

GUIDELINES FOR ESTABLISHING
IAMAW RETIREE CLUBS

Call me by my new title:
Retiree!



Proud sponsors of the golden years.

Table of Contents

Letter from IAMAW International President Robert Martinez Jr.....	2
IAMAW Retired Members Program	3-6
<ul style="list-style-type: none">• Purpose and Importance• How Retiree Clubs Benefit Your Lodge• Benefits for Members Approaching Retirement• Establishing a Retiree Club	
Determine the Clubs Structure and Financial Needs.....	7-10
<ul style="list-style-type: none">• Define the Type of Organization You are Creating• Outline the Financial Structure• Define Club Membership• Outline the Leadership Structure• Develop Bylaws	
Member Recruitment.....	11
The Role of the Lodge.....	12-13
<ul style="list-style-type: none">• Status of Retired Members in Lodges	
Essential Tools for Outreach and Engagement.....	14-15
<ul style="list-style-type: none">• Building a Membership Data Base• Developing and Maintaining a Club Website• Use of Social Media for Your Club	
Procedures Regarding Retiree Club Bylaws.....	16-21
Retiree Club Member Information Form.....	22
Retiree Club Executive Board Information Form.....	23-26
Retiree Club Meeting Sign in Sheet.....	27-28
Expense Reimbursements.....	29-32
<ul style="list-style-type: none">• Guide to File for Reimbursement• Lodging Expenses• Transportation-Related Expenses• Vendor/Contractor Expenses	
Letter from Retirees Department Director	33-34
Inserts	
<ul style="list-style-type: none">• Remain Active in Your Union and Retired Member Organizing Volunteer Form• What You Need to Do to Retire• Become a Retiree Member• Retirees & Employees Assistance Program• Member and Employee Assistance Education Program (EAP)	
<i>*Please copy and distribute this information with fellow IAM Retirees.</i>	

**International
Association of
Machinists and
Aerospace Workers**



9000 Machinists Place
Upper Marlboro, Maryland 20772-2687

Area Code 301
967-4500



OFFICE OF THE INTERNATIONAL PRESIDENT

October 5, 2016

Subj: Retiree Clubs Retired IAM Members

To All Districts Lodge Presidents and Secretary-Treasurers, Local Lodge Presidents and Recording Secretaries, TCU Carmen Division Officers, National Representatives, Assistant National Representatives and Local Lodge Officers:

Dear Sisters and Brothers:

Our retirees are a much-needed force to make our union stronger. We need to do much more to tap their expertise, dedication and energy. In order to accomplish this, I ask that you take all necessary steps to encourage the involvement of our retirees in all functions of your lodge. Please encourage them to participate as much as they are available to assist and remain involved.

We're in the process of contacting thousands of retired IAM members, and we plan on staying in touch. We want to continue our commitment to providing assistance in obtaining the benefits and services our retirees deserve. A crucial part of this is establishing new retiree clubs and keeping retired members visibly active in the labor movement.

Let's face it: Retirees have been doing it longer, and they know how to get the job done. We don't have to tell them the value of a union. They know how to organize and have been most instrumental in the longevity of our union, the IAMAW.

On behalf of our great organization, I respectfully request your cooperation and assistance in our pursuit to connect with our retired IAM members. As opportunities present themselves, I ask all levels of our leadership to work with State Councils, Districts, Locals and existing Retiree Clubs to participate in this organization-wide effort.

Respectfully, we need the full participation and support of everyone to promote Retiree clubs, Retiree committees and Retiree events. Please update and forward the most current list of Retirees Clubs or prospects for new clubs to the IAM Retirees and Employee Assistance Program Services Department, Director Edward Manhart, 9000 Machinists Place, Room 305, Upper Marlboro, MD 20772.

I give you my advance sincere appreciation and thanks for your cooperation in making this effort a success.

In Solidarity,

Robert Martinez, Jr.
International President

cc: Executive Council
Chiefs of Staff
Dir. Manhart

IAM Retired Members Program

- The Purpose of IAM Retiree Clubs

For many years we have been negotiating contract provisions which make it possible for IAM members to retire earlier. Many retirees have maintained their good-standing membership in the IAM by applying for retirement, exempt or life membership cards. Whether or not retirees have maintained IAM membership there are many benefits they may receive from a local or district lodge retirees club. We all benefit from our retirees past and present involvements in the labor movement.

It only stands to reason why we firmly believe that retired members should remain involved in their union. Their life experiences lend a wider understanding of the issues we all face. Their assistance provides the collective support needed in accomplishing our common goals. In spite of retirement, they remain a substantial influence in our lives from the bargaining table to the ballot box. It is more than evident, we must encourage retired members to remain active in their union and participate in the IAM Retirees' Department program.

Briefly, the overall objectives of our retiree clubs are:

- To provide retirees with useful social and recreational facilities and opportunities to enjoy their "golden years";
- To foster fraternal ties of IAM members during the years of retirement;
- To keep retired members informed of IAM programs, policies and objectives;
- To keep the IAM informed on the special problems of retired members;
- To enlist support of retired members for IAM objectives;
- To help retired members secure housing, medical care, drugs and other consumer goods and services at prices they can afford.

- **The Importance of IAM Retiree Clubs**

After routinely working thirty or forty years most people eagerly look forward to the day when they no longer have to punch a time-clock, but soon thereafter many suffer a letdown. Some may find it difficult to break the habit of work. Others worry about not having a use in life. Many of them long for the feeling of accomplishments that comes from work.

Frequently the conversation with fellow retirees revolves around missing people from the workplace, kidding around, shoptalk and those coffee breaks.

Nearly everyone resents the loss of things they must do without on reduced incomes. Cutting back on some of things we all grow accustomed to during our working years such as vacations or days at the ball park can be another letdown.

Unfortunately for some, retirement eventually means sitting around the house watching TV, feeling older than they are, worrying about their health. But, this is not the way it has to be.

The good news is these years of retirement are their “golden years.” These are the times for old friends to get together, share new experiences, learn new arts and skills, develop new interests and participate more effectively in community affairs.

The primary purpose of an IAM Retiree Club is to assure every effort is made to keep retirees active in their union so that the retirement years of our members will indeed be “golden years”. Through IAM Retiree Clubs, members can develop a program of satisfying activities while remaining part of the labor movement. They can meet together to try to ease some of the personal, financial and physical problems that come with aging. Greater involvement in clubs and community affairs will give them a feeling of greater usefulness in life.

- **How Retiree Clubs Benefit Your Lodge**

When retired members are mobilized into active retiree clubs, they can help your lodge achieve goals that benefit working people in general.

Despite the emphasis on youth in our society, more than 30-plus million people are age 65 or over. A union-sponsored program geared to the needs of older Americans is a valuable resource. There are ten-thousand workers entering retirement daily. We cannot reach many of the goals we seek in health, housing, employment and education through collective bargaining alone. Positive change must come from political and legislative effort. With that, we must conduct programs to educate every age group of the population on these issues. Our young working Machinists and retired members must retain the labor union connection and continue collectively in achieving their goals.

The fact is organized labor is a minority in both the United States and Canada. However, we are an effective minority. In order to reach our legislative goals, collectively we need all the political help we can get. A structured program for retired and working members adds to our voting strength, it is our effectiveness. This is one of many benefits we receive from our IAM Retirees Program and IAM Retirees Clubs.

- **Benefits for Members Approaching Retirement**

As members reach their late 50s they soon realize that their working years are nearing an end. Although they look forward to retirement, they are generally aware facing new problems, including but not limited to:

- How to manage financially on a reduced income
- The pros and cons of moving to a warmer climate
- The pros and cons of special housing projects for senior citizens
- If their auto insurance will be cancelled
- The extent to which Medicare will meet the costs of illness in old age

With the establishment of a Retiree Club, retirees can conduct special sessions once or twice a year devoted to questions of interest to members nearing retirement. This can be most effective with the assistance and support of IMAW District and Local Lodges.

- Establishing a Retiree Club -

- Identifying the Club's Objectives

- First, before we get too far along in the planning of a Retiree Club, let's take some time to gather some "founding members" and have a discussion about our shared objectives for this new retiree club. Try to reach an agreement on answers to the following questions:
- Why are we forming a retiree club?
Define a clear objective, a mission for the club.
- Will this strictly be a social club for regular gatherings or are there other reasons for getting together?

Consider drafting a mission statement.

- Work as a group to articulate the reason for your club in a short statement by brainstorming with fellow members. Think about what you would tell others about the club. How would you describe the purpose and the club's objectives?

What are our long-term goals? For example,

- Will you offer services or resources to members?
- How much will you need to support the Club?
- Will you be charging membership fees?
- Will you raise funds?
- Will you hold events?
- Will you be lobbying? -

Determine the Clubs' Structure and Financial Needs

- Define the type of organization you are creating

If your organization is strictly a “social club”, with the objective to gather members together for social activities, you probably don't need to worry too much about a formal structure. It's good to stay basic and build as the clubs' needs grow.

However, for clubs that will be charging for membership, running events, lobbying the government and so on, you will need to define the type of organization you are creating.

For example, clubs that intend to raise funds may need to determine if they meet the criteria to qualify as a non-profit for tax exemption purposes. The criteria can be different, depending on the county, state or province in which you start the club. There are many types of non-profit or not-for-profit categories that will determine whether your club is eligible for tax exempt status.

For example, in the U.S. the *Internal Revenue Service (IRS) has rules governing social clubs that are entitled to no tax exemption under Section 501 (c) (7).

If you want to look into non-profit status:

In the U.S. (Internal Revenue Service) – <http://www.irs.gov>

- “Nonprofit – IRS Classifications” e.g., 501 (c)(1), 501 (c)(2) and 501 (c)(3)

In CANADA (Canada Revenue Agency) - <http://www.cra-arc.gc.ca>

- Revenue Canada offers details on the definition of a non-profit and tax implications: <http://www.cra-arc.gc.ca/E/pub/tg/t4117/t4117-e.html>

- **Outline the Financial Structure**

For any organization developing and maintaining effective records is the key to success. This includes financial record keeping. Once your leadership team is in place consider the following.

- Identify any and all sources of possible income (e.g. membership fees, funds raised, etc.)
- Itemize all potential club expenses related to existing meetings/events as well as plans for the next year (e.g. meeting room costs, food, equipment, bank fees, promotional costs, member service costs, etc.)
- Develop a draft budget
- Draft financial policies for the club (e.g. member fees, meeting fees, sponsorship levels, etc.)
- Have your leadership team review and finalize the budget and financial processes together

**Remember, most activities have some associated costs so be sure to carefully plan out your club's yearly budget for both potential expenses and potential sources of income.*

- **Define Club Membership**

During the establishment of your club the founding members shared a clear understanding of its mission and objectives. As new members begin to join you will need to explain clearly in detail what the membership entails.

Here are some of the things you may want to define:

- Who are you targeting for members?
- Are there membership criteria they must meet?
- Are there restrictions?
- Will you charge membership fees?
- Will there be different types of members or membership levels?

Remember:

As you plan for organizational growth you will need to firm up the specific criteria for benefits of membership.

- **Outline the Leadership Structure**

Your club will also need a leadership or governing structure. Again, the type of organization will determine whether it should be formal or informal. In other words, will you operate through an Executive Board or create a less formal club management arrangement?

Some key leadership roles you might want to consider

- **President** is the representative who will lead the club and act as a spokesperson. (the title might be President, Board Chair, Revolving meeting leader, etc.)
- **Vice President** is a supportive role that offers a backup for the leader. (the title might be Vice Chair, etc.)
- **Treasurer** is a position responsible for keeping track of club money, fees, expenses, paying bills, etc. (the title might be Secretary Treasurer, etc.)
- **Communications Manager/Secretary** is a position responsible for both maintaining member records as well as developing member recruitment strategies. (the title might be Recording Secretary, etc.)

Regardless of the type of leadership positions or the names you choose, be sure that you develop clearly defined job descriptions that are agreed to by all organizing members. The individuals who hold these positions need to fully understand the expectations and the responsibilities involved. Once these rules are defined, open up nominations and hold elections to be sure that roles are filled in a well-documented and democratic manor.

As your club grows you might need to consider having additional roles and/or a full executive board or committee to help manage its operations.

- **Develop Bylaws**

Once you have established your leadership structure the group can help create and finalize the club's mission statement and establish bylaws that govern the club and its members. It is most helpful to have formal rules and terms of reference. A set of bylaws for the club will establish a sense of order.

- Member Recruitment

As a group, identify your ideal club profile. Then, as a group, define your membership benefits to develop your marketing strategy. Depending on the type of club you are creating you will need some ideas for both member engagement and member recruitment tools.

Here are some general ideas for promoting your club to potential members.

- Create a Membership Committee to brainstorm recruitment strategy and take responsibility for recruiting and orienting new members.

- Start a Member Referral Program. Ask each member to recruit another new member.

- Hold an Open House so that potential members can get to know member benefits first-hand.

- Use existing networks to recruit new members. Ask members to promote the club within their existing networks with other retirees.

- If you decide to have a website, be sure to include the link to the membership application form from our department web-page. Along with ensuring that the benefits of membership are clearly outlined on your website, be sure to include a membership application and option for potential members to contact a leadership or membership club member with questions through email.

- The Role of the Lodge

Although your retired members will organize, plan and conduct their own program, they may need sponsorship and some help from your Lodge especially in the beginning. This means that the Lodge may take on new responsibilities. When the question of sponsorship is being considered the members will want to know how far this responsibility extends. Someone in the Lodge is certain to ask: "How much will it cost?"

The answer lies with the Lodge itself. The financial support you give your retiree club can range from modest to substantial. It may be no more than a fifty-dollar, one-shot authorization to get the club started. Or it may involve additional contributions occasionally to assist the club with special programs or projects. Or, since the club's own income will be limited by the members' financial inability to pay more than token monthly dues, the lodge may want to earmark a specified sum each month for the club's activities.

Financing is only one part of your responsibility. You should be prepared to help the club in other ways. For example, make the Lodge hall available for meetings; let the club use your computers and other office equipment. If you have full-time help in the Lodge office, instruct them to lend a hand in getting out notices or newsletters. In larger Districts it may be possible to set up a "drop-in" center where retired members can come for a visit, etc.

- **Status of Retired Members in Lodges**

One of the foreseeable results of a successful retired members program is that retirees will become more interested and active in Lodge affairs. This raises a question as to the extent to which they may determine Lodge policies. Below are some clarifications on the rights of and restrictions upon retired members.

Occasionally when members retire from active employment they maintain their active membership by continuing to pay regular monthly dues.

However, most who keep their affiliation do so either by taking out a retirement card or by being issued Exempt or Gold Card membership upon completion of the prescribed number of years of good-standing membership.

On the basis of our constitutional law and policies, retirees in good standing, which includes those with Exempt or Gold Card memberships, may attend meetings, participate in affairs of the Lodge, vote on motions, and nominate and elect District, Local and Grand Lodge officers.

Retirees paying full dues may run for Local Lodge office and serve as Local Lodge Delegate to IAM conventions.

Retirees may not, however, take part in the formulation of contract demands, ratification of agreements, strike votes, or any matter that has a direct effect on the collective bargaining agreement, or participate in the nomination and election of -- nor serve as -- shop stewards or grievance committeepersons.

- Essential Tools for Outreach and Engagement

Now that you have created a club structure you can start to think about ways to communicate with your existing members and also promote your club to potential new members. Here are some initial promotional methods to consider.

- Building a Membership Database

Your membership data is truly the heart of your club and the care and maintenance of your membership list is critical to your continued success. After all, you will need an up-to-date list in order to mail, text, or email meeting invitations, requests, and acknowledge member fees.

There are many methods you can use to maintain this data base, but if you want to ensure it is easily updated and available to all those Board Members and/ volunteers that need it, you might want to consider managing this database with easy access.

- Developing and Maintaining a Club Website

A website is the “public face” of your club to members, prospective members, the media, and the general public. The key to an effective website is updating content frequently for both accuracy and search engine optimization. *Your website should outline the benefits and include a membership application and contact information for potential members to connect and ask questions.

To ensure you have fresh website content you need to create a site that is easily updated and maintained by your club communicator or volunteer(s).

Before launching a website, please understand the requirements and responsibilities of the task. If a site isn't updated frequently the information becomes stale and users will stay away. This creates an image you do not want for your Club. Ongoing responsibilities include payment to the server, software updates, and email accounts. It is a good idea to have a backup person or extra help with the site in the event there are times the Web Steward is not available or unable to maintain the Clubs' page.

- **Use of Social Media for your Club**

Have you considered if or how you will use social media to engage existing members and recruit new members?

When starting social media it is recommended to start slowly and cautiously to get familiarized before you fully commit. Remember, others will want to stay in touch so it should be straight forward and simple. While there is no one-size-fits-all strategy for launching into social media, most experts suggests that organizations new to social media take it slow.

- Start by following and monitoring to learn the platform
- When familiar, create connections and partnerships by participating in online conversations
- Establish your social media goals and develop a realistic plan
- Begin to build a presence on the social media forum you are best acquainted with and others will follow.
- Learn by understanding social media sources, their operational requirements, reliabilities and the extent of their influence to users.

- **So, You're Retiring**

The IAMAW continues working to insure members retire properly and without any hardship. We ask all Districts and Locals to assist members to remain informed of their individual responsibilities as they retire from employment. As you approach retirement, contact your shop steward, shop committee and business representatives. Union Officers can assist you greatly during this process. Understanding your responsibilities under the IAM Constitution are important factors in your retention of membership and your rights in the union.

IAMAW PROCEDURES REGARDING **RETIREE CLUBS' BYLAWS**

As in the case of an IAM Local Lodge, Bylaws for an IAM Retirees' Club must be in compliance with the provisions set forth in the International Association of Machinists and Aerospace Workers Constitution, Article D, entitled Government of Local Lodges, Bylaws.

SEC. 1. Each Local Lodge may adopt its own Bylaws, provided that nothing is contained therein which is contrary to the provisions of this Constitution. The proposed Bylaws of all Local Lodges, and all amendments thereafter proposed, except as to time and place of the meetings, shall be submitted to the International President for examination, correction, and approval before being placed into effect.

The International President, upon approving any Local Lodge Bylaws and/or amendments thereto, shall designate the date when such Local Lodge Bylaws and/or amendments shall take effect.

I M P O R T A N T ! **P L E A S E N O T E**

FOR APPROVAL OF RETIREE CLUB BYLAWS, PLEASE SEND
A COPY TO GRAND LODGE:

International Association of Machinists and Aerospace Workers
Attn: Bylaws Department
9000 Machinists Place
Upper Marlboro, MD 20772

APPENDIX A

IAMAW Bylaws

(model or example)

IAMAW District/ Local Lodge Retiree Clubs:

Statement of Purpose; IAM Retiree Club (Insert Club Objectives)

IAM Objectives; *Example (from page 9)*

- *To provide retirees with useful social and recreational facilities and opportunities of enjoying their “Golden” years;*
- *To foster fraternal ties of IAM members during the years of retirement;*
- *To keep retired members informed of IAM programs, policies and objectives;*
- *To keep the IAM informed on the special problems of retired members;*
- *To enlist support of retired members for IAM objectives;*
- *To help retired members secure housing, medical care, drugs and other consumer goods and services at prices they can afford to pay.*

ARTICLE I

NAME AND TIME OF MEETING

Section1. This IAM Retirement Club shall be known as

_____ Local (or District) Lodge

No. _____, International Association of Machinists and Aerospace

Workers, (City) _____ (State) _____

Section 2. The regular meeting shall be held on the _____

of each month at _____, except when the meeting date falls on a generally recognized holiday, in which event a substitute day of meeting shall be set at the preceding meeting.

Section3. _____ members shall constitute a quorum for a regular meeting.

Section4. Special meetings may be called and conducted by the President.

- a. _____ members shall constitute a quorum for a special meeting.
- b. Members shall be notified by mail or other appropriate method, at least forty-eight hours before the special meeting is to be held.

ARTICLE II

OFFICERS AND THEIR DUTIES

Section1. The Officers of this club shall be nominated in the month of November and elected in the month of December of each year.

Section2. The Officers of this Club shall consist of a President, Vice President, Recording Secretary, *Financial Secretary, *Treasurer, *Conductor, *Sentinel and a Board of Trustees, consisting of three (3) members. An *Audit Committee consisting of three (3) members shall be elected at the same time and serve the same term.

**NOTE: The offices of Financial Secretary and Treasurer as well as Conductor and Sentinel may be combined; i.e., Secretary-Treasurer and Conductor-Sentinel by-laws must stipulate choice. Officers may not are not eligible as members of the Audit Committee.*

Section3. All vacancies of offices between annual election covering officers, Executive Board members and Delegate shall be filled by temporary appointment by the President of the Club with the approval of the Executive Board.

Section4. No one shall hold more than one office at one time.

ARTICLE III
THE EXECUTIVE BOARD

Section1. The Executive Board shall consist of all Club Officers. The President shall chair meetings of the Executive Board and the Recording Secretary shall be the Secretary of the Executive Board.

Section2. A majority of the members shall constitute a quorum for Executive Board meetings.

Section3. The Executive Board shall conduct its business in a methodical and businesslike manner, keeping a record of its proceedings and otherwise conducting its affairs according to the principles reflected by the IAM.

Section4. The Executive board shall meet at least once a month to transact any business referred to it by this Club. The Chairperson and the Secretary of the Executive Board may call a special meeting by notifying all members of the Board.

Section5. It shall be the duty of the Executive Board to deliberate upon all matters referred to it by this Club and all other matters coming to its attention for the good and welfare of this Club, and as soon as possible thereafter to report to the Club its recommendations.

ARTICLE IV
FEES AND DUES

Section1. The qualification for membership shall be that the individual was a member of the IAM at retirement.

Section2. The monthly dues of this Club shall not be more than \$1.00 per month.

ARTICLE V
RULES OF ORDER and the ORDER OF BUSINESS

Section1. Rules of Order and the Order of Business shall be as set forth in the IAM Constitution.

ARTICLE VI

Section1. The following committees shall be appointed by the President with the approval of the Executive Board:

- **By-Laws**
- **Legislative and Political Action**
- **Community Services**
- **Sick and Visitation**

ARTICLE VII

There shall be no by-laws, rules, or actions taken by the Club that would conflict with the IAM Constitution or policy.



International Association of Machinists and Aerospace Workers

Retiree Club Member Information Form

Please Print

NAME OF CLUB: _____

RETIREE'S NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____

ZIP CODE: _____

HOME: _____ CELL : _____

EMAIL: _____

I would like to volunteer for:

_____ Organizing Retiree Clubs

_____ Organizing in the IAM

_____ Community Services

_____ Get Out the Vote (GOTV)

_____ Membership Education

_____ Other Ideas - explain below

Do you have a membership card for the Alliance for Retired Americans?

YES _____

NO _____

What **Retirees' Card** do you have?

RETIREE _____ EXEMPTION _____ GOLD/ 50 year /Lifetime _____

NOTE: This information form is for the use of the Retiree Club records only.

IAM RETIREE CLUB EXECUTIVE BOARD INFORMATION FORM - Page 1 of 4

CLUB NAME:

DATE: _____ DISTRICT: _____ LOCAL: _____

LIST OFFICERS BELOW

President:

Address:

Phone: _____ Email: _____

.....

Vice-President:

Address:

Phone: _____ Email: _____

.....

Secretary – Treasurer

Address:

Phone: _____ Email: _____

IAM RETIREE CLUB EXECUTIVE BOARD INFORMATION FORM - Page 2 of 4

Recording Secretary:

Address:

Phone: _____ Email: _____

Conductor -Sentinel:

Address:

Phone: _____ Email: _____

Trustee: _____

Address:

Phone: _____ Email: _____

Trustee: _____

Address:

Phone: _____ Email: _____

Trustee: _____

Address:

Phone: _____ Email: _____

IAM RETIREE CLUB EXECUTIVE BOARD INFORMATION FORM - Page 3 of 4

Audit Committee:

Address:

Phone: _____ Email: _____

Audit Committee:

Address:

Phone: _____ Email: _____

Audit Committee:

Address:

Phone: _____ Email: _____

By-Laws Committee:

Address:

Phone: _____ Email: _____

Legislative and Political Action Committee:

Address:

Phone: _____ Email: _____

IAM RETIREE CLUB EXECUTIVE BOARD INFORMATION FORM - Page 4 of 4

Recording Secretary:

Address:

Phone: _____ Email: _____

Community Services Committee:

Address:

Phone: _____ Email: _____

Sick and Visitation Committee:

Address:

Phone: _____ Email: _____

How many members are in the club? _____ Meeting Dates? _____

Club Mailing Address:

Please Make a Copy & Return to:
IAMAW Retirees and Employee Assistance Program
Director Edward Manhart
9000 Machinists Place - Room 305
Upper Marlboro, MD 20772

Office: (301)967-4717

Fax: (301)967-3427



IAM Retiree Club Meeting Sign in Sheet

Name of Club _____

Day _____ Month _____ Year _____

Name	Book/Card Number	Local
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Page ____ of ____

EXPENSE REIMBURSEMENTS

GUIDE TO FILE FOR REIMBURSEMENT

In connection with activist activities, expense reimbursement will be made for properly documented expenses in accordance with the following guidelines.

Please submit a request for approval in advance of the activity or anticipated expenditure.

Please print out Expense Forms, complete and submit within 60 days of incurring the expense. Please keep a copy for your records.

Expense Statements should accompany all reimbursement requests.

On the form state the purpose of the trip or the reason expenses were incurred.
- If necessary, continue on the reverse side of the form.

All activities must be pre-approved by the Retiree Departments Director, and all expense statements must include original invoices.

LODGING EXPENSES

1. Lodging/Hotel/Motel Bill – This bill must show a \$0.00 balance and the method of payment. This is usually displayed on the bottom of the bill with an abbreviated credit card name followed by the last four digits of the card number. For example, AMEX XXXXX1234.

Note:

- Bills submitted with “***will be settled to...***” are not acceptable.
2. Master Accounts, complimentary rooms or staying with family/friends – if you do not have a hotel bill to accompany a travel reimbursement request for one of these reasons, please print “room complimentary” or “stayed at private residence” on the attached Expense Statement form on the Hotel description line.

TRANSPORTATION-RELATED EXPENSES

1.) Airline/ Train travel – Round trip coach airfare is the norm and will be reimbursed with the proper documentation.

All of the below listed items MUST be included with your airline expense reimbursement request:

a) Transportation itinerary

b) All boarding passes (outbound and inbound from destination)

c) Airline “day-of-travel” receipts – should show proof of payment, including method of payment, dates, destinations and amounts. The “day-of-travel” receipt can be obtained from the airline ticket counter or kiosk before boarding the plane.

d) Baggage receipt – If you incur a baggage charge attach the receipt and enter information on the Expense Statement.

e) Ticket change charges – If you change flights, please verify the difference in the old rate and the new rate and/or the service or handling fee charges by:

1. attaching the receipt,

2. entering the information on the Expense Statement

3. AND, providing a written explanation for any ticket changes and charges incurred on the Expense Statement form.

2.) Other transportation-related expenses – Travel expenses such as mileage, tolls, parking, taxi, shuttle and ***vehicle rental**;

**All vehicle rentals must be pre-approved.*

**For reimbursement, the approval and original receipt MUST accompany the vehicle rental expense form.*

**The receipt must show the merchant name, date of the transaction, service provided and the amount paid in full to the merchant, “zero -0- balance”.*

Note: Bills submitted with “**will be settled to...**” are not acceptable. Please use the Description area on the Expense Statement for details of the expense.

3.) Report – please submit a report with your Expense Statement detailing the activities that took place at the meeting, the IAM’s involvement, future activities, etc. Please keep a copy for your records.

VENDOR/CONTRACTOR EXPENSE STATEMENT RETIREE & EMPLOYEE ASSISTANCE PROGRAM DEPARTMENT

_____ DATE SUBMITTED

NAME: (please print) _____

SIGNATURE: _____

ADDRESS: _____

STATE THE PURPOSE FOR WHICH THE FOLLOWING EXPENSES WERE INCURRED

ATTACH ALL ORIGINAL INVOICES, RECEIPTS OR STATEMENTS

EXPENSE/INVOICE	DESCRIPTION	AMOUNT
FEE FOR -- GOODS and/or SERVICES		
LODGING / HOTEL / MOTEL		
TRANSPORTATION EXPENSES RENTAL CAR/TAXI/LIMO/BUS, ETC.		
PERSONAL CAR MILEAGE	# of miles:	
AIRFARE/ TRAIN	FROM: _____ TO: _____ ATTACH ITINERARY, BOARDING PASS & RECEIPT	
AIRFARE/ BAGGAGE CHARGE		
AIRFARE/ FLIGHT CHANGE CHARGE	\$ _____ + \$ _____ = TOTAL AMOUNT DIFFERENCE IN FARE + PLUS CHANGE FEE; ATTACH RECEIPT	
REASON FOR FLIGHT CHANGE (IF NECESSARY, USE REVERSE SIDE)		
MISC.		
	SUBTOTAL -PAGE 1	
	SUBTOTAL -PAGE 2	
	TOTAL EXPENSE STATEMENT	

PRE-APPROVAL IS REQUIRED FOR SOME EXPENSES

Director Manhart

GVP Wallace

VENDOR/CONTRACTOR EXPENSE STATEMENT
RETIREE & EMPLOYEE ASSISTANCE PROGRAM DEPARTMENT

ATTACH ALL ORIGINAL INVOICES, RECEIPTS OR STATEMENTS

EXPENSE/INVOICE	DESCRIPTION	AMOUNT
	SUBTOTAL	

PLEASE ENTER THE PAGE 2 SUBTOTAL ON PAGE 1, WHERE INDICATED.



International Association of Machinists & Aerospace Workers

Dear Retired IAM Sisters and Brothers:

Thank you for your continued support of the IAM Retirees & Employee Assistance Department programs. We owe the highest appreciation for the commitments you have made to build and maintain our organization.

During your work life you remained dedicated to the principles of your union and the labor movement. You endured the struggles so you and your families would be rewarded with a livable wage, a good life and a dignified retirement. The IAM values your contributions and remains committed every day to keep your hard earned benefits such as; Pensions, Social Security and Medicare. The IAM continues the fight every day to stop the attacks of the anti-worker/anti-senior agenda.

In this guide, and on our webpage you will find one of our department flyers; *“Become a Retiree Member.”*

- The inside section addresses IAM members receiving Grand Lodge Pension.

The form is an authorization to deduct \$3.00 per month or more, to be donated specifically to the IAM Retirees Program. If you are able, you may increase that amount. Only the amount you specify will be deducted. You must receive a Grand Lodge Pension to use this portion of the form.

- On the back (opposite) side of the same flyer you will see the form section for “No Grand Lodge Pension”.

Your employer’s monthly pension payment cannot make payroll deductions from your pension. I ask that you kindly consider making a yearly donation of \$36.00 or more if possible by check. Note, you will be asked annually to renew your payment. Your monthly financial support allows our department to continue the fight every day of the year. Please consider your contribution as an investment and to support to your fellow IAM retiree activists.

I assure you, the returns on your contributions are huge. For example, as a retiree if you enroll and travel to the William W. Winpisinger Educational Center to attend a course, the cost of the airline portion alone could exceed more than ten times that of a minimum yearly donation. The Retiree Assistance Program (RAP), Retiree Education and Strategic Program (RESP), IAM Retirees Conferences, materials, literature and many other services are made possible through your help.

On behalf of the IAM Retirees & Employee Assistance Department, thank you for all you do and especially your generous support as we continue to grow this important program. We greatly appreciate your dedication and continuing service to our organization and fellow IAM members.

If you have any questions, please contact our department.

In Solidarity,

Edward Manhart
Director, Retirees & Employee
Assistance Program Department

Office - 301-967-4717
Fax - 301-967-3427

Closing:

This guide was prepared to help our retired members who want to remain active in the I.A.M.

In the I.A.M. Retirees' Department there is a famous long-standing expression, "*you have retired from your job, but not from your union*", and it remains a very true statement today.

We all know very well, being as true loyal union members whether we served as steward, officer or full time staff it wasn't just another job, it's was a principled way of life. So, even while in retirement you are still a union member and part of our great labor movement.

Please read and share the guide for ideas to help establish a retiree club for your fellow members.

Remember you are always welcome to participate in your union. If you are able to assist and interested in helping your union grow, we always need experienced seasoned union members to give testimony on the benefits of union membership. You know the value of a union bargaining agreement in the workplace. Sharing your experience will go a long way as future members seek to join our union.

Please see the "Volunteer Organizing Form" on the following page.

Copy, distribute and post the blank forms on bulletin boards at the Local Lodge and in the shop if possible. Send us the completed forms and we will log them.

You can fill out a volunteer form online at: <https://www.goiam.org/departments/headquarters/retirees-employee-assistance-programs/retired-member-organizing-volunteer/>

IAMAW - Retired Member Organizing Volunteer Form



“PLEASE PRINT CLEARLY”

Yes, I would like to volunteer for Organizing in the IAM.

Name: _____

Address: _____

City: _____ St/ Province: _____ Zip/ Postal: _____

Home Ph.: _____ Cell Ph.: _____

Email: _____

Membership Number: _____ Territory: _____

Local Lodge: _____ District Lodge: _____

Industry/Specialty: _____

Have you assisted in IAM organizing before? (*please circle*) YES NO

I understand that I am providing this information for the purposes of volunteering to participate in IAM Organizing activities and this information will not be used for purposes other than to assist the IAM Organizing department.

Signature: _____ Date: _____

PLEASE RETURN THIS FORM TO:

Retirees & Employee Assistance Program Department
Attn: Director, Edward Manhart
9000 Machinists Place, Room 305
Upper Marlboro, MD 20772
or fax: 301-967-3427

THINGS TO KEEP IN MIND

TERRITORY: _____
(Headquarters, Eastern, Mid-West, Southern, Western, Canada)

DISTRICT: _____ **LOCAL LODGE:** _____

ADDRESS: _____

TITLE: _____
(GLR, DBR, BR, PRES. Etc....)

MEMBERSHIP NUMBER: _____

EMPLOYER: _____

ADDRESS: _____

EMPLOYER PENSION: Y/N _____

UNION PENSION: Y/N _____

DATE OF RETIREMENT: _____

FINALLY:

Now that you are retired, consider joining a **Retiree Club!** Please call the Retiree Department at **301-967-4717** and they can direct you to a Retiree Club in that area. By joining, you can stay active and enjoy the fellowship of other Brothers and Sisters in retirement.



**YOU HAVE DEVOTED
YOURSELF TO YOUR
UNION AND NOW IT'S
TIME TO RETIRE**

**“WHAT YOU NEED TO
DO TO RETIRE”**

We have put together this quick guide to help our members who are getting ready to retire from the IAMAW.

You have worked all these years, and it would be a shame to make a small mistake that could lead to severe consequences. This is only a suggestion that you are welcome to use or not! We have heard many, many stories from retirees who do not have their retiree card, an issue that affects the retiree and his or her family greatly.

The union is obligated to insure our members retire properly and without any hardship. However, we admit that other measures have to be improved to make every member of our union more aware of the individual requirements for retirees.

Take the time to educate yourself by reading the I.A.M. Constitution and following the guide to insure you retire correctly.

The final page includes some things to keep in mind if you ever need any help from the I.A.M. after you retire.

We wish you a happy, long retirement and thank you for your devotion and dedication to this great union of ours.

After you apply for retirement with your employer, remember to also visit your District or Local Lodge to apply for your Retiree Card from the union.

This very important, because if you fail to apply for your Retiree Card and lapse sixty (60) days, you are no longer a member of the IAMAW or entitled to any type of assistance, such as Disaster Relief due to damages to your home.

The second thing you need to do is to request a copy of the latest IAM Constitution. Once you have a copy in hand, you must look up the “**Retired and Exempt Members and Life Membership Cards**” section. Depending on the type of retiree card you are eligible for, you have certain requirements to follow each year in order to remain in good standing.

As a Retiree of the union, you are required to notify the Local Lodge of your current mailing address no later than the first (1st) of March each year. The retiree card is valid as long as the holder also remains on retirement and complies with all applicable provisions of the I.A.M. Constitution.

ANNUAL CHECK PAYMENT

YES, I WANT TO SUPPORT THE IAM'S
RETIRED MEMBERS' PROGRAM

NO GRAND LODGE PENSION

I agree to voluntarily contribute \$3.00 or more per month, from my pension, to support the Retirees' program and improve services to our retired members.

PLEASE NOTE:

I do not have a pension through the IAM National Pension Fund or Grand Lodge, but I will write a check in the minimum amount of \$36.00 or more payable to IAMAW-Retirees Department. I also understand that I will be contacted each year to renew my annual membership donation by my retirees club or the Retirement Department Staff.

Date: _____ DL & LL _____

Name: _____

Address: _____

Male: _____ Female: _____

Email: _____

Check No: _____ \$ _____

Signature: _____

On behalf of our Founding Fathers of this great union, we thank you for your dedication and hope that you will continue to be part of this organization as one of our Retirees.



"The Pit"

Birthplace of the International Association of Machinists, May 5, 1888; Engine pit in old East Tennessee, Virginia and Georgia R.R. Shops, Atlanta, GA.

Robert Martinez, Jr.
International President

Dora Cervantes
General Secretary - Treasurer

Edward Manhart
Director
Retirees & Employee Assistance
Program Department

Join Us

Become a Retiree Member!



**International Association of
Machinists and Aerospace Workers**
9000 Machinists Place
Upper Marlboro, MD 20772

Tel: 301-967-4717

Fax: 301-967-3427

Website: goiam.org/retirees

MACHINIST RETIREES' MOTTO:

**"You may Retire from your job,
but you will never retire from your
Union."**



CONGRATULATIONS!!

Our Mission!

As more of our members retire from this great organization it is important to retain the experience as well as the wealth of knowledge that is departing. We need to establish Retirement Clubs throughout Canada and the United States so we can address topics that affect retirees such as Medicare and Social Security, to organize the un-organized which will continue to strengthen the union and to seek ways to mentor the young machinists into future leadership roles to help us grow this union.

Without your support and experience we cannot succeed in being the greatest Union in America. This is why I am asking you to continue to work to improve the working conditions of our members and future members and assist in addressing the issues that constantly plague our brothers and sisters who have finally reached their golden years of life. You can help make a difference in our future!



CREATING NEW CLUBS

By forming new Retiree Clubs in your area you are at the front line on the issues that are affecting not just our brothers and sisters who are retired but what we have always fought for, protecting those that do not have a voice.

As a Retiree you become our strongest ally to combat the injustices and issues that retirees face each day. You and your club members are the ones standing up when retirement benefits like Medicare and Social Security are being cut.

With a well organized club communicating with other clubs and the IAMAW Retirement Department we can make a difference with the issues concerning us.

BECOME A MEMBER TODAY!

YES, I WANT TO SUPPORT THE IAM'S RETIRED MEMBERS' PROGRAM

GRAND LODGE PENSION ONLY

I agree to voluntarily contribute \$3.00 or more per month, from my pension, to support the Retirees' program and improve services to our retired members.

I hereby authorize the deduction from my pension check of either **\$3.00** per month or more than \$3.00, the amount of \$_____ per month, for donation to the Retirees' Program. I make this authorization voluntarily and understand that I may revoke it at any time.

By this authorization, I am not assigning my monthly benefit, or any portion thereof, to the Union.

Date: _____ DL & LL _____

Name: _____

Address: _____

Male: _____ Female: _____

Email: _____

Signature: _____

Machinist Retirees' Motto:

*"You May Retire From Your Job, But
You Will Never Retire From Your
Union."*

Machinists simply do not fade away when we retire; after struggling together for years to make our workplace better, bonds formed with union brothers and sisters remain strong. Hard work is ingrained in the soul of a Machinist and our sense of duty and community runs deep as well. Unionists don't believe in me; they believe in we, the collective power of a team. That is why our retirees remain involved in their communities: socializing, advocating, mentoring, educating and organizing. We are all about character - the good kind. Morals are entrenched in our souls. The kind of morals that lift us all to greatness. Yes, Machinist Retirees are PROUD TO BE UNION!

Robert Martinez, Jr.
International President

Dora Cervantes
General Secretary-Treasurer

Edward Manhart
Director

**Retirees & Employee Assistance
Program Department**

We ask all IAM Retirees to remain active and involved in their union. Please join an existing IAM Retiree club and help recruit new retiree members. Please work with your Locals and Districts to establish and maintain new IAM Retirees Clubs.

Call: 301- 967-4717 Fax: 301-967-3427
Find us on the web

<http://www.goiam.org/index.php/headquarters/departments/retirees-a-employee-assistance-programs>

For EAP assistance please contact:
301-335-0735
or email - iameap@iamaw.org



Retirees & Employees Assistance Program

**International Association
of Machinist
and Aerospace Workers
9000 Machinist Place
Upper Marlboro, MD 20772**

**"Advocating on Behalf of
our Retired Members"**



Seeking Retirees To:

ORGANIZE

- ◆ Organize retirees in their state
- ◆ Communicate with local lodges
- ◆ Promote establishment of retiree clubs
- ◆ Organize new members into the union to keep us strong

MENTOR

- ◆ Assist other retirees in need through the newly formed Retirees' Assistance Program
- ◆ Share experiences with younger union members and individuals seeking to join the IAM.

EDUCATE

Participate in Retirees Education & Strategy Classes at the William W. Winpisinger Education & Technology Center and receive training regarding Medicare, Social Security, geriatric health issues, safety in the home for seniors, drug & alcohol issues, and geriatric psycho-social issues.

ADVOCATE

- ◆ Communicate the political aspects of Medicare and Social Security to seniors, and dispelling misinformation regarding these critical programs
- ◆ Promote good jobs, a fair economy, workers' rights, responsible corporate behavior, and issues vital to seniors

SOCIALIZE

You may be hesitant to join the Retirees' Program as a coordinator, advocate or mentor because you feel as though you don't have the experience or education to volunteer in one of these capacities. Don't let that stop you! If you are interested, we are here to help you get started with the tools and skills you need.

If you would like to be involved but not in such an active way, join our program to gain the benefits that come with belonging to a retiree club. Retiree clubs allow you to keep in touch with your friends, participate in recreational activities, keep you informed of changing political, economic and social developments and bring special problems of retired workers to your union's attention.

CANVASSING

When there is a job of importance to be done we can count on our retirees to be there when needed. Getting out the information concerning issues pertaining to benefits like Medicare, social security, pensions, etc.



They're ready to canvass the neighborhoods, marching the lines, picketing political offices and politicians by making their voice heard loudly.

VOLUNTEERING WHEN ASKED

Retirees are always ready when the call is called for help! No questions, no excuses just prepared and ready to give a helping hand where ever it is needed. They are the hardest working folks and most of the time willing to work and expecting no payment. The retiree motto is true!!






IAMAW Retirees & Employee Assistance Program Department

9000 Machinists Place
Upper Marlboro, MD 20772

Tel: 301-967-4717
Fax: 301-967-3427

Website: goiam.org/retirees

24/7 IAM-EAP Helpline
301-335-0735

   Machinists Union



WORKER-BASED ASSISTANCE

The central purpose of a union has always been to respond to workers' needs and concerns. Unions have a history of establishing and promoting community initiatives that improve the lives of workers and their families.

Member and Employee Assistance Programs IAM-MAP/EAP

Member and Employee Assistance Programs essentially have the same objective — to assist workers and their families through prevention, intervention, assessment, directed care and follow-up services for problems that adversely impact workers' lives. These programs evolved from a labor-initiated effort to enlighten and educate employers that debilitating personal problems should be approached as any other health care concern. Ideally employers will cooperate with the union equally to tackle the issues of drugs, alcohol, mental and emotional concerns that effect workers' lives, the workplace, and the community at large. Where an employer will work with the union, we have an EAP. Where, the employer will not or cannot participate equally with the union — we have a MAP.

EAP I	Winter 2018
EAP II	Spring 2018
EAP III	Summer 2018
EAP IV	Fall 2018
EAP I	Fall 2018

For actual dates please check:
<http://iam4.me/eteap>

Key Benefits

- Supports our Members and their Families
- Supports our Local and District Lodge Leaders
- Supports our Employers
- Provides Job Protection
- Provides Preventive Care
- Provides Immediate/Crisis Care and Follow-up

Broad Brush Assistance

Assistance is inclusive, attempting to cover all situations, conditions or instances which include:

- Alcohol/Drug Abuse
- HIV/AIDS
- Stress
- Financial
- Violence
- Family Problems
- (Workplace & Domestic)
- Elder Care
- Depression
- Suicide
- Discrimination
- Adolescent, Young Workers Problems
- Legal Problems
- Gambling



Help our members at the front door
before they exit through the back door.

IAMAW Member Employee Assistance Program (EAP) Training



We urge you to educate a willing and responsible member of your bargaining unit to learn the skills necessary to assist our members in need.

Mission of the Program

To address worker-related concerns that are vitally linked to job performance, job satisfaction, quality of work-life, and issues that adversely affect members' lives.

Our goal

To teach and assist IAM-EAP representatives in becoming proactive in guiding members with problems toward a higher quality work-life. Common areas of concern include alcohol and/or drug addiction, depression, excessive debt, mental health disorders, gambling addiction, stress and violence.

IAM - EAP Representatives...

are unique in helping to solve issues before they escalate into problems that often lead to discipline. Statistics show that where effective assistance programs exist, employers see an increase in productivity, quality and efficiency.

What happens when members call?

In most cases, an EAP phone number is posted on the bulletin board at the members' worksite. A union member who has received IAM-EAP training will respond. Once connected with an IAM trained EAP member, confidential assistance will be provided.

What makes an EAP successful?

The key benefit to a successful EAP is the support received from the IAM trained EAP member and the employer in providing preventive care, crisis care, immediate family care, referrals, follow-up care, confidentiality, education and training.

EAPs have been shown to contribute to:

- ▶ Decreased absenteeism
- ▶ Reduced accidents
- ▶ Greater employee retention
- ▶ Fewer labor disputes
- ▶ Significantly reduced medical costs arising from early identification and treatment of individual mental health and substance use issues.



About 1 in 4 adults in the U.S. and Canada has symptoms of a mental health disorder, a substance abuse disorder, or both. Over 75% of the people with these behavioral health disorders are employed!

IAM EAP I Primary Course Topics

- ▶ EAP History
- ▶ Core Technology
- ▶ Disease Concept
- ▶ Intro to Ethics
- ▶ Link to Community
- ▶ Understanding Treatment Centers
- ▶ Broad Brush Issues
- ▶ Enable vs. Help
- ▶ Listening
- ▶ Job Description
- ▶ 12 Step Programs
- ▶ Adolescents and Young Workers: Emerging Issues

IAM EAP II Primary Course Topics

- ▶ Core Technology
- ▶ Disease Concept
- ▶ Ethics
- ▶ Confidentiality
- ▶ Legal Issues
- ▶ Strategic Planning
- ▶ Health Insurance
- ▶ Taking Care of Caregiver
- ▶ Follow-up
- ▶ Drug Testing
- ▶ Suicide Prevention

IAM EAP III Primary Course Topics

- ▶ Stress
- ▶ Depression
- ▶ Addiction
- ▶ Taking Care of Caregiver
- ▶ Presentism/Absenteeism
- ▶ Nutritional Support and Recovery
- ▶ Mental Health and Addiction
- ▶ Cultural Diversity
- ▶ IAM EAP Issues in the Workplace

IAM EAP IV Primary Course Topics

- ▶ Core Technology
- ▶ Advanced Listening Skills
- ▶ Motivational Interviewing
- ▶ Elevating Ethical Awareness
- ▶ Evidence-Based Screening Tools
- ▶ Understanding CEAP Certification

All IAM EAP Education classes are awarded College Credits.



Certifications

Although it is not necessary to be certified to assist our members, we are proud of the fact that the IAMAW is the only labor organization that offers a comprehensive education program in the field of worker/workplace assistance that leads to professional certifications.

Enroll Now

To inquire about enrolling in the IAM EAP Education Program contact the IAMAW Retirees & Employee Assistance Program Department.

Office: 301-967-4717

Fax: 301-967-3427

Procedure To Request Training

A call letter along with the class registration form is sent out to all members of the IAM/TCU Executive Council, Chiefs of Staff, Grand Lodge Representatives, Directing Business Representatives, Business Representatives, Railroad & Airline General Chairpersons, District and Local Lodge Presidents, Recording Secretaries, Secretary-Treasurers, Communicators, and Educators announcing the scheduled dates for the EAP program.

It is the responsibility of the member to obtain time off from work and to get approval from their lodge prior to attending class.

In order to be considered for class, completed registration forms must be received by the IAM Retirees and EAP Services Department by the deadline stated in the call letter.

All program classes EAP I, EAP II, EAP III, and EAP IV are comprehensive and confidential.

The IAMAW Member and Employee Assistance Program is a free confidential service.

Contact the 24/7 IAM EAP Hotline: 301-335-0735 or email iam_eap@iamaw.org

