



TOOLKIT FOR PUBLIC EMPLOYEE LOCALS



LiUNA!
Feel the Power

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PART 1

ENGAGING YOUR MEMBERS AT MEMBERSHIP MEETINGS

The Value of Union Membership

Union membership gives members the power to negotiate collective bargaining agreements that provide them with better pay, benefits and protection from unjust discipline and termination. On average, Union members make thirty percent (30%) more than non-Union workers and are more likely to have a guaranteed pension. This is not common knowledge among the American workforce. LIUNA Locals should better promote Union membership, continue to organize, and grow the Local Union's market share. Union meetings are a key way to accomplish these goals.

Promoting the Work of Your Local

Ways to promote the work of your Local can include sharing success stories, participating in Public Service Recognition Week each May, workplace bulletin boards, newsletters, and social media like Facebook and Twitter and websites. Members should also be informed of the Local Union's relationships with the community, faith groups and allied coalitions.

Member meetings are a key element in bringing members together. It is a forum to:

- Conduct Union business
- Make decisions that will affect Local membership
- Provide information to members on issues and different topics
- Build solidarity

Getting good attendance at member meetings can be challenging. Members always have schedule conflicts, and many do not understand the value of attending meetings. Because of this, Locals have to develop creative ways to increase member participation. These can include raffles, guest speakers and food.

Training and Education

Locals can provide training to stewards and members at Local Union meetings, lunch and learns in the workplace, and classes after work or on the weekend. Areas that should be covered are:

- **Stewards' Rights**—protects stewards when representing members. Locals can teach that stewards are on the same level as management when representing management; they cannot be harassed, intimidated, disciplined, or held to a higher standard when performing their duties as a steward.
- **Weingarten Rights**—the law allows for Union members to request Union representation if they suspect they will be disciplined when called into a meeting with management.
- **Collective Bargaining**—having the ability to negotiate a contract gives members protection in the workplace and looks out for the best interest of employees. Negotiating a contract results in the collective bargaining agreement that determines wages, hours, overtime and the grievance process, among other important benefits.

Tackling Labor's Challenges

In today's society, Unions are often not valued for a number of reasons. Anti-Union politicians and their business supporters use Unions as a scapegoat for budget deficits by blaming the problem on Union wages, benefits and pensions. Their campaign has unfortunately been somewhat successful in messaging the negatives of the labor movement.

To counteract this negative image of Unions, members have to be educated on the value of Union membership, including the rich history of the labor movement, the benefits provided to Union members, and the importance of growing Local Union membership. Keeping members abreast of the challenges Unions face through anti-Union legislation, Union busting, and conservative organizations can help in promoting the value of Union membership and in engaging active members. Locals can talk to new employees at the employer's new employee orientation meetings or invite new members to the Local Union for a new member orientation meeting. Locals can identify new stewards and workplace leaders to be your ambassadors to your members. Finally, Locals should engage in constant outreach to all of the members all of the time, not just when the CBA is up for negotiation, to ensure they understand the value of Union membership.

Resources

LIUNA has a Stewards' Module online which enables LIUNA leaders to teach stewards their role in eight training segments that can be taught in 30-90 minute time frames. The module is available at <http://www.liuna.org/pedsteward-training>.

PART 2

REVIEW AND REVITALIZE YOUR POLITICAL PROGRAM

Public employees elect our bosses who, in turn, approve our Union contracts, so a strong political presence is necessary for LIUNA's public sector Locals. Additionally, we can and should use our current legislative and political programs to protect our members from conservative, anti-Union attacks.

Review Recent Elections

Recent elections have been devastating for public employees and their Unions. Immediately after being elected in 2010, Wisconsin Governor Scott Walker rolled back decades of public sector labor law by passing Act 10 and basically eliminating collective bargaining for public employees, resulting in as much as a seventy-five percent (75%) decrease in Union membership in that state. That law in Wisconsin emboldened anti-Union politicians in Michigan and Indiana, which then passed Right to Work laws, as did Wisconsin in 2015. Once Unions lose at the ballot, we almost always lose on the issues. Conservative politicians and their corporate allies like ALEC and Koch go after public sector Unions first and then take on private sector Unions and have won far too often in the past few years.

Bills and ballot initiatives have been introduced and moved in many states to attack public employees in the following ways: make them so-called Right to Work states; eliminate release time; cut pensions; ban dues deductions; make bargaining public; cut unemployment insurance; contract out government work; cut workers compensation; require annual recertification of Unions; and more. An attack on Unions in one state often spreads to other states, so our members need to be aware of what is at stake and how these bad bills can affect them. Once anti-Union politicians are elected, they will attack public sector Unions. We need to work before the election to prevent this.

We need to educate our members about what they can and should do to educate our members and build their political program. These tasks can include the importance of registering to vote, knowing which candidates and ballot initiatives to support, encouraging everyone they know to support pro-worker candidates and initiatives and oppose those that harm us, contributing to our PACS so we have a strong voice in the political process, and actually getting out to vote.

A First Step: Voter Registration

To ensure there are enough Laborers to affect the political process, the first step is ensuring that all of your members are registered to vote. LIUNA set political participation goals at our 2011 Convention: recruit ten percent (10%) of your Local Union membership to be member activists; ensure that eighty percent (80%) of members are registered to vote; ensure that eight percent (80%) of members actually vote. You can check the Labor Action Network (LAN)¹ to determine if your members are registered to vote and how they are voting. You can hold a non-partisan voter registration drive at your Local Union or work with a non-partisan group like the League of Women Voters and your public employer to hold a voter registration drive in their workplace. You can create cards to hand out in the workplace asking your members to sign up to become activists and invite them to a special meeting to learn more and to involve them in the upcoming election.

¹ Business Managers can request a log-in for the LAN from their Regional Manager

These steps will not only allow your Local to meet its Convention mandated goals, but they will also create a strong political program to protect your members as well.

Getting Ready for the Next Election

Today the majority of state houses and governors are controlled by anti-Union Republicans. Start now to get ready for the next election. Don't wait to start your political program.

- **Forming or Filling Your Political Action Committee (PAC)**—If you do not have a PAC, form one. Many public Locals do not have a PAC even though a PAC is one of the most effective tools to influence policies in your city, county, state and federal sector. Once you have established your PAC, educate members on why the PAC is important and how the PAC helps them as members (gives them a voice in the political process, helps hold politicians accountable and helps with contract negotiations and approval). Ask your members to give significantly to the PAC. Hand out PAC cards at your membership meetings and organizing drives. Consider conducting a survey to get member input on the PAC.
- **Form alliances and verify your allies**—Ensure that the Democrats who have traditionally been there for public employees are still on your side through a detailed candidate questionnaire and in-person meetings to hold them accountable. Shore up or build Republican support. Ask candidates if they will appoint Laborers to key positions such as PERBs, PERCs, pension funds, DOT and DOL. Work with LIUNA's construction Locals, other Unions and community and civil rights groups that support your candidates and issues.
- **Choose which races to focus on**—Focus on the state and local races, which are critical, especially for the public sector. Have a plan for educating and engaging your members on races at all levels. Determine where you can be most effective to target resources (i.e. one city vs statewide; state offices vs. Congress).
- **Recruit Laborers**—Locals should also recruit Laborers to run for office at all levels, including city, county, school board and state races, where those politicians approve our contracts and pass laws governing our public employees.

LIUNA Tools

- LIUNA's Legislative and Political Department staff can assist with compliance with LIUNA's Convention Resolutions, PACs and other resources.
- VOICE modules on politics and organizing are available from the LIUNA Organizing Department
- Public sector information on LIUNA website: <http://www.liuna.org/documents-and-resources>

PART 3

EDUCATING MEMBERS ON CURRENT LABOR FIGHTS

To ensure that our members understand what's at stake with the attacks on public employees and their Unions, it is important to know who is behind the attacks, what the attacks are, and what successes we can model.

Types of Attacks on Public Workers and Their Unions

Anti-Union politicians are attacking public employees and their Unions on all fronts. The attacks can be legislative, executive orders issued by the governor, on the ballot, in the courts, and at the local level. ¹ The type of attacks range from basically eliminating collective bargaining, public sector RTW, dues deductions, pension attacks, privatization of government services to non-Union contractors, annual recertification of Unions and bans on release time for Union activities.² Because these attacks can occur at various access points—legislature, governor, courts, ballot, local level - even Unions in fair share states with a pro-Union governor or legislature have to be ready for and knowledgeable about these type of potential attacks.

Who is Behind the Attacks

A number of anti-Union groups backed by corporate millionaires and billionaires are leading the attacks on the public sector. They have several goals: public sector Unions are consistently among the top donors to Democrats, so if these groups can weaken the Unions, they weaken the entire Democratic and middle-class agenda; force Unions to spend money fighting Union attacks even when we win, in order to deplete our funds so that we cannot spend on other things like elections;³ and weaken public Unions so that governments will outsource work to the private sector, which leads to more revenue for corporations but less accountability for the public.

The groups most commonly behind the attacks on labor are:

- **ALEC**,⁴ the American Legislative Exchange Council, funded by a number of corporations, and its new local government offshoot ACCE, the American City County Exchange. ALEC and ACCE provide model anti-Union legislation to state and local legislators to introduce in their respective states, which is why an attack in a liberal state looks very similar to one in a conservative state. More information on ALEC and ACCE can be found on www.alecexposed.org.
- **Koch Brothers**—David and Charles Koch⁵ are billionaire brothers with a comprehensive conservative agenda to hurt the middle class.
- **National Right to Work Committee and Legal Defense Foundation**—These groups are leading forces in the lawsuits to overturn agency fees, including *Harris v. Quinn* (U.S. Supreme Court, 2014), and *Friedrichs v. CTA* (Supreme Court, 2016), and *Janus v. AFSCME*.
- **Regional anti-Union groups** like the Goldwater Institute (Arizona), the Mackinac Center (Michigan), the Freedom Foundation (Oregon and Washington) focus their efforts on certain states or parts of the country. Importantly, the anti-Union forces are generally connected and interwoven in their attempts to pass RTW and other attacks on labor wherever they can.⁶

How to Educate and Empower

- Public sector Unions have had some successes over the past years fighting attacks against them in various locations.
- Common Threads to Successes—In every instance of a labor success against these attacks, the different Unions worked together, had a simple coordinated message, and put in a constant and tremendous amount of effort.

LIUNA Tools

- VOICE modules—available from LIUNA Organizing Department
- Public sector information on LIUNA website: <http://www.liuna.org/documents-and-resources>
- Invite labor educators to your membership meetings

¹ Anti-Union groups are still pushing these attacks in conservative cities, towns, and counties in fare share states. Although attacks at the local government level are generally pre-empted by state law, they still force the Unions to spend resources, time and money, to fight them. Anti-Union groups like the Freedom Foundation are directly targeting union members.

² The national AFL-CIO tracks these legislative attacks in each state and LIUNA Locals can contact the LIUNA Legislative and Political Department for updates.

³ Examples are the California ballot initiatives, which the Unions typically win, but spend millions of dollars to keep the status quo.

⁴ Some of ALEC's corporate donors can be found here: <http://www.prwatch.org/news/2011/07/10887/cmd-special-report-alecs-funding-and-spending>

⁵ Their father, Fred Koch, was an oil tycoon and one of the first funders of the original Right to Work movement, with its racist roots. See <http://www.aflcio.org/Blog/In-The-States/Right-to-Work-for-Less-Laws-Have-Racist-Origins>

⁶ See <http://www.prwatch.org/news/2014/06/12498/who-behind-national-right-work-committee-and-its-anti-Union-crusade>

PART 4

USING LABOR HISTORY TO CREATE A STRONGER LOCAL

Unions now more than ever need to educate their members on labor history in general, LIUNA history and the history of your Local because of the attacks on the public sector. There are a number of ways to teach labor history: during member meetings, stewards' training, lunch and learns on the jobsite, social media, and YouTube.

Influence of Wealthy CEOs and Corporations

History repeats itself as seen in the late 1800s with robber barons like John D. Rockefeller, Andrew Carnegie and J. P. Morgan, who had great wealth. Their priority was to pit workers against one another because workers were easily replaced with the large immigrant population. It was a divide and conquer tactic that kept the working class poor. Workers made low wages, had no benefits, and worked long hours in an unsafe work environment. Unions fought back through strikes, work slowdowns, and protests with support of the community. Unions are still dealing with the same type of individuals and organizations such as the Koch Brothers, ALEC, and the MRTWF, who spend hundreds of millions of dollars to support anti-Union campaigns and to support politicians that pass legislation to dismantle Unions.

Examples of Labor History

Lessons learned from past and present fights are that Unions have to educate members and the public on the importance of Unions. It is because of Unions that we have collective bargaining rights, the eight hour work day, overtime pay, paid vacation, and Social Security, to name a few. There were incidents such as the Haymarket Riot in 1886 when workers rallied in support of the eight-hour day. Supporters were jailed and event put to death. In 1911, the Triangle Shirtwaist Factory Fire took place in New York where 146 mostly female workers perished in a fire. Workers were locked in a building, and firefighters were unable to reach them because the ladders could not reach the upper floors. Incidents such as these prompted Unions to fight even harder for job safety and benefits for workers.

Public sector labor history is repeating itself now as well. Starting in the 1960s, a group of anti-labor professors and lawyers led by Sylvester Petro began to attack the idea of public sector Unionism. Petro was the architect of the attack on agency fees in the 1977 U.S. Supreme Court case, *Abood v Detroit Board of Education*. Although the Court unanimously upheld agency fees, Petro's brief was the roadmap for future attacks by the National Right to Work Legal Defense Fund and current Supreme Court Justice Samuel Alito, the primary Justice trying to overturn fair share fees today. Relatedly, the 1974 sanitation and police strike in Baltimore saw the supposed pro-labor mayor and governor turn their backs on the Union for political reasons, inspiring other Democratic politicians to do the same to their public employee Unions. Also, in response to the Baltimore strike, Ralph de Toledano, a noted conservative, wrote the book *Let Our Cities Burn* (with a foreword by noted racist U.S. Senator Jesse Helms) which further vilified public Unions. Today the fight continues as Unions work to elect Union friendly politicians, form coalitions with other organizations and community groups, and fight for workers' health and safety to fend off the attacks from anti-Union groups.

Labor and Civil Rights

The Labor movement and Civil Rights movement are linked because both support those who lack a voice in the workplace and in our society. Unions understood the value and effectiveness of solidarity. One example of this is how Unions fight continuously against states that have passed Right to Work (RTW) laws or states that are attempting to pass RTW laws. RTW has a racist history, starting with its founder Vance Muse, who felt that white women and men would be forced into organizations with blacks that they would have to call brothers or sisters or lose their jobs. This racist sentiment continues today with employers using immigration status as a tactic to cause division among workers.

Fred Koch, the father of Charles and David Koch, worked with Vance Muse on RTW laws. Both men support conservative anti-Union think tanks, such as the Foundation for Economic Education, that remain in existence. The Koch brothers finance and support another group that hurts workers, the American Legislative Exchange Council (ALEC), and continue to practice the same tactics as their father did.

Labor Law History

When the National Labor Relations Act (NLRA) was enacted in 1935, Unions were empowered because the rights of employees and employers were protected, and collective bargaining and organizing were encouraged. Some of these benefits were limited when the Taft Hartley Act of 1947 was passed by a pro-business, conservative controlled Congress. In 1959, Wisconsin was the first state to provide collective bargaining rights to public employees, resulting in public sector growth. Five decades later, in 2010, Wisconsin voters elected anti-Union Republican Governor Scott Walker, an anti-Union supporter, who ended collective bargaining for public sector employees. In 2015, Governor Walker also signed a Right to Work bill into law, striking another blow against organized labor in the private sector. Michigan, Indiana, Kentucky and West Virginia followed soon after. Labor law history is important to know because we elect politicians that can change the landscape of the Union movement with the stroke of a pen.

Failure to educate our members, our families, and the general public on labor history and the relevance of Unions could take us back to a culture of the haves and the have nots.

LIUNA has materials available to educate our Locals and their membership on these issues, including LIUNA's 100th Anniversary magazine and the New Member Orientation Guide.

PART 5

PROMOTING THE GREAT WORK YOUR MEMBERS DO

In order to show the value that our public employee members bring to our communities, we must promote our good work and ties to our communities.

Opportunities to Promote Your Members' Work

There are a number of ways that you can promote the great work your members do to protect and serve our communities. These can include celebrating Public Service Recognition Week (PSRW) which occurs every year in May. You can involve your management by asking the mayor, city council or governor to issue a proclamation supporting your public employees. You can send a message to your public employees from the Local thanking them through mail, email or local newspaper. You can take part in your local school's career day and have your members talk about the work that they do to serve their community and mention that Union membership is a key part of the job. You can ask management to start an awards program to recognize workers who go above and beyond on the job.

Other opportunities beyond PSRW are to use websites and social media to show your members at work cleaning our parks, filling our potholes or picking up trash. Photos of our members at work remind the community that the Union serves those who serve our neighborhoods. You can invite politicians to visit your jobsites or Union meetings to meet your members and interact with them to hear how proud they are to serve our communities.

The Union can have a Member of the Month campaign to recognize great work our members do to serve our communities and promote on social media or in the local newspaper or employer newsletter. By proactively reaching out to local journalists to share stories about members, you can help educate the public and elected leaders about the importance of the work they do and the value of Union membership.

Finally, you can effectively brand your Union membership through using the color orange. If your members wear lanyards to work or can wear a pin or button, give them a LIUNA lanyard or button. Incorporate the LIUNA look into everything the Union produces, from newsletters to business cards, to show strength and solidarity.

LIUNA Tools

- PSRW Toolkit—<http://publicservicerecognitionweek.org>
- LIUNA Strategic Communications Department—7 Tools
- LIUNA public sector materials available at <http://www.liuna.org/documents-and-resources>

PART 6

ORGANIZING AND GROWING YOUR LOCAL UNION

Overview on Organizing

Growing the size and strength of our public sector membership is a top priority of LIUNA and should be a goal of every Local Union with public sector members. In every state and in every Local, organizing must be a daily priority.

What does being a strong union mean? It means effective representation and the capacity to make improvements at work. Successful external and internal organizing campaigns will result in strong Local Unions, bargaining units, and contracts that provide better wages and benefits to our members. That increased union strength will help protect Local Unions from increased political and corporate attacks on public sector unions, collective bargaining rights and pensions. It will also provide a greater voice in future contract negotiations, contract enforcement and political involvement.

Fair Share

Considering the ever-present and growing attacks on public sector unions, LIUNA Local Unions must have a plan to address the threat of Right to Work in each and every Fair Share fee state. Member education is paramount in this fight and should be part of a daily initiative in member communication.

To best be prepared for any legislative or legal changes to fair share fee laws, the Local Union should effectively communicate and educate the benefits of Union membership now, so that any changes to the law will not affect members' attitude or position of Union support.

Member education and mobilization can play a lead role in solidifying Union support. By utilizing stewards, volunteer organizing committees, and members for action teams, the Local Union is identifying and using Local Union leaders to help shore up Local Union loyalty and support.

These member leaders can play a key role in thwarting legislative attacks, developing a pro-active political program, and building community wide support against Right to Work.

A realistic goal for each Local Union is to identify and recruit one new leader a month.

Right to Work

In Right to Work states, LIUNA Local Unions must be vigilant in recruiting, signing and servicing new and existing members. Internal organizing must be a daily priority of every Local Union.

By developing New Member Orientation programs and utilizing stewards and other member leaders, Local Unions should contact and communicate with every new worker in the earliest stages of employment. Orientation and education should clearly highlight the benefits of Union membership with an immediate ask to sign up and join the Union.

An analysis of members and non-members of each bargaining unit should be completed. For long-term employees who have not joined or opted out of the union, there should also be similar outreach to communicate with each worker the benefits of joining with a request to join the union.

A realistic goal for each Local Union is to sign up ten (10) new members a month.

Long Term Organizing Plans

Though there is immediate work most Local Unions can do right now to sign up new members and identify new member leaders, all Local Unions should be thinking about and developing long-term organizing plans to increase the size and strength of their Locals.

A market share analysis should be performed to identify potential new organizing targets. Serious discussions should be held about choosing strategic organizing targets, undertaking organizing campaigns and Local Union capacity in order to be successful.

Long term plans should also include goals for internal organizing and member leader recruitment with long term vision of how to channel their strength and power into making the Local Union stronger politically, more active in their community, and more helpful during contract negotiations.

Resources

Resources to help with these goals include the LIUNA Organizing Department and their research services, LIUNA Education Department, Regional Organizing Funds and Union Plus.

PART 7

COMMUNITY OUTREACH BUILDING SOLIDARITY

Community outreach is a critical component to ensure that LIUNA's public sector Locals have the broadest base of support to ensure continued growth, solidarity during contract negotiations, and protection during political attacks. It's important to engage the community by fighting for and winning issues important to Union and non-Union workers. If you can support a community ally's specific interest, they will in turn support your interests as a part of a broader agenda of workers' issues. The courts and legislatures who determine the rights of organized labor are sensitive to public sentiment. Our public employers will also think twice on a contract issue if they know that the community is watching. Community allies can provide a unique voice in addition to labor's to build support from politicians, neighbors, and others.

Most Americans do not belong to a Union, so getting our message to them through allied groups is a critical step to ensuring broad support for our fights to help workers.

Examples of Successful Community Outreach

- **Civil Rights Allies**—the Labor movement shares the goal of the civil rights movement for inclusion, tolerance and diversity. We can fight with them to protect voting rights. We can jointly share in Dr. Martin Luther King Jr.'s support for striking sanitation workers in Memphis and his opposition to so-called Right to Work, and contrast the racist origins of Right to Work in the 1930s and 40s promoted by Vance Muse and the Koch Brothers' father.
- **Charities**—Public sector Locals have backed charities such as homeless organizations, food banks and cancer groups. Laborers can donate time and money, march in rallies supporting their causes, sponsor teams to raise money, and attend their meetings to discuss shared attacks on our causes due to budget cuts. Laborers should wear their LIUNA orange at these events to publicize our Union's support for these great causes.
- **Business Allies**—Many businesses, especially small businesses, stand to lose business if their regular customers, our Union members, fall on hard times. This can happen if a city, county, state, federal or provincial government is cutting jobs, cutting pay or benefits or imposing furloughs. Reach out to local businesses near where your members work, places like restaurants and gas stations, and ask if they will support your members by doing things like placing a placard or sign in the window stating they support your Local specifically or public employees generally.

PART 8

PARTNERING WITH LIUNA CONSTRUCTION LOCALS

LIUNA's Diverse Make-Up

LIUNA is a diverse Union, representing workers in almost every conceivable job and occupation. Though traditionally a Union that represents workers in the construction industry, LIUNA has a long and rich history of organizing, servicing and representing thousands of public sector workers. Our construction members and public sector members are stronger when they both work together.

LIUNA has exclusive construction Local Unions, exclusive public sector Local Unions, and hybrid Local Unions that have both construction and public sector membership. How each of these different types of Local Unions communicate and operate with each other is worth discussing and improving.

Why Is Partnering with Construction Locals Important?

Union members are currently under attack in both the United States and Canada. These attacks come in many different forms, sometimes targeting the public sector (like bargaining rights and pension reform) and sometimes targeting the construction sector (like prevailing wage). Other attacks target all Union workers (like Right to Work). When LIUNA can harness the political power and voice of all our members, we are stronger in fighting any attack on workers.

There should be constant communication between public sector, construction and hybrid Locals about legislative and political attacks. There should be open discussion of allies and enemies, direct attacks, and upcoming battles. Helping one another in their fights strengthens all of us. Political endorsements should be coordinated.

Mutual aid and assistance can be provided to each Local Union in contract negotiations, picket lines and disputes with employers.

Public construction is important to most LIUNA construction Locals. The relationships LIUNA develops with decision makers and awarding agencies is important to winning that work and maintaining high market share. These relationships are often with the same employers and decision makers that our public sector membership works for. These relationships can prove invaluable to both public sector and construction Local Union leaders.

What You Should Be Doing

Communicate regularly with your Regional Office and District Council and keep them aware of current public sector issues, including issues and updates from your Local Union.

Develop relationships with other LIUNA Local Union leaders and staff in your area. Maintain regular communication of issues affecting your membership. Coordinate political lobbying and campaign election work. Help other LIUNA Locals when asked for assistance. Ask other LIUNA Locals for assistance when needed.

PART 9

MUNICIPAL FINANCE RESEARCH RESOURCES

Public sector Unions often face challenges when government employers claim they don't have enough funds in the city or municipal budget for pay raises during contract negotiations or claim they need to cut jobs. Government employers also launch unsubstantiated attacks at public sector workers and their unions based on manufactured budget problems. The sources in this toolkit help arm us with the information needed to fight back and rebut these claims with hard data.

The sources listed below generally fall under the purview of the Division of Municipal Finance for corresponding municipalities. Municipal governments either grant taxpayers ready access to this data or it is available through a union request for information (RFI) or FOIA request.

- **The Government Finance Officers Association (GFOA)**—provides data on financial indicators for more than 700 municipalities. There is a marginal fee for the data, but the information is made available in spreadsheet for on CD. (See Financial Indicators Database) <http://www.gfoa.org/financial-indicators-database>.
- **City and Town Council Salary and Fringe Benefits Survey**—provides salary and fringe benefits of local officials.
- **Local Government (State and Local) Finance Webpages**—provides relevant vendor contract information (costs and fees).
- **Municipal Charters**—provides data on municipal governing procedures that could potentially be used to challenge policy or regulation.
- **Municipal Fiscal Years based on Cities and Towns**—provides detail on spending, fees and costs included in the municipal fiscal year.
- **Property Tax Revenue Data and Cap Report**—provides a picture of the property tax being paid on local level.
- **Municipal Salary Survey**—provides salary data on municipal positions held.
- **Governance Structures of Municipalities**—helps identify key departments such as regional and local authorities that issue bonds, municipal departments and special districts. Additional data provides municipal vendor lists.
- **Comprehensive Annual Report (CAFR)**—annual report of spending and financial health of municipality or city. This data can represent aggregate figures for towns and districts comprising a city or municipality.
- **Comprehensive Annual Financial Report for Pension Funds**—annual report of investments, investment returns and employer and employee contributions for public sector defined benefit pension funds.

Resources

1. Harvard Trustee Network—<http://hausercenter.org/iri/about/tlf>
2. FixLA.org—A campaign to reduce fees paid by Los Angeles run by public sector unions. www.fixla.org
3. Chicago Laborers Negotiate to Reduce Fees—<http://www.chicagotribune.com/business/ct-confidential-kurt-summers-0225-biz-20150224-column.html>

PART 10

RETIREMENT SECURITY

Overview

Many public and private employers have eliminated their defined benefit (DB) (guaranteed) pension plans and others have reduced them and shifted to providing retirement benefits through 401(k) savings plans or other defined contribution (DC) plans. In these plans, the employer only contributes a fixed amount to the plan each year. Plans like 401(k) plans shift the investment risk and responsibility to individual workers and typically reduce costs to the employer but increase the cost, through fees, to the individual employee.

There are other significant benefits to a DB plan versus a DC plan:

- Retaining a DB Plan is likely to cost state and local governments less over the long term.
- DB plans typically provide survivorship and disability payments. DC plans do not.
- DB plans help to attract and retain employees.
- DB plans typically have higher investment returns than DC plans.
- DB plans pool the risk to retirees rather than force individual risk on retirees.

Mobilizing on Retirement Security

The economic crisis and the Wall Street excesses and corporate abuses that drove it have put a secure retirement at risk for everyone. Instead of cutting pension for public employees and forcing more retirees into poverty, LIUNA leaders are working together to help deliver retirement security to more people and to protect the benefits we worked so hard to gain.

However, those who want to erase the hard-won benefits of public sector union members are more organized than ever before. Many of the organizations that are attacking our funds are funded by hedge fund managers and private equity managers, some of the very same service providers that solicit investments from our public sector pension funds. For example, in October 2012, Bruce Rauner, then candidate for the governor of Illinois, retired from GTCR, the private equity firm that he chaired. Despite managing billions of dollars for public sector pension funds, now-Governor Rauner made destroying defined benefit funds for Illinois public sector workers the cornerstone of his campaign.

In addition to the desire to destroy public sector Unions, many times these same investment firms are charging excessive fees to invest money on behalf of the public sector funds. Trustees of these funds are not seeing a correlation between higher fees and better fund performance. The higher percentage of money that goes towards fees means less benefits for employees over the long term.

Preserving pension funds and other benefits for public sector employees is the core of the work that LIUNA leaders do.

Traits of Effective Public Employee Union Leader for Retirement Security

- A LIUNA Public Employee Leader is an effective advocate for the preservation of defined benefit plans and other public employee benefits.
 - o Leader is aware of potential legislatively mandated studies or changes to public employee benefits including pension plans and health care plans

- o Leader knows and works with other public employee union leaders in her geographic area in regards to preservation of public employee pension plans
 - o Leader knows who her pension fund trustees are and holds them accountable
 - o Leader works to get effective individuals appointed to state, municipal and local pension fund boards.
- A LIUNA Public Employee Leader is a vocal advocate to legislators as to the preservation of public employee benefits.
 - o As part of a LIUNA leader's regular interaction with elected officials, she makes sure that she is advocating for the preservation of DB plans.

Attachments:

1. Harvard Trustee Leadership Forums, "Seven Attributes of Highly Effective Pension Trustees" <http://hausercenter.org/iri/wp-content/uploads/2012/05/Seven-Attributes-One-Page-Summary.pdf>
2. Public Pension Defense Toolkit, NCPERS <http://www.ncpers.org/promotingpensions>
3. Ranking Asset Manager, 2014 Report by the American Federation of Teachers. <http://www.aft.org/sites/default/files/rankingassetmanagers0115.pdf>