of the sensitive nature of the information available on VLodge.net, access is limited to only certain local lodge officers. Contact VLodge support at 301-967-3481 for information. Only Lodges that have filed their yearly report of officers to the IAM Roster Department will be granted access to VLodge.net. As Recording Secretary, it is your responsibility to ensure that report is filed.

William W. Winpisinger Education and Technology Center

Detailed information about programs, class schedules and services at the Winpisinger Center are available at the Center’s website (http://winpisinger.iamaw.org). The Center’s library also has an extensive collection of CDs, videos and books that can be borrowed by mail. A catalogue of materials and registration information to borrow materials is available on the Winpisinger website. The IAM members only section has a contract database, labor history, internet resource listings and an online learning center.

UCubed —
www.unionofunemployed.org

Ur Union of Unemployed, nicknamed UCubed, is an IAM community service project to help the 31 million Americans who have been laid off or working shorter hours because of the recession.
Notice: The election-related Official Circulars in this appendix are for illustration purposes only. The Recording Secretary should check with the General Secretary-Treasurer's Department or on VLodge.net to ensure he or she is using the current version of these circulars for conducting an election in Local Lodges in the United States.

Official Circular No. 809 LMRDA
   (Landrum-Griffin) Election and Other Requirements (US)

IAMAW Official Policy Regarding Local Lodge Elections (US)

Official Circular No. 787 Absentee Ballots (US)

Official Circular No. 815 Eligibility and Voting Rights of Retired, Laid Off or Exempt Members
TO THE MEMBERSHIP EVERYWHERE, GREETINGS:

⇒ PURPOSE To replace Official Circular 782 and previous circulars concerning the responsibility of IAM lodges in the United States to comply with the election requirements of the Labor Management Reporting and Disclosure Act (LMRDA or Landrum-Griffin Act), as well as the responsibility of all lodges, both in the U.S. and Canada, to comply with the election requirements of the IAM Constitution.

⇒ INFORMATION/INSTRUCTIONS The LMRDA imposes a number of requirements on the conduct of local and district lodge elections, and other matters. Many of these requirements have been incorporated over the years in the provisions of the IAM Constitution. Nevertheless, we continue to face Department of Labor (DOL) investigations and, sometimes, litigation when our lodges fail to follow these requirements. All IAM affiliated bodies, therefore, should be familiar with the provisions described below.

In order to assist IAM lodges, attached to this Official Circular is a copy of the IAM LOCAL LODGE ELECTION GUIDELINES. These guidelines provide a checklist of ten (10) key issues that all officers and representatives should familiarize themselves with, in order to ensure that all IAM elections are conducted properly. Compliance with these guidelines should greatly minimize the number of election protests received by the International President. This, in turn, will provide us all with more time to do the important work of representing our membership.

A. Rights of Candidates for Local Lodge Office

1. Section 401(c) of the LMRDA provides that every bona fide candidate has the right to request that the lodge distribute his/her campaign literature and the lodge must comply with all reasonable requests for distribution by members in good standing provided that the distribution shall be at the candidate’s own personal expense. The courts have defined a “bona fide candidate” as a member who has declared themself to be a candidate for office and who is eligible to run for that office.

2. All requests to distribute literature must be treated in the same manner. Any discrimination in favor of, or against, any candidate by the local lodge with respect to the use of membership lists is prohibited.
3. Every bona fide candidate shall have the right, once within 30 days prior to an election in which he/she is a candidate, to inspect – but not copy – a list containing the names and last known addresses of all members of the local lodge.

4. Any candidate shall have the right, upon request, to have an observer at the polls and at the counting of the ballots.

5. In order to comply with these important requirements, the secretary-treasurer of each local lodge or district lodge shall:
   a. Maintain a list of the names and last known addresses of all lodge members
   b. Maintain the list in the principle office of the lodge and make such list available for supervised inspection by a bona fide candidate one time only during the 30 days immediately preceding the election
   c. In a nondiscriminatory manner, and upon the request of any bona fide candidate, prepare labels or addressed and stamped envelopes, at a predetermined, prepaid cost, which is not less than the actual cost to the lodge, and mail campaign literature for the candidate
   d. Not permit the list to be copied, nor turn over labels or addressed envelopes to any candidate
   e. Not direct any bona fide candidate to the Grand Lodge to obtain mailing lists, labels, or envelopes, and instruct candidates that such requests cannot be honored. Under appropriate circumstances, however, and with proper approval by the territorial General Vice President, the lodge, itself, may request assistance in obtaining such lists

B. Use of Union Funds in Elections

1. Section 401(g) of the LMRDA provides that no funds of a local lodge, district lodge, council, or conference received by way of initiation fees, dues, agency fees, assessments, or employer funds shall be contributed or applied to promote the candidacy (either for nomination or election) of any member for office.

2. For purposes of Section 401(g), the term “funds” has been interpreted to include any resources owned by an employer or union, including machinery, telephones, cars, computers, reproduction equipment, etc. This would include the use of a lodge newsletter, mailing, website, email, or other electronic means of communication to promote the candidacy of any member for office.
3. A local lodge, district lodge, council, or conference may make expenditures from its funds for notices, factual statements of issues, and other expenses necessary to conduct elections so long as they do not involve the promotion of any candidate.

C. Conduct of Secret Ballot Elections

1. Notices of elections must specify the date, time, and place of the election, as well as the offices that will be filled. Notices must be mailed to each member at his/her last known home address not less than 60 days prior to the election.

2. Secret ballot elections need not be held when:
   a. all candidates are unopposed
   b. the union has provided a reasonable opportunity for nominations
   c. write-in candidates have not been permitted
   d. all other requirements of the law and the IAM Constitution have been met

D. Furnishing Members Copies of Contracts and the LMRDA

1. The LMRDA requires a lodge to provide copies of negotiated collective bargaining agreements to all members or other employees covered by the terms of the agreement, upon the written request of the member or employee. The recording secretary of the lodge shall also maintain at the lodge, for inspection, copies of all collective bargaining agreements.

2. Members or other represented employees may obtain a copy of the LMRDA by sending a written request to the General Secretary-Treasurer at IAM Headquarters.

    Fraternally yours,

Donald E. Wharton                                  R. Thomas Buffenbarger
GENERAL SECRETARY-TREASURER                   INTERNATIONAL PRESIDENT
Attachment
IAMAW Official Policy Regarding
LOCAL LODGE ELECTIONS

- Checklist of Ten Key Issues -

Note: Election Rules are based on bylaws, not the posted Guide

Revised October 2010
IAM LOCAL LODGE ELECTION GUIDELINES

- Checklist of Ten Key Issues -

Introduction

A. The following is a brief overview of the key issues involved in conducting elections for local lodge officers.

B. In addition, and prior to conducting any election, it is essential that all those involved review and be completely familiar with the following:

1. Pertinent provisions of the IAM Constitution (see, especially, Articles B, C and Article II, Sec. 3 and 4)

2. Local Lodge Bylaws

3. Officials Circular 809 (LMRDA Election Requirements)

4. Official Circular 787 (Absentee Ballots)

5. Official Circular 815 (Voting Rights of Retired, Laid Off, or Exempt Members)

I. What office must be filled by election?

A. President, Vice President, Recording Secretary, Secretary-Treasurer, Conductor/Sentinel, and 3 member Board of Trustees, and any other officers who are members of the lodge executive board.

B. Term of office for all officers is three (3) years.

II. Who is eligible to run for local lodge office?

A. Member in good standing of the local lodge for at least one (1) year at time of nomination;

B. Working at the trade during the six (6) month period prior to the nomination meeting (members who are retired on pension and paying full dues may run for the office without regard to the “working at the trade” requirement, however, they may not run
for office such as Business Representative or General Chairman; that have a direct impact on the collective bargaining agreement);

C. Satisfied meeting attendance requirement, if any (See Attachment B to the Checklist);

D. Not on indefinite layoff (See Official Circular 815).

III. **Who is eligible to vote for local lodge officers?**

A. Members in good standing;

B. Retired or exempt members and members on indefinite layoff (but such members may not vote for positions having a direct effect on the collective bargaining agreement, such as stewards or committee persons).

IV. **How must the local lodge notify its members of nominations and/or elections?**

A. Local lodges can satisfy all their obligations under the IAM Constitution and the law by having the Recording Secretary mail a single, combined notice of nomination and election. This mailing must be done not less than 60 days prior to the election and must be mailed to each member qualified to vote at their last known home address, even if the lodge knows the address is incorrect.

B. The notice must contain the date, time and place of nominations, the election and the runoff election should one prove necessary. It must be accompanied by an application for an absentee ballot and must specify who is entitled to receive an absentee ballot.

1. The requirement to send notices by mail does not apply to local lodges in Canada.

C. The notice should also be posted on bulletin boards, appear in newsletters and be posted on the lodge's web site, if they have one.

V. **How are nominations conducted?**

A. All nominations must be made from the floor by a member in good standing.

B. Members may nominate themselves.
C. Nominations may not be submitted in writing.

D. Members who are not present may be nominated, but they must have a letter on file with the Recording Secretary stating that they will accept nomination for that particular office.

VI. Who can vote by absentee ballot and how are such requests to be handled?

A. Members may vote by absentee ballot if they:

1. reside more than 25 miles from polling place;

2. are confined by verified illness;

3. are on vacation, official union business, employment assignment, reserve military leave or on leave qualifying under U.S. and Canadian family leave laws.

B. The Recording Secretary must:

1. Mail ballot packets to members who have filed written requests within 5 days of the close of nominations or as soon thereafter as ballots are available and present all voted absentee ballots to the inspectors;

2. Preserve all absentee ballots along with election materials for 1 year, including all written requests for ballots, lists of ballots mailed, identification stubs, unused ballots, ballots returned for incorrect addresses, envelopes containing voted ballots, voted ballots, challenged ballots declared void, impounded ballots and eligibility rulings made by the inspectors, tellers, or R.S.

VII. How must the lodge handle requests for distribution of campaign literature?

A. All candidates must be treated equally!

B. All candidates may inspect (but not copy) membership mailing lists once during the 30 days preceding the election and all candidates are entitled to have their requests to mail campaign literature (at their own expense) treated equally.
C. Candidates will not be given a copy of the mailing list, but gummed labels or addressed envelopes will be prepared by the lodge at a predetermined price, not less than the actual cost, and mail campaign literature for the candidate.

VIII. **How are election tellers appointed and what are their duties?**

A. The president shall, at least 60 days prior to the election, appoint at least three (3) tellers to conduct the election in a fair and impartial manner;

B. Tellers are responsible for conducting the actual balloting and tabulating the ballots; their specific duties are outlined in **Attachment A** to the Checklist.

IX. **What rules govern ballots and the balloting area?**

A. Voting instructions should clearly inform members as to the manner in which their ballot must be marked, the number of votes allowed for each office, and that write-in votes are not permitted.

B. The ballot itself should be arranged so that candidates for each office are clearly identified, with legitimate nicknames if the candidate so requests, and with the position of the candidate on the ballot being determined in any reasonable and fair manner, in accordance with the bylaws and/or past practice (such as alphabetically, by order of nomination, or by lot).

C. Ballots must contain a numbered, detachable stub upon which the voter will provide identifying information, including the voter's name, address, lodge and book number;

D. The balloting area and at least a 50 foot area surrounding it must be designated a “campaign-free” zone, and booths and/or partitions must be provided to permit members to mark their ballots in privacy.

X. **What is the role of observers?**

A. Each candidate has the right to one observer, but a candidate may not serve as his/her own observer or that of any other candidate;

B. Observers must be members of the lodge and serve at the expense of the individual candidates;
C. The following rules apply to observers: they must be permitted in areas where they can observe the voting and tabulation procedures; they may not handle ballots; they may not engage in campaigning (by wearing campaign apparel during voting or otherwise); and they may not converse with voters or obstruct the balloting process.
ATTACHMENT A

CONDUCTING AND TABULATING THE BALLOTING
-Duties of Local Lodge Tellers-

A. When conducting an election, tellers shall:

1. conduct the actual balloting and tabulation

2. account for all ballots, voter registers, and voting materials

3. determine the eligibility of voters and resolve challenges

4. ensure that the polls open and close at the stated times; permit members to vote if in line at the designated closing time

5. inspect the ballot box in the presence of the observers before the start of the balloting and then secure the box

6. seal the ballot box during any periods in which balloting has been interrupted and verify the seal before the ballot box is reopened

7. where machines are used in place of paper ballots, verify that they have been cleared and are in good working order prior to the start of the voting; insure that the machines are locked during any periods in which voting has been interrupted

8. require members voting on-site to identify themselves as required by the election rules and record each member as having voted

9. permit members to vote challenged ballots, and place such ballots in an individual envelope with the reason for the challenge written on it

10. place challenged ballots in the ballot box and resolve challenges if of sufficient number to determine the outcome of any election

11. provide a replacement ballot to a member who has spoiled the initial ballot and maintain custody of such ballots and account for them

12. open absentee ballots, check the enclosed detachable stub to determine the eligibility and identity of the voter, and commingle ballots cast by eligible voters with those cast on-site, prior to the start of the tabulation process
13. require voters to cast their ballots in the secret balloting booths provided

14. maintain a campaign-free zone around the voting area, periodically police the area during the balloting and remove any campaign materials

15. prohibit members from lingering in the election room or engaging in campaigning while waiting to vote

16. refrain from wearing any campaign buttons or political garments indicating support for any candidate

17. report the results of the election and ensure that all election records are delivered to the R.S. of the lodge for preservation for one year

B. When tabulating the ballots, tellers shall:

1. prohibit candidates or observers from handling ballots

2. no open ballots until the observers for the candidates are present, if they choose to be in attendance

3. record votes for the candidate(s) designated by the voter, if the tellers can determine the voter=s intent

4. void that portion of the ballot if a voter fails to vote for the stated number of open positions for any office, however, this does not void the entire ballot

5. void a ballot in its entirety if the voter has defaced the ballot or made markings which identify the voter

6. void the ballot for that office if the voter has voted for too many candidates for one office

7. count the ballot cast on-site and impound the absentee ballot of a voter who has cast an absentee ballot and also votes on-site

8. void the ballot for that office if a voter has indicated a write-in vote

9. mark "void" through any ballot or specific portion of a ballot which is not being counted, record the reason and initial the ballot

10. void any absentee ballot without a completed identification stub
ATTACHMENT B

MEETING ATTENDANCE REQUIREMENTS

Article B, Section 3 of the IAM Constitution grants to local lodges the authority, through their bylaws, to require members to have attended up to 50% of the regular lodge meetings held during the twelve month period ending the date of close of nominations in order to qualify as an officer or delegate. Several points need to be clearly understood when applying this language.

1. Only regular meetings count in determining a member’s eligibility. Special or called meetings are not counted.

2. Only meetings at which a quorum was present count.

3. Article B, Section 3 lists the various reasons for which members must be excused from regular meetings. The lodge should adopt a clear policy on the time limits for submitting requests to be excused.

4. The lodge must establish a method of determining who, in fact, attends the meetings. A sign-in sheet or log book must be kept. The lodge must establish a policy as to the manner in which members must sign-in or register.

5. Any lodge policies established in connection with the meeting attendance requirement must be enforced in a uniform manner.

6. When lodge members have been granted excuses from attending some meetings, the method for determining their eligibility is as follows: take the number of meetings held; then subtract the number for which the members was excused; divide by two and round all fractions down in favor of the member.

Any questions as to a particular member’s eligibility must be resolved promptly so that the process of printing the ballots may proceed in a timely manner. To facilitate the resolution of eligibility questions, the sign-in sheets or log book and the record of approved excused absences should be available at the nominating meeting. The president of the lodge is the final arbiter in these matters, subject to appeal to the International President.
TO THE MEMBERSHIP EVERYWHERE, GREETINGS:

⇒ **SUBJECT**  Policy on the use of absentee ballots in local and district lodge elections

⇒ **PURPOSE**  To update and bring into compliance Official Circular 730 and previous circulars concerning absentee ballots.

⇒ **INFORMATION/INSTRUCTIONS**  The IAM Constitution, in Article II, Section 3, lists the reasons that members may be entitled to vote by absentee ballot and the specific procedures that must be followed when absentee ballots are requested. Article XXII, Section 7, and Article B, Section 4, of the IAM Constitution, in turn, govern nominations and elections for local and district lodge office and provide for the use of absentee ballots in accordance with the provisions of Article II, Section 3. It is essential that these provisions, as well as applicable local or district lodge bylaws, be strictly adhered to in conducting lodge elections. Failure to apply these provisions consistently is one of the most common reasons that lodge elections are challenged by the U. S. Department of Labor. Accordingly, in order to avoid the cost of a re-run election and/or court challenge, the provisions of the IAM Constitution and this circular must be followed.

**A. Eligibility to Vote by Absentee Ballot**

1. Members who reside in outlying districts more than 25 miles from the designated balloting place.

2. Members who are either confined because of verified illness or on leave qualifying under U.S. and/or Canadian family leave laws.

3. Members who are on vacation.

4. Members who are on official IAM business approved by the local, district, or Grand Lodge.

5. Members who are on an employer travel assignment.
6. Members who are on reserve military leave.

B. Absentee Ballot Procedures

1. Pre-printed requests for absentee ballots, listing the aforementioned qualifications, may be made available by the local or district lodge, or candidates running for office.

2. A request for an absentee ballot must be delivered by the requestee either in person or by official government mail to the recording secretary of the local lodge or the secretary-treasurer of the district lodge not later than thirty (30) days prior to the election.

3. The recording secretary or secretary-treasurer shall verify the reason indicated by the member for requesting an absentee ballot at the time the request is received. If the member is eligible to vote by absentee ballot, a ballot shall be mailed to him/her. In the event the recording secretary or secretary-treasurer determines that the member is not eligible to vote by absentee ballot, he/she shall advise the member that the request for an absentee ballot has been denied and the reason for that determination. All such denials shall be mailed within ten (10) days of the receipt of the request, so that the member has adequate notice of the need to vote in person.

4. When an eligible member receives an absentee ballot, that ballot must be executed in accordance with the terms of the IAM Constitution and mailed by official government mail to the recording secretary or secretary-treasurer so that it will be received by or prior to the closing of the polls, as specified in the notice of election. The absentee ballots shall then be turned over to the inspectors of election (tellers).

Fraternally yours,

Donald E. Wharton  
GENERAL SECRETARY-TREASURER

R. Thomas Buffenbarger  
INTERNATIONAL PRESIDENT
TO THE MEMBERSHIP EVERYWHERE, GREETINGS:

➤ PURPOSE To replace Official Circular 791 concerning the eligibility of certain members to run for office, to vote for lodge officers, and to participate in contract ratification and strike votes.

➤ INFORMATION/INSTRUCTIONS IAM policy concerning the rights of certain members to participate in union activities is set forth below.

A. Retired or Exempt Members

1. Members who are no longer working at the trade are not eligible to run for office.

2. Members who are retired on pension and paying full dues, whether or not they hold a retirement or exemption card, are eligible to run for lodge office.

3. Retired or exempt members may vote in local and district lodge elections for constitutional offices, business representatives, general chairpersons, or delegates.

4. Retired or exempt members may not vote for any position that has a direct impact on the collective bargaining agreement, such as stewards or committee persons.

B. Unemployed Members

1. Members on indefinite layoff – who are not notified on the day they are laid off when to return to work – may participate in the affairs of the local lodge and vote for delegates, business representatives, general chairpersons, and constitutional officers. Such members may not participate in contract or strike votes or in any other matters having a direct impact on a collective bargaining agreement.
2. Members who have been on indefinite layoff, but who have received a recall notice to return to work on a specific day, are eligible to participate in votes affecting contract demands and other business concerning the collective bargaining agreement.

3. Members on temporary layoff – who are notified on the day of their layoff the date of their return to work – are eligible to participate in votes affecting contract demands and other business concerning the collective bargaining agreement.

4. Members on temporary layoff are eligible to run for lodge office, consistent with Article II, Section 4, of the IAM Constitution, which deals with the qualification “working at the trade.”
   a. A member who experiences a layoff during the six (6) month period prior to the date of nominations is exempted from the qualification “working at the trade” and, therefore, may run for office
   b. A member who experiences a layoff beyond the six (6) month period prior to the date of nominations is not exempted from the “working at the trade” qualification and, therefore, is ineligible to run for office

5. A member who has been installed into a constitutional office and who, thereafter, is laid off has the right to continue in the office until his/her term expires.

6. A member who is elected to an office which holds “superseniority” under the terms of a collective bargaining agreement, may not use this “superseniority” to bump back into the shop prior to his/her scheduled recall. The procedures for filling the position set forth in the lodge bylaws should be followed, and if they are silent, it is the responsibility of the president to make a pro-tem appointment until the member returns to work.

7. A member who is laid off from an IAM plant, but who continues working at the trade in a non-IAM plant, is eligible to continue to hold a constitutional office so long as he/she remains current in the payment of regular IAM dues.

Fraternally yours,

Donald E. Wharton
GENERAL SECRETARY-TREASURER

R. Thomas Buffenbarger
INTERNATIONAL PRESIDENT