

EXECUTIVE COUNCIL

THE EXECUTIVE COUNCIL IS THE governing body of the NALC between national conventions and is responsible for determining the direction of the union. In accordance with Article 9, Section 11 of the *NALC Constitution*, the Council consists of the president, executive vice president, vice president, secretary-treasurer, assistant secretary-treasurer, director of city delivery, director of safety and health, director of life insurance, director of the Health Benefit Plan, director of retired members, the board of trustees and the national business agents.

At this writing, the Council had convened nine times since the 2008 National Convention, with an additional meeting scheduled August 4-6 just prior to the 67th Biennial Convention in Anaheim.

Meetings of the Council are an important opportunity for national officers and key staff to focus on the important issues facing letter carriers. NALC leaders learn about the latest developments from the field and tackle significant issues of national importance. Often, staff members in attendance report on departmental activities. By meeting as a group, Council members gain the perspective needed to make important decisions on behalf of the membership.

Here's a summary of council meetings during the past two years:

April 24-25, 2009 (Las Vegas): The specific topic addressed at this meeting concerned the Annuity Trust Fund. The Council passed two resolutions approving two amendments to the ATF.

July 2, 2009 (Teleconference): The pending election for national officers of the AFL-CIO was discussed. The Council voted to endorse the candidacy of Richard Trumka for president of the AFL-CIO.

The Council discussed plans on how to prepare for National Reassessment Process-related grievances.

President Bill Young also addressed the council concerning his impending retirement and the

ascension of Fred Rolando to the NALC presidency.

July 20-22, 2009 (Washington, DC): The Council heard reports on the state of the economy and the Postal Service, as well as health care reform and the Employee Free Choice Act.

A detailed discussion of the convention site committee report on potential sites for the 2014 convention led to the selection of Philadelphia for the 69th biennial meeting.

Plans for the national MDA bowlathon were discussed. Other agenda items included legislative updates, COLCPE, task force updates, training needs and the Leadership Academy.

September 1, 2009 (Teleconference): The AFL-CIO's Working America campaign to enact comprehensive health care reform was discussed along with the NALC's involvement in getting legislation passed.

October 15, 2009 (Teleconference): The Council discussed the lease for the Health Benefit Plan building, which was up for renewal, and voted to pursue an amendment to the lease. The Council also discussed NRP, assignment of city delivery, DRT training, Article 12, MIARAP, FSS and COR.

November 24, 2009 (Teleconference): The Council passed a resolution concerning the rates for the NALC Health Benefit Plan for employees and staff, based upon the staff plan actuary's analysis.

The Council also received a report on President Rolando's participation in the Rutgers University Center for Research in Regulated Industries workshop on "The Future of the Postal Service."

An update on health care reform was also given to the Council.

December 21, 2009 (Teleconference): The purpose of the meeting was to address technical amendments needed for submission of the Annuity Trust Fund to the IRS. The Council also discussed the upcoming state chairs meeting.

March 19-22, 2010 (Washington, DC): The USPS Action Plan for the Future, which had just recently been unveiled, was discussed at length by the Council. The Council also received an update on how the NALC was responding to Congress and our members concerning the content of the action plan.

An update on the provisions contained in the health care reform bill was given, followed by a vote by the Council to endorse the bill.

The Council also discussed upcoming contract negotiations and elected the trustees and officers of the Nalcrest Foundation.

The Council also took a break from its meetings to attend the National Postal Museum's panel discussion to commemorate the 40th anniversary of the Great Postal Strike of 1970. President Emeritus Vincent R. Sombrotto was one of three speakers on the panel.

June 9, 2010 (Teleconference): A thorough report on needed updates to the electrical system and the sidewalks at the NALC Headquarters building in Washington was given to the council. The necessary repairs were approved by the Council.



NATIONAL FOOD DRIVE

IN ITS 18TH YEAR IN 2010, THE NALC National “Stamp Out Hunger” Food Drive reached two milestones—setting a new one-year record of 77.1 million pounds of food, and breaking through the 1 billion-pound benchmark for total contributions collected since the nationwide drive began in 1993.

The drive, an icon of anti-hunger efforts in America, is relied upon yearly by food banks and pantries in all 50 states, Puerto Rico, Guam and the District of Columbia in their efforts to provide for needy families.

The second Saturday in May remains the principal day in the calendar year for making Americans aware of the devastating issue of hunger and, more importantly, is the one day they do something about it.

This is especially critical for children and elderly. Late in 2009, the Department of Agriculture announced that food insecurity in this nation—where families do not know for certain whether they will have sufficient nutrition available that day—had risen from 35 million people to 49 million people in just one year.

The drive is relied upon as the principal source of donations to feed the hungry over the summer months when other donations are at a low point and children are in special need because of the suspension of school lunch programs. In 2009 and 2010, the situation worsened as the poor economy lingered, and many families who never faced hunger found themselves seeking assistance.

In 2010, 1,444 NALC branches participated in the food drive on the second Saturday in May—May 8—and the result was another major victory in the struggle to stamp out hunger, 77.1 million pounds.

Tampa, Florida Branch 599 captured top honors with more than 2 million pounds collected, followed closely by their neighboring branch, West Coast Florida Branch 1477. The top branches in 10 membership categories were announced in the July *Postal Record*, and the top branches in each category will receive a plaque at the convention. They also will receive 1,000 cans of soup from Campbell Soup Company for the food bank or pantry of their choice.

The National Rural Letter Carriers’ Association came on board as a national partner of the drive this year and its encouraged support from many rural letter carriers across the nation. Also joining in were thousands of other postal employees, retirees, Auxiliary members and civic volunteers.

The drive is another example of the long tradition of carriers unselfishly devoting their time and energy to help those less fortunate in their communities.

Campbell Soup and the U.S. Postal Service continue as the major national supporters of the drive, again joining together to provide more than 126 million full-color postcards for delivery to postal customers a few days before the drive.

Campbell Soup also provides a major lift in nationwide publicity, arranging this year with Feeding America, the nation’s food bank network, for public service announcements (PSAs) featuring Hollywood stars Courteney Cox and David Arquette; “American Idol” host Ryan Seacrest, and National Hot Rod Association drag racing star Ashley Force Hood. In 2009, the famed Harlem Globetrotters did a PSA for the drive. In addition, there were numerous full-page advertisements in major magazines like *Sports Illustrated*, *Parade*, *People*, etc.

Again as a major supporter was Cox Target Media, operator of Valpak Directing Marketing Systems, which mailed more than 44 million envelopes promoting the drive, along with inserts for further support. Other partners were the AFL-CIO, United Way Worldwide and local United Ways, and Feeding America.

The Postal Service gets a great deal of positive publicity from the drive—the best it receives all year—and has strongly supported the drive since its inception. That policy has been bolstered every year by the strong backing from Postmaster General Jack Potter.

Carriers feel a great sense of pride and accomplishment in being the conduit between their postal customers and the many needy families and homeless individuals that benefit from this voluntary effort.

Coordinated since its inception by NALC Director of Public Relations Drew Von Bergen, the drive has attracted widespread television, radio and newspaper publicity, including major promotions the past two years on ABC-TV’s “Good Morning America.”

NALC Headquarters provides branches with a special DVD to show members and others in the community, and camera-ready artwork for use in making posters, T-shirts and newspaper advertisements. In addition, bulk supply copies of a full-color NALC National Food Drive poster were available for purchase from NALC Headquarters at cost. A favorite in all cities is the Campbell Soup inflatable soup can.

The NALC owes much to famed “Family Circus” cartoonists Bil and Jeff Keane for their special creations for use by the NALC in the drive. The artwork is freely used by local branches in developing fliers that are handed out at schools, churches and groceries, and in making T-shirts, banners and billboards.

Throughout most of the nation, the drive is an example of labor-management relations at its best, with carriers and postal management working hand in hand to gather and distribute food donations to their local food banks, pantries and shelters.

A food drive workshop will be held at the Anaheim convention on Thursday morning.



HEROES OF THE YEAR

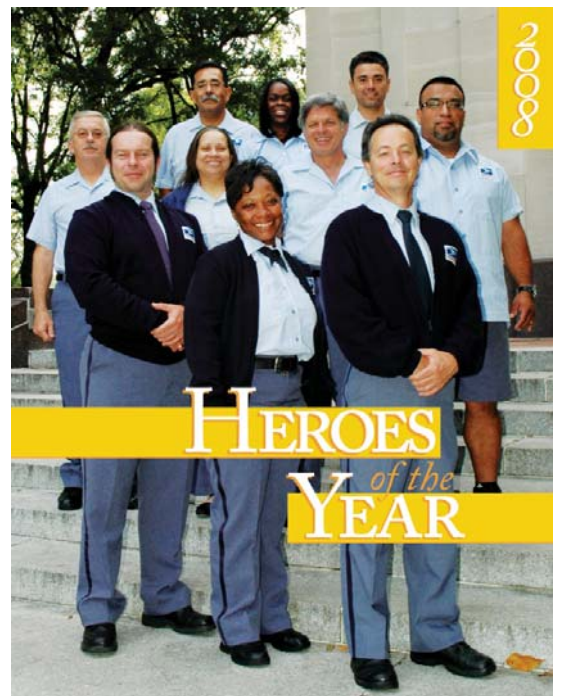
EVERY DAY IN AMERICA, LETTER CARRIERS can be found in every neighborhood of every city delivering the nation's mail. Every day, the nature of the job puts them in constant contact with the American public. They are the last public servant to make regular rounds and come into daily contact with the customers on their routes.

As a result, letter carriers are often the first to arrive at the scene of a crisis—an accident, a disaster, a crime—and the first to offer assistance. Letter carriers also have a direct view of the needs and problems in a community—a family without fuel or food, a child without a coat or shoes, a senior citizen in need of medical or social services.

The NALC is proud of the heroism and good deeds performed by our members each year. To acknowledge these actions, in 1974, the NALC established the Heroes of the Year awards to pay tribute to letter carriers who perform selfless and heroic acts, ignoring the risk to themselves. In 1978, the Humanitarian of the Year award was initiated to honor letter carriers for significant, sustained, personal contributions to a worthy cause. A Branch Service award was added in 1986 to recognize an NALC branch involved in ongoing community service. Finally, in 2002 a fourth category was created—a special Carrier Alert award to select an individual letter carrier who does not risk their own life, but who, due to their alert observations of conditions and people on their routes, save customers' lives.

Each year a panel of independent judges—representing the labor movement, community service organizations and emergency public services—reviews Postal Record features and items published in its "Proud to Serve" pages. In 2008 and 2009, judges were Shelby Hallmark, director of the U.S. Department of Labor's Office of Workers' Compensation Programs; Jordan L. Biscardo, vice president, AFL-CIO Community Services Liaison, United Way Worldwide; and Fire Chief Richard Bowers, of Montgomery County, Maryland. The judges select a National Hero, a National Humanitarian, three Regional Heroes, and a special Carrier Alert award winner each year out of hundreds of accounts. No Branch Service award was presented in 2008 or 2009.

The heroes are invited to Washington, DC, to receive their awards in person. The official ceremony is held at a hotel near national headquarters in conjunction with a luncheon reception. The heroes reception has become an important occasion in the nation's capitol attended by members of Congress, government dignitaries, the postmaster general and other postal officials, AFL-CIO affiliated labor leaders, and community service representatives, along with NALC officers. The guests honor NALC's proud tradition of service by joining the heroes, their family members,



and local branch presidents for this special awards presentation. Each of the winners receives a certificate and a monetary award.

NALC believes it is important to bring the outstanding activities of our members to the attention of the American public. For that reason, every effort is made to publicize what each hero did and to highlight the annual heroes reception itself. Local news media are informed, voice and video interviews are distributed to radio and television outlets, and the festivities are taped for transmission to TV stations in the heroes' home cities. In 2009, Oprah Winfrey honored a group of NALC heroes on her television show.

The National Heroes for 2008 were **Alan Girard, Rick Quinonez, Gilber Rangel, Tonya Joseph and Karen Hill of Greater East Bay, California Branch 1111** for helping to rescue scores of people from a three-alarm fire that engulfed a six-story senior citizen high-rise located next door to the post office.

David Lundy of Branch 936, High Point, North Carolina, became the 2008 National Humanitarian for the year that he and his wife spent working to ensure that an elderly customer on his route was placed into a nursing home where she could receive the food and medical attention that she desperately needed.

Eastern Regional Hero of 2008 **Paul Gereffi, a member of Branch 2550, Ft. Lauderdale, Florida**, noticed two men struggling behind an office building on his route—one of the men covered in blood. After calling the police, and with the help of a passerby, Gereffi subdued an unhappy employee who had attacked his boss with a steak knife.

Dean Dunkel of Cedar Rapids, Iowa Branch 373 was honored as the Central Region Hero of 2008. Dean was on his way home from work in a rain storm when he saw a vehicle ahead of him hydroplane. The car came to rest upside down, nose first, against a storm drain. With water flooding the car, dean helped the driver escape to safety.

Western Regional Hero of 2008 **Raymond Rivera Jr. of Branch 421 San Antonio, Texas**, was off duty when he eyed a pair of pit bull dogs escape their owner and attack two small girls. Rivera managed to pull off one of the dogs that had latched onto the face

of one of the girls. Raymond managed to hold down the dog for 45 minutes until animal control arrived. The injured girl needed more than 100 stitches and hours of reconstructive surgery.

The special Carrier Alert award for 2008 was presented to **Rhonda Russell, a member of Branch 36 New York, New York**. Rhonda noticed that an 85-year-old customer was receiving an unusual number of credit card solicitations even though she was confined to a nursing home. She reported the problem to investigators who found that numerous credit cards had been activated in the woman's name. More than \$12,500 had also been pilfered from the woman's savings account, and a second mortgage had been applied for on her home. Police caught and charged the identity thief with crimes including grand larceny.

At the 2009 awards ceremony this past September, **Tim Foote of Branch 500, Harrisburg, Pennsylvania**, was honored as the 2009 National Hero of the Year. Tim noticed a neighbor's house engulfed in flames, raced to the home, broke in, and crawled on the floor until he found his neighbor who was unconscious on the living room floor. Tim managed to pull the man safely out of the house as the roof and walls collapsed around them.

Emmanuel Anim-Sackey of New Jersey Merged Branch 38 became the 2009 Humanitarian of the Year for his efforts ongoing efforts to collect used clothing, shoes, and school supplies and send them back to his native Ghana—one of the poorest countries in the world.

Eastern Regional Hero **James Patrick of Branch 451 Johnstown, Pennsylvania**, was walking his route when he noticed thick black smoke pouring from the eaves of a church. He rescued the Roman Catholic pastor and his secretary who were completely unaware that the church and the rectory were consumed in flames.

Matthew Polnow, a member of Rockford, Illinois Branch 245, earned the Central Region Hero Award when he noticed a three-vehicle accident as he was delivering his route and found that one of the victims was wheelchair bound in a van that was quickly filling with smoke. He maneuvered the wheelchair ramp into place, unhooked the seat belts and dragged the terrified woman to safety.

Fortunately, **Seattle, Washington Branch 79 member Victoria Wells**, the Western Region Hero, was paying attention as she was delivering on her route. When she arrived at a home that served as a day care, Wells noticed flames shooting from the roof. She called 911, rang the doorbell, and pounded on the door. Victoria decided to enter the building where 10 children were napping in the basement. Grabbing one little boy, Victoria instructed the children to follow her up the stairs and out of the home to safety.

UNION PRIVILEGE BENEFIT PROGRAM

IN 1986, UNION PRIVILEGE WAS LAUNCHED BY THE AFL-CIO as a benefit program for union members and their families. Designed to increase the purchasing power of millions of union workers, the program continues to be administered by the AFL-CIO Executive Council, of which I am a member.

Revenue generated from Union Privilege programs help support the priorities of the labor movement and working people, priorities that may not coincide with those of corporate America—notorious for keeping all of the profits to themselves.

I am proud to report that not only do our members carry the card in large numbers, each and every officer of the NALC uses the UnionPlus card as well. In 2008, approximately 45,000 NALC members held a UnionPlus MasterCard. In 2009, that number decreased slightly to 42,000 members, partly due to long-term unused cards being canceled, and partly due to a reduction in available credit. Although 2009 and 2010 have been financially difficult times for this country, letter carriers continue to earn a bi-weekly paycheck, which helps us keep our credit-worthiness.

Why do letter carriers carry the card? Where else can members receive a union advocate for any dispute regarding the card? Only at Union Privilege. Where else can you get help when disaster, disability or illness strikes? Only Union Privilege provides grants to its members who find themselves in need. There are more than a few letter carriers who were fortunate enough to have their credit card payments made for them by Union Privilege in the last few years while they recovered from a debilitating illness or injury.

Union Privilege is not just about a credit card. It's about mortgages—with great interest rates and low cost loan fees, along with free grocery gift certificates at closing; it's about wireless discounts through AT&T (the only union wireless service); it's about discount car rentals, auto sales and motor club services, to name a few.

In addition, the children of many letter carriers have Union Privilege to thank for their part of the \$150,000 in scholarships that are awarded annually. In 2008, three children of letter carriers received scholarships: Molly Gilmore, the daughter of Daniel Gilmore, a member of Branch 18, Southeast Massachusetts Merged; Holly LaCount, the daughter of Diana LaCount, a member of Branch 348, Eureka, California; and Joshua Helsel-Raymond, the son of Andrew Raymond, a member of Buffalo-Western New York Branch 3.

Union Privilege Scholarship winners in 2009 include Holly LaCount (who won a four-year scholarship); and Luke Seppi, stepson of Mark Coggin, a member of Branch 4819, Bowie, Maryland.

A complete list of every benefit you and your family are entitled to is at unionprivilege.org. Why not take a look at your union won discounts before you make another purchase?

The 2009 Special Carrier Alert Award was presented to **James Brown Jr. of Virginia Beach, Virginia Branch 2819**. James stepped onto the porch of an elderly couple who lived on his route to the sounds of someone calling for help inside the home. Climbing through an unlocked window James quickly located the woman who had fallen and broken her hip while she was trying to care for her husband—a stroke victim.

COMPENSATION DEPARTMENT

NALC'S COMPENSATION DEPARTMENT, headed by Assistant to the President for Compensation Greg Dixon, provides information and advice to the membership on the Federal Employees' Compensation Act (FECA) and its administration by the Office of Workers' Compensation Programs (OWCP). The department assists national officers who represent members in their claims before OWCP and who deal with the Postal Service in FECA-related matters. It also provides direct representation for members who file appeals with the Labor Department's Employees' Compensation Appeals Board (ECAB).

In June 2009, the NALC and Postal Service settled a national-level grievance regarding the Postal Service's application of its National Reassessment Process (NRP). NRP is a management program that was devised to reassess all current limited-duty job offers and to reassess how future limited-duty job offers are made. The NALC maintains that NRP cannot compromise injured employees' rights under 546 of the *ELM*. After many months of negotiations the parties' three-part settlement addressed the NALC's contentions and solidified the contractual rights of affected letter carriers. The parties agreed that NRP does not change management's obligation to provide limited duty to injured employees and it does not change the provisions of *ELM* 546. The resolution cleared the way to process grievances that had been held in abeyance pending the outcome of that national case. Retired Compensation Director Ron Watson has been appointed as an assistant to the president and has been tasked with overseeing NRP grievances.

In May 2010, the NALC settled its lawsuit regarding medical records by entering into a settlement agreement with the Postal Service and the USPS Office of Inspector General (OIG) that imposes significant new restrictions on OIG agents and postal inspectors when they seek to obtain confidential medical information about employees from the employees' doctors or other personal health care providers. The restrictions imposed by this settlement should prevent OIG agents from intimidating and coercing doctors and other providers who would otherwise choose to maintain the confidentiality of sensitive information. The settlement will also ensure that union advocates can prevent the Postal Service from using improperly obtained information as evidence against employees in arbitration cases.

The Compensation Department continues to provide information and advice to the membership through *The Postal Record*, the *NALC Activist*, the compensation section of the NALC website and national convention workshops. The department's comprehensive CD-ROM, including the Injury Compensation Manual, remains available for purchase by the membership or may be downloaded from the NALC website. Direct access to FECA laws and OWCP's procedure manuals have also been added to the NALC website.

Training is an important part of the Compensation Department's responsibilities. The department has provided OWCP presentations at each Leadership Academy. The focus of that training included a history of the FECA and its underlying social compact, the FECA's structure and regulatory underpinnings, and how the FECA intersects with the National Agreement. The department also remains available for consultation with NBAs regarding OWCP training.

The Compensation Department works closely with the Contract Administration Unit on grievances that deal with OWCP issues. It also assists the CAU with USPS handbook and manual changes and Postal Service programs to ensure that they are in compliance with the FECA.

All national business agents have been directed to ensure that OWCP compensation cases are handled at the local and regional levels rather than at NALC Headquarters—with the understanding that national business agents can seek assistance from the Compensation Department when such assistance is needed.

Members and branches are also requested to refrain from contacting the Compensation Department except in serious emergencies, so that the department can devote time and energy to legislative and administrative matters affecting the FECA and the union as a whole, as well as to national-level appeals before the ECAB.

STANDING COMMITTEES

Band Committee

Pam Donato, Minneapolis, MN Br. 9 (chair)
Charles Sexton, St. Louis, MO Br. 343
Ernest Phillips, Cleveland, OH Br. 40

Convention Site Committee

Jane Broendel, Secretary-Treasurer (chair)
Howard Komine, Honolulu, HI Br. 860
James Korolowicz, Utica, MI Br. 4374
Glen Norton, Las Vegas, NV Br. 2502

Scholarship Committee

Jacqueline White, Los Angeles, CA Br. 24 (chair)
Sandra Laemmel, Detroit, MI Br. 1
Art Muoio, Rochester, NY Br. 210

Uniform Committee

Myra Warren, Director of Life Insurance (chair)
Thomas Gavin, Scranton, PA Br. 17
Stafford Price Jr., Chicago, IL Br. 11

Nalcrest Committee

Fred Rolando, President (chair)
Gary Mullins, Vice President
Jane Broendel, Secretary-Treasurer
Matthew Rose, South FL Br. 1071
Don Southern, Lakeland, FL Br. 1779
Tom Young, Garden Grove, CA Br. 1100

Retirement Committee

Ernie Kirkland, Retirement Director
Ron Brown, Royal Oak, MI Br. 3126
James Dolan, Philadelphia, PA Br. 157
McDowell Frazier, Los Angeles, CA Br. 24
Norman LeFrois, Rochester, NY Br. 210
Doug Gullely, Columbus, OH Br. 78
John Walsh, Albany, NY Br. 29
Steve Martinez, Phoenix, AZ Br. 576
Clarence Smekofski, St. Paul, MN Br. 28
Cheryl Stately, Minneapolis, MN Br. 9
Ken Stephens Sr., Montgomery, AL Br. 106

PUBLIC RELATIONS

PUBLIC RELATIONS AT THE NALC encompasses a broad spectrum—both the traditional role of interacting with the news media on issues of importance to letter carriers, the union movement, and the U.S. Postal Service, but also the many activities that members provide to their communities and to their nation.

Director of Public Relations Drew Von Bergen handled external media contacts and a number of community service functions in addition to his responsibility to write the *NALC Bulletin* under the direction of my office.

In the past year, a major portion of the media relations activity has involved efforts of the Postal Service to cut back on service to their customers through a reduction in delivery days, efforts by this union and others to encourage Con-

gress to change the pre-funding requirements on USPS for retirees' health care, and other actions to bolster the Postal Service's financial situation in light of the recession and technological changes in the communications arena.

In addition, there is extensive public relations involvement regarding the annual NALC National Food Drive, which provides local branches, as well as the Postal Service, a great deal of favorable publicity. The latest video, Internet and satellite technology have been used to promote the food drive and other NALC events. (Additional information is included in a special section on the food drive in this report.)

The annual Hero of the Year awards ceremony, held each fall, continues to garner considerable newspaper, radio and television exposure. NALC sends

out a satellite video news release about the event to both radio and television stations in the hometown areas of the winners as well as to national and regional networks.

Branch and state association officers need to keep abreast of ways to improve relations with television, radio and newspapers reporters. The Communications and Public Relations staff are available to assist branches and state associations on media relations strategy including assistance in garnering publicity when they come to Washington to lobby Congress on issues critical to letter carriers.

Prior to and during the Anaheim convention, the NALC will keep local and national media up to date on newsworthy activity and headline speakers that could attract national and local television, radio and newspaper coverage.

POSTAL EMPLOYEES' RELIEF FUND

THE POSTAL EMPLOYEES' RELIEF FUND (PERF), created by postal unions, management associations and the U.S. Postal Service in 1990 continues to serve the needs of active and retired postal employees who suffer damage to their homes and property caused by major natural disasters and fires.

Over the past two years, the fund has completed processing all initial requests for assistance from Hurricane Katrina and the other devastating hurricanes that struck the Gulf Coast in 2005, leaving only a handful of late requests to be processed from those storms. However, the numerous grants awarded due to that damage has had a great impact on reserves of the fund, leaving it at this time with just about \$2 million, down from almost \$15 million before Katrina grants began to be issued.

As a result, any new major disaster would deplete the fund and require emergency steps to restore monies for grants.

More than 1,500 applications for assistance were received from devastation caused by Hurricane Katrina and other hurricanes and more than \$8 million in grants were issued.

The fund receives the vast majority of its money from payroll checkoff donations through the annual Combined Federal Campaign, although some individual and organizational donations are also received.

The fund has made thousands of payments to individuals—including hundreds of letter carriers—who have requested assistance due to losses from earthquakes, hurricanes, tornadoes, flooding, major wildfires and other natural disasters.

Generous contributions from postal employees and others through the Combined Federal Campaign have allowed the fund to maintain a stable base of resources. An inspired effort for CFC donations is needed this fall to continue the fund PERF's work.

During 2009, the fund acted on applications from 473 individuals throughout the United States and U.S. jurisdictions issuing relief grants totaling \$1,446,000.

In this year, as of May 1, the fund has received applications from 160 individuals, and by that date had issued relief grants totaling \$306,000.

Drew Von Bergen, NALC's director of public relations, had served as this union's representative on the Executive Committee of the Fund—which handles the day-to-day operations of the fund—for the past 20 years, since the founding of PERF, and served as chairman of the Executive Committee for eight years. With his retirement on June 30, I have appointed Linda Giordano, special assistant to the president for community services, as NALC's representative on the Executive Committee.

Further information is available on the Fund's website, postalrelief.com, or by calling 202-408-1869.

COMMUNICATIONS DEPARTMENT

THE NALC COMMUNICATIONS DEPARTMENT has a challenging mission: to keep NALC members informed about issues affecting their jobs and their families, and to encourage them to embrace the union's goals and join in union activities.

To achieve that aim, the department produces *The Postal Record* magazine; maintains the NALC website; provides creative, editorial and publications support for other departments; and prepares materials for national conventions.

As it becomes a hub for all the NALC's official communications, the department strives to provide a measure of consistency in the union's message and in the overall quality of the content the union produces.

The monthly *Postal Record* magazine remains the department's flagship. It is a unique resource, without peer in the American labor movement in size and scope.

The official journal of the NALC, the 123-year-old *Record* is even older than the union itself. Its pages concentrate on the concerns of letter carriers, in the workplace, in the legislative and political arena, and in the context of the broader labor movement.

The emphasis is on straightforward information, so members can make their own informed decisions. It also details the union's objectives and explains how members can help make the NALC stronger.

Still, there is an increasing reliance on the NALC's Internet-based communications to deliver vital information to the membership quickly, through both daily news post-

ings on the NALC website and use of the e-Activist Network. The department continues to explore new ways to exploit both the Internet to spread the NALC message and generate enthusiasm among the rank and file for the union's agenda.

Further, the expertise and talent gathered in the Communications Department gives other NALC Headquarters operations the ability to create professional quality publications in-house at a substantial savings over contracting outside vendors to produce items ranging from

greeting cards and invitations to major works like the *JCAM*. And it was announced in April that the Communications Department would take over production of the *NALC Bulletin* upon the retirement of NALC Director of Public Relations Drew Von Bergen.

THE DEPARTMENT AT WORK

Sean McCormally retired in April after 18 years with the staff, the last four as the Communications Department's director. As this report was being prepared, the search for a new director was underway.

Four individuals currently comprise the Communications Department staff:

- Mike Shea, who, at this writing, serves as the acting director of communications and as managing editor of *The Postal Record* in addition to his ongoing duties as designer and as NALC's official photographer,
- Joe Conway, the Internet communications coordinator, serving as web editor and the e-Activist Network's overseer,
- Jenessa Kildall, the department's editorial assistant, and
- Rick Hodges, who joined the department in May as a writer-editor.

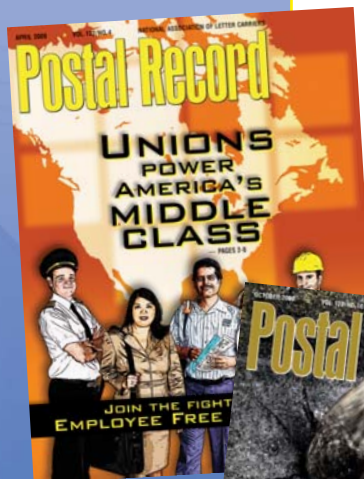
These four individuals do most of the research, interviewing, writing, design, layout, production, proofreading and photography for department projects.

As acting director, Mike Shea's duties include coordination with other Headquarters departments and national officers in production of print materials and assuring the department continues to meet the high standards of excellence letter carriers both expect and deserve.

Along with initiating story ideas and cover concepts, Shea handles the production schedule for the magazine and other projects. He serves as the senior editor for copy generated by other staff members both inside and outside of the department. Shea, who has been with NALC for eight years, also continues to handle the magazine design and layout work.

Conway, the Internet communications coordinator, joined the department in late 2005 as assistant editor and writer. In March, he began a transition to focus primarily on the union's website at nalc.org and to serve as the technical operator of the e-Activist Network. And as a member of the Communications Department, Conway continues to write news and feature stories for the magazine and to edit copy.

Editorial Assistant Kildall joined the staff in August 2007. In addition to such traditional office duties as handling calls and incoming mail, she is responsible for full production of many of the "inside" pages of the magazine, including the popular Proud to Serve section, the Customer Connect section, as well as



increasingly frequent writing assignments and editing copy.

Writer-Editor Hodges was hired in May. A seasoned and experienced scribe, he has hit the ground running, already putting together a number of news and feature stories for the magazine, not to mention tackling the editing and layout of the *Record's* large Branch Items section.

WEBSITE AND E-ACTIVIST NETWORK

NALC started its website in rudimentary form in 1996. The current format was launched in August 2001, based on three guiding principles: to be attractive, focused and content-rich.

The union's leadership remains strongly committed to a first-rate website, and the department strives to keep the site timely and straightforward. While the website's primary goal is to provide information to members, it is important to remember it also serves as a public relations tool, actively portraying to a wider audience the important contributions letter carriers make to their communities every day.

The website's five main sections—News, Departments, Postal Issues, Community Service and About NALC—contain subsections with hundreds of pages of information and thousands of supporting documents, with much of the material in portable document format (PDF).

More than 8,000 visits a day—300,000 visits a month—demonstrates the level of interest in NALC's website. Contract-related PDF documents account for the majority of downloads, with some being viewed hundreds of thousands of times per month. A visitor will also find a number of images and video clips.

In April, in response to the Postal Service's ill-conceived action plan for the future, with its focus on cutting Saturday mail delivery as the best way to achieve financial relief, the department created a "response" site (nalc.org/saturday), which not only gives members up-to-date information on the NALC's battle against any sort of delivery reduction, but provides the public a reasoned counterpoint to the Postal Service's erroneous claims that going to five-day mail delivery is all but a done deal.

Improvements and alterations are under constant review, and the Communications staff works closely with members of other departments to bring information on the site current and to make that information easier to locate and use.

In addition to the website, the union communicates with members through the NALC e-Activist Network. This e-mail-based system is designed to alert members about pending legislation and labor campaigns,

provide background information, and spur quick action when necessary. Members who provide an e-mail address—either by signing up on the NALC's website or on paper—receive updates on postal-related legislation, NALC's political agenda and similar materials.

When the time comes to act, the network allows participants to send personalized e-mails directly to members of Congress and other targeted individuals.

Since August 2008, NALC's e-Activist Network has sent more than 200 national, regional, state-focused and even city-focused messages related to postal reform and the battle against cutting mail delivery service, the 2008 and 2010 elections, and the fight against "do not mail" registries. Contrast that 200-message number with the 65 or so sent between 2006 and 2008, and it's clear that there is a growing reliance on e-communications as yet another tool in the NALC's legislative and political arsenal.

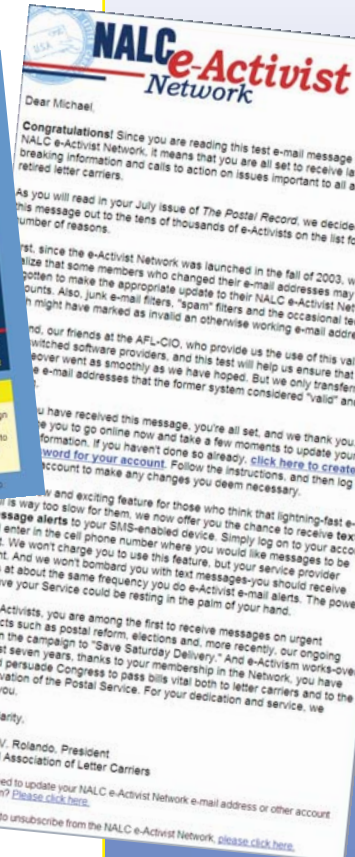
The e-Activist Network is a benefit of the NALC's membership in the AFL-CIO. This summer, the federation switched service providers, from the Get Active network to the Wired for Change network. Director of Information Technology Steve Czechanski provided invaluable assistance in making sure that the transfer of contact information from the old system to the new one was smooth and seamless.

THE POSTAL RECORD

In planning articles, *The Postal Record* staff works directly with resident officers and coordinates with other Headquarters departments. Most writing is by department staffers, but Director of Public Relations Drew Von Bergen has contributed numerous articles and Chief of Staff Jim Sauber, his assistant Stephen DeMatteo and other staff members provide essential material for many items.

The magazine tries to maintain a balance of content to cultivate solidarity and to appeal to letter carriers who are concerned about their life at work and the lives of their brothers and sisters in the NALC. For example, one touching report described how a California carrier's customers rallied around him as he recovered from a harrowing pit bull attack.

On the political side, a continuing series of stories helped members understand what was truly at stake for working Americans in the 2008 congress-



COST OF POSTAL RECORD

	4/06 to 3/08	4/08 to 3/10
Publishing	\$2,815,716	\$2,872,696
Postage	\$1,426,381	\$1,507,959
Total	\$4,242,097	\$4,380,656
Number of issues	23	23

sional and presidential elections. A special December 2008 issue served as a special thank-you to all the members of the NALC Carrier Corps by listing each participant's name. The March 2009 cover story, "What the #@% Happened?" analyzed the financial meltdown and the global recession. Several major articles were devoted to the NALC's place in the fight for meaningful health insurance reform. And in the last few months, the magazine's emphasis has focused on the fight to preserve six days of mail delivery service a week.

Here are some highlights of articles featured in the magazine since the Boston Convention:

August/September 2008—Special issue included coverage of the 66th Biennial Convention, the union's endorsement of Barack Obama for president, and President Young's testimony before Congress on the Universal Service statutes.

October 2008—The last magazine before the November 2008 general election focused letter carriers' attention on issues important to their pay, benefits and working conditions, as well as to our employer, the USPS.

January 2009—An analysis of what letter carriers can expect from Washington with a labor-friendly president and majorities in both houses of Congress.

April 2009—The cover story, "Unions power the middle class," showed that letter carriers have a real stake in making sure the Employee Free Choice Act gets passed.

May 2009—A detailed look at the looming battle to pass real, effective health insurance reform. Also, President Young testified before Congress about the importance of preserving mail delivery six days a week.

June 2009—The issue provided members full coverage of the union's rap session in Las Vegas, which included a detailed roll-out of the Modified Interim Alternate Route Adjustment Process.

July 2009—Full report on the food drive, which collected 73.4 million pounds, ran for 26 pages and included 148 photos.

August 2009—As President Young retires, President Rolando takes the reins and preps the membership for the fight to preserve six-days-a-week mail delivery.

October 2009—"Busting myths" about health insurance reform, the Employee Free Choice Act and Postal Service finances was the eight-page cover story.

November 2009—The issue contained a report on the union's victory in passage of a bill granting one-time financial relief to the Postal Service, as

well as coverage of the annual Heroes of the Year awards ceremony.

December 2009—Letter carriers as "Caretakers of the Community" was the issue's focus, with touching accounts of members who coordinate sending supplies to troops serving overseas, a carrier who climbs mountains to raise awareness for autism, and a story about a Kansas member for whom the food drive is a year-round mission.

January 2010—The traditional "year ahead" issue took a look at the status of the mail in 2010 and beyond, as a Postal Service facing grim projections on mail volume weighed its options for its future business model, including rumblings of a push to cut out Saturday mail delivery service.

March 2010—"Reinventing the Last Mile: Meeting America's changing needs" encouraged letter carriers to apply our imagination to striking a balance between the new and the old as the key to good jobs for us and good service for all Americans.

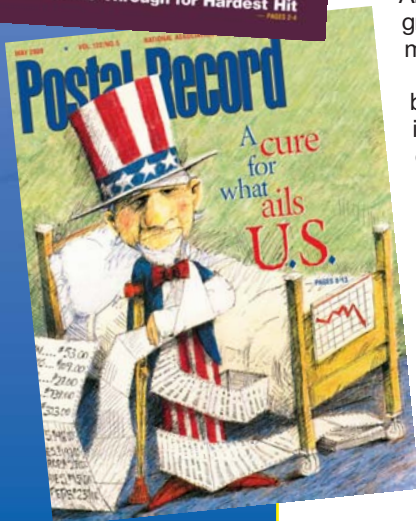
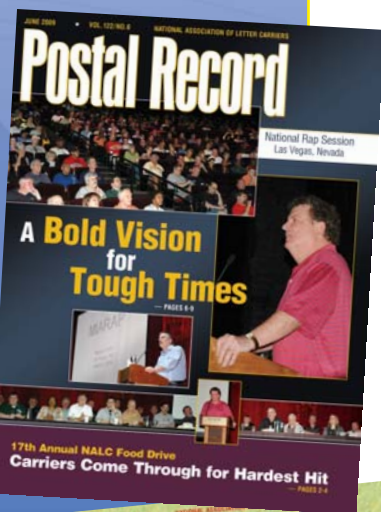
May 2010—"Standing Tall: Then & Now" offered a look back at the great Postal Strike from several points of view—some previously classified—while comparing that difficult time to the challenges faced by today's letter carriers to save Saturday delivery.

On a practical note, while maintenance of the website is obviously a daily project, it may be less apparent that the production process for *The Postal Record* also is continuous—when one issue "closes," work begins on the next. Consequently, copy deadlines are staggered so the staff can manage the workload. This means, for instance, that Branch Items, State Summaries and Retiree Reports are due by the 10th of the month preceding publication. Both copy and photos may be sent by e-mail to postalrecord@nalc.org. Only authorized scribes (branch, state and retiree) with advance written permission from their branch or state president may submit written items. Branch officers may submit photos and Proud to Serve material.

Aggressive cost-saving measures, a hallmark of the Communications staff for the past two decades, have mitigated sharply increased postage and the rising cost of paper and other production costs.

With a page count of 1,672 for the biennium, the 23 issues produced over the last two years have averaged close to 73 pages. Outsized issues for the biennial President's Report, the annual food drive coverage, and special COLCPE recognition drove the average up. (A combined issue appearing after national conventions reduces the total to 23 for the two-year period from the expected 24.)

By laying out the pages of the magazine on personal computers and becoming increasingly sophisti-



COST OF NALC BULLETIN

	4/06 to 3/08	4/08 to 3/10
Printing, photos, etc.	\$268,522	\$288,209
Postage	\$336,489	327,311
Total	\$605,012	\$615,520
Number of issues	60	45

cated in handling digital images, the staff continues to absorb work that many of our sister unions contract out to commercial designers, typesetters and printing company employees.

The numbers bear out the direct value of this "insourcing"—the 61 cents per copy figure for the 2006-2008 biennium compares to 70.3 cents per copy in 2000-2002.

CONVENTION RESPONSIBILITIES

The Communications Department produces the *Officers' Reports* book, the *Financial Reports* book, and the *Pocket Guide*, and helps produce specialty items, like the Contract DVD, all distributed at the convention. Work on this biennial effort begins as early as December of the year preceding the convention and continues until weeks after the convention closes.

While the convention is in session, the department writes and produces a daily four-page summary, the *Convention Chronicle*. It is produced on site—writing, photo taking and selection, and layout—and printed overnight at a union printer for distribution the next morning to the delegates.

Shea, Conway and Hodges have been assigned to the Anaheim convention to handle these responsibilities and provide other support as needed. The department staff will also conduct a workshop in Anaheim for branch editors and web designers. The workshop will conclude with the presentation of the Branch Publications Awards for outstanding newsletters and websites, and individual efforts.

Immediately following the convention, the department produces a special "convention issue" of *The Postal Record* to share convention business with the full membership. Later, the staff assembles the *Convention Proceedings*, a verbatim account mailed to every branch represented at the event.

LEADERSHIP ACADEMY

All members of the Communications Department play a role in the training and development of the union's future leaders at the Leadership Academy. Kildall visits each Leadership Academy class at two of its sessions to review project reports. She, along with Director of Education Jamie Lumm, Director of the Information Center Nancy Dysart and Research Analyst Stephen DeMatteo, edits the reports and provides feedback to the class members. Meanwhile, the other staff deliver a presentation on creating effective branch publications and websites.

IN-HOUSE SERVICES

The department provides in-house desktop publishing and design services, which allow Head-

NALC Bulletin
National Association of Letter Carriers
August 2010

DON'T BE MISLED!
Only Congress Can Authorize The End of Saturday Service
NALC 15-Day is the Wrong Way Web Site Launched

Workers Memorial Day Set for April 28

GOOD JOBS SAFE JOBS NOW

NALC Secretary-Treasurer Broendel Honored

Ohio Letter Carriers Lobby Capitol Hill

Seventh COLA Has No Accumulation Yet

State Chairs Strategize Against USPS Plan

NALC BULLETIN

Nearly 13,000 copies of the *NALC Bulletin* are mailed to branch officials and shop stewards for posting on NALC bulletin boards at postal stations in order that all NALC members can be informed quickly of important matters concerning their union and on legislative and other government issues affecting them.

The *Bulletin* is published usually on a bi-weekly basis, although more frequently if needed. There were 23 issues in 2008 and 22 issues in 2009.

Each *Bulletin* is also posted on NALC's official website, nalc.org, and remains available throughout the year as a source of information on NALC affairs.

On a regular basis, the *Bulletin* provides the latest information on the status of key legislation, major arbitration awards and special activities of the union, frequently utilizing artwork and photos to emphasize the positive image of the union and capture the attention of NALC members and others passing by the bulletin boards.

quarters departments greater flexibility, both in terms of time and control, than would be the case if work were handed over to a commercial printer and/or design firm. This also means considerable savings as well. Other national unions must look outside—and pay a premium price—for the talents and skills on call for NALC.

For instance, members of the department work with the CAU staff on annual revision of the *Joint Contract Administration Manual* and recently assisted in the completion of the updated *Defenses to Discipline* guide.

Specialized writing requests are periodically directed to the department, along with design and layout of one-time and occasional projects, e.g., invitations and brochures, salutary or fraternal greetings commemorating a special event, COLCPE recognition certificates and Leadership Academy "diplomas." There is a continuing need for such "products," which the department aims to fulfill with the same high-quality work as in the past.

INFORMATION CENTER

THE INFORMATION CENTER PROTECTS the documentation of the union's past, manages the records of the union's current operations, and provides information needed to chart the union's future course. While all three responsibilities share a common concern with organizing, protecting, and accessing information resources, they involve distinctive duties, which will be discussed below.

ARCHIVES

According to the old cliché, "You can't know where you're going if you don't know where you've been." The NALC's official archives exist so the members of our union will always know where the NALC has been. Since 2001, the archives have been housed at the Walter Reuther Library of Wayne State University in Detroit, Michigan.

This year marks the 40th anniversary of the 1970 postal strike. The attention paid to that event clearly demonstrates the wide interest in our union's history. Not only our members, but anyone concerned with the NALC's past now can conduct research using our archival material, and profit from the assistance of the Reuther's professional staff.

In addition to making our historical record available to a wider audience than would be possible if we kept everything in Washington, using the highly regarded Reuther enables us to take advantage of their expertise and ensures that our precious but sometimes fragile historical materials are professionally preserved. Since our archival materials consist not just of documents, but also include photographs, newspaper clippings, uniforms, video- and audiotapes and other memorabilia, the preservation challenges are tremendous. While the records are stored in Detroit, we retain ownership of our material, and can retrieve needed documents at any time.

The wealth of NALC's resources at the Reuther was dramatically displayed in an exhibit at the archives, "Still Delivering: A History of the Letter Carriers 1889-2009." I was fortunate to be able to attend the opening on September 21, 2009, along with university officials and faculty, and more than 150 letter carriers who were in town for another function. The Reuther reports that many other NALC members were able to enjoy the exhibit in the eight months it was open.

A smaller version of this display—the original consisted of more than 25 panels and filled the Reuther's expansive main exhibit space—will be shown at the Anaheim convention. Kathryn Dowgiewicz, who curated the original exhibit and who is now the archivist in charge of the NALC collection, put together this portable display for the benefit of those who could not make it to Detroit. Following the convention, it will be

available for branches to borrow, so that all NALC members can have an opportunity to learn more about their union's history. I anticipate it will be as popular with our branches as the strike display prepared for the 2008 Boston convention has proven to be.

All of the NALC's records at the Reuther are now fully processed and available for research. These records generally cover the period from the late 1970s to 2000. Records after 2000 are still here in Washington, as they remain of practical use in our day-to-day operations. Material from before President Emeritus Sombrotto's tenure unfortunately is very limited.

The archive's enhanced website (reuther.wayne.edu) shows what's available in the NALC collection. The NALC page lists our various collections and provides an abstract or a detailed finding aid for each.

NALC's historical record at the Reuther is not just words on paper, which is reflected on the website, which includes photos from the image gallery. The pictures listed are just a start. Nancy Dysart, the director of NALC's Information Center, will be working with the Reuther to enlarge the number of photos available.

Mike Smith, the director of the Reuther, helps to create historical resources in addition to maintaining them. He recently completed an oral history with past president James H. Rademacher. This will nicely complement the oral history he did with President Emeritus Sombrotto a few years ago, and give interested researchers an invaluable window into a crucial time for our union and the American labor movement. The transcript of both oral history interviews are available in Detroit, as well as in Washington.

NALC's historical materials are not used solely for historical research. Visitors to the NALC Headquarters building can now enjoy three assemblages hanging in the lobby. Each is composed of artifacts and images from the union's collection. Together, these artworks provide a quick overview of NALC history.

While NALC's archival program continues to expand, other institutions are not so fortunate. The Postal Museum mounted a program commemorating the 1970 postal strike, which featured President Emeritus Sombrotto (the program can be seen at youtube.com/user/SmithsonianNPM). But the "Portrait of a Postal Worker" exhibit, which Dysart was working on with other postal labor groups, has been indefinitely postponed due to budgetary constraints.

RECORDS MANAGEMENT

As suggested above, records are not sent to the Reuther until they are no longer needed in Washington. But how to determine when something can be sent to the Archives? Defining how long to keep NALC-generated documents is an important part of our records management program.

Our records management program has now been in existence for almost 30 years. It began in the early 1980s, when the union recognized the need for an organized way to safeguard our records, one of our most vital assets. The aim of the program is to ensure the organization can easily access information in the records it produces, whether for practical, administrative or legal reasons. Retention schedules for officers and departments detail how long a given class of records should be kept in active, inactive or permanent status, and if or when it can be destroyed.

Active records are those currently in use. You'll find them in filing cabinets and on computers. Once records are no longer needed for daily work, they can be stored. The Washington office has the capacity to keep approximately 2,400 boxes of inactive documents in our record storage area, where they can be safeguarded but easily retrieved if needed.

It may seem that computers have solved our storage problem. But even on a disk or a computer server, you simply can't keep everything. Just as with paper documents, the key is to keep only the records you need. The ease with which digital versions of documents can be saved compounds the organizational challenge. How do you find the specific document you need among the hundreds, if not thousands, stored on the computer? And how do you ensure that obsolete documents are regularly destroyed, both the paper and the electronic version? There is no easy solution—the union continues to confront this issue.

Once records have reached the end of their useful life, it's time for them to be either destroyed or stored permanently. If they are to be kept for the foreseeable future, where? Here in Washington, or in the official archives? Most permanent documents will end up in Detroit, except for those needed for legal reasons.

Records which no longer have any practical or historical value are regularly destroyed. To safeguard any sensitive data, all documents are pulped by a professional document destruction company.

Obviously, records management is important for every level of the union. The NALC has a branch retention schedule for local documents. The secretary-treasurer's seminars include a records management session, to help branch officers manage their records. And Dysart is always available to answer questions about specific local issues.

INFORMATION CENTER

The Information Center staff has to know the issues of importance to the NALC. This knowledge determines what information sources are collected and how the resources are organized. Without this knowledge, the Information Center would not be successful in its mission to harness the power of information for

the union's important task of advancing and protecting the interests of letter carriers.

Although many records and information sources are now digital, the NALC still needs a physical space to house paper documents and other hard-copy information resources. Space was at a premium in the NALC Information Center. The shortage was hampering staff members in their job of collecting, organizing and making available current information sources—books, magazines, government documents—on subjects important to the union. Subjects monitored for material relevant to NALC include the Postal Service and the mail business, but also the economy, health care, the labor movement and the federal government.

The Information Center has now been renovated and enlarged, with additional bookcases for the ever-expanding collection of postal and NALC publications. It was a tremendous effort to pack all the books and other documents while the Center was being renovated, and an equally large job to unpack them when the work was done. Debra Voigt of the Information Center staff was largely responsible for this effort.

While the USPS is increasingly moving its documents online, that does not mean we can abandon print altogether. Older versions of USPS handbooks are still needed. No superseded or obsolete postal handbook or other document is discarded, as it may contain material needed in developing the background to a grievance or an arbitration case. The Center also retains all old congressional or other governmental studies or reports dealing with the USPS.

The newly enlarged Information Center makes it easier for the staff to respond to reference questions and to fill other information requests. With the Postal Regulatory Commission considering five-day delivery, and with national negotiations looming on the horizon, it is even more important to have all our background material well organized and easily available.

Of course, a larger and larger percentage of our information sources are online, and not just those from the Postal Service. But not everything is available electronically. The older an item is, the less likely there will be a digital version. Although Washington, DC, has vast resources, sometimes we need to go beyond the immediate area. The traditional interlibrary loan network, which allows us to borrow materials from libraries all over the country, continues to prove its usefulness.

For information to be useful, it has to reach the user. The Information Center responds to research questions when asked, but the staff does not simply wait for questions to come in. Daily updates on current events and regulatory developments alert officers and concerned staff members to important issues, all part of the Information Center's effort to help the NALC use information to advance the union's goals.

ECONOMIC ANALYSIS AND POSTAL RESEARCH

THE NALC RESEARCH DEPARTMENT serves as the source of strategic and analytical support to NALC's Executive Council and the staff of each of the union's major departments. The department is comprised of Jim Sauber, who also serves as chief of staff, and Stephen DeMatteo, a research analyst. Together, they work closely with Nancy Dysart, director of the Information Center at NALC Headquarters.

The department follows and analyzes developments in the labor market, the economy and in the policy and regulatory arenas. Their work brings about a more robust understanding of the many forces that affect NALC's interests in collective bargaining and contract administration, political and legislative advocacy, communications and other union activities.

Major projects since the last convention in Boston include:

- Developing and supporting NALC's case in the Postal Regulatory Commission's review of the Universal Service Obligation and the letter and mailbox monopolies
- Contributing research to the labor movement's push from comprehensive health care reform and working with the NALC Legislative Department to ensure letter carriers' benefits were protected
- Assisting officers and the Education Department in training and educating NALC members at national meetings, Leadership Academy, state legislative conferences and other venues
- Building the case for reform of the Postal Service's pension issues and the retiree health care obligations
- Shaping NALC's fight in Congress and the Postal Regulatory Commission against the Postal Service's irrational attempt to curtail Saturday delivery services

Throughout the life of the current National Agreement, the research department has been in constant preparation for the next round of bargaining. As the latest contract nears its end, the Research Department is analyzing the labor market and the Postal Service's financial situation in shaping NALC's bargaining strategy.

Beyond the walls of the Sombrotto Building, the research team often serves as NALC's liaison in our activities with the AFL-CIO and its affiliate, our sister affiliates of UNI Global Union and in the broader research and policy world.

Below is a more detailed description of some of the activities and responsibilities of NALC's Research Department.

TRAINING AND EDUCATION

A well-informed and well-educated membership is key component to any union's success. Recognizing

the importance of this, NALC's resident officers and the Education Department have built a robust structure for training and educating NALC members at all levels. The Research Department regularly contributes to these activities.

At the Leadership Academy, the department works with young NALC leaders to develop their understanding of the many factors that affect the Postal Service and the union's activities. This includes studying developments in the general economy and how they influence the Postal Service's performance. The department also reports on the changing composition of the NALC by examining a demographic profile of the union's membership today and throughout the last 40 years. The research team also presents on the union's collective bargaining history and its position in the labor market. Additionally, in conjunction with staff from other departments, the research team provides training on writing skills that will be critical to the future success of NALC's young leaders.

The research department also provides educational training at the semiannual state chairs conference in Washington. By deepening state chairs' understanding of the key issues affecting letter carriers and the Postal Service, the department has improved NALC's ability to lobby Congress effectively on behalf of its members. In the two years since the Boston convention, research staff has briefed state chairs on the impact of health care reform legislation, the effects of the recent economic crisis and the intricacies of the Postal Service's pension surplus and retiree health care pre-funding requirements.

POSTAL REGULATORY COMMISSION

As the 2008 convention in Boston came to a close, the Postal Regulatory Commission was preparing to issue a congressionally mandated report on the universal service obligation and the postal monopolies. The department shaped NALC's case before the Commission by researching the social and economic value of a robust universal service obligation supported by the monopoly.

To support NALC's argument, the department analyzed the regulatory structure of posts in other parts of the world, reviewed similar studies conducted in the past and analyzed the many submissions to the PRC case. When some participants in the USO study called for the dismantling of the universal service obligation or the elimination of the monopoly, the research department provided evidentiary support that NALC used to push back against these attacks.

It was during this PRC study that the Postal Service first began consideration of a five-day delivery week.

COMBINED FEDERAL CAMPAIGN

THE NALC HAS ALWAYS BEEN AN ENTHUSIASTIC SUPPORTER of the Combined Federal Campaign, which is designed to allow postal and federal government employees to make charitable donations through payroll deduction.

Each year, I have issued an endorsement of the annual CFC campaign and suggesting that NALC members use the opportunity to make regular donations to the Postal Employees' Relief Fund, Union Community Fund, the United Way, or any charity of an individual's choice.

NALC has also been involved in overseeing the campaign in the nation's capital and on a national basis.

As a representative of the NALC, Director of Public Relations Drew Von Bergen was elected in 2005 as a member of the CFC National Committee (now called the Combined Federal Campaign Foundation), which advises and consults with the U.S. Office of Personnel Management (OPM) on the operation of the annual campaign. He also has served for many years as a member and labor representative on the Local Federal Coordinating Committee (board of directors) of the Combined Federal Campaign for the National Capital Area, the largest campaign in the national CFC effort.

The department was immediately called upon to counter these claims and began structuring NALC's response. NALC initially responded by calling into question the assumptions made by the Postal Service's economists and reiterated the important business and social value of six-day delivery.

When the PRC issued its report to Congress in December 2008, it was clear that NALC's voice had been heard. The Commission recommended that Congress maintain the postal monopolies and a robust universal service obligation including six days of street delivery per week.

Currently, the research department is coordinating NALC's response to the Postal Service's formal proposal to the PRC for the elimination of Saturday delivery. The research team has analyzed the Postal Service's proposal and is testing its claims about cost savings, volume losses and other aspects of its case. Working with the president and other officers, the department is currently crafting NALC's testimony in support of six-day delivery.

The PRC is scheduled to issue its recommendation regarding the Postal Service's proposal sometime this fall. Until that time, NALC intends to vigorously defend six-day delivery and the long-term viability of a vibrant Postal Service.

POSTAL REFORM AND LEGISLATIVE SUPPORT

One of NALC's most important priorities since the Boston convention has been to make the case for reform of the Postal Service's pension issues and the future retiree health care pre-funding requirements. In the past months, the Research Department has tracked and analyzed each development regarding these two issues, briefing union leadership and developing an action plan to ensure the future viability of the Postal Service.

Studies conducted by the Office of the Inspector General of the Postal Service and the PRC have each shown that the Postal Service has \$75 billion in overpayments to the federal government for its share of pension liabilities. Additionally, the future retiree health care pre-funding requirement has driven the Postal Service from profitability to deep losses in the past three years.

Research staffers have provided the background research in support of NALC's position on these two issues. They've discovered that the pension surplus is a product of faulty accounting methods and that the pre-funding requirement is both unprecedented and unfair to the Postal Service and its employees and customers. Ultimately, if the pension surplus were to be restored to the Postal Service, the retiree health

care obligation would be fully funded and the pre-funding burden would become unnecessary.

Together with the Legislative Department, the research staff has created a plan to rectify these issues and return the Postal Service to health. NALC has been the leader in bringing these issues to the attention of Congress and the administration and anticipates the legislative action letter carriers and the Postal Service deserve.

OTHER RESEARCH ACTIVITIES

In addition to its research duties, the department regularly contributes to various NALC publications, including *The Postal Record*, legislative e-Activist messages, nalc.org, and the *NALC Activist*. Research staffers have contributed material on foreign post offices, the economic crisis, health care reform and a number of other subjects. The department regularly provides the printed updates on cost of living adjustments, Postal Service finances and the "USPS By the Numbers" in each *Activist*.

NALC is an active affiliate of our global union federation, UNI Global Union. In addition to participating in many of UNI's meetings and conferences, the research staffers sit on a number of UNI steering committees.

The research department also represents NALC on the Employee Thrift Advisory Council (ETAC), a group of 15 employee group representatives that advises the Federal Retirement Thrift Investment Board on the investment of retirement savings invested in the Thrift Savings Plan. Jim Sauber has ably served several terms as Chairman of ETAC and can often be seen testifying before Congress on issues relating to the TSP.

LEGISLATIVE AND POLITICAL AFFAIRS

THE DEPARTMENT OF LEGISLATIVE AND Political Affairs advocates for letter carriers in the halls of Congress, engages carriers at the grass roots level and coordinates electoral and issue campaigns. The National Association of Letter Carriers is now a force to be reckoned with in the legislative and political world. Below is a brief overview of the Department's activities since the NALC convention in Boston.

FIELD PLAN FOR THE FUTURE

Unveiled in 2006 by President Emeritus William H. Young, "NALC's Field Plan for the Future" established a blueprint for each state association to build and maintain an infrastructure for political and legislative activism.

Following a historic decision to transform the primary function of the NALC's state associations of at the Las Vegas convention in 2006—letter carriers have dedicated themselves to electing worker-friendly candidates to office. The fight doesn't stop there. After these office-holders are elected, letter carriers then engage in a fierce lobbying effort to ensure these officials support letter carriers' priorities.

NALC's legislative and political clout has grown tremendously as letter carriers have taken immense pride in their positions of congressional district liaisons (CDLs) and COLCPE coordinators—both of which are volunteer positions. In each of the 435 U.S. House Districts, CDLs have made themselves the face of the union's priorities to their respective member of Congress. Each branch has charged a letter carrier—a COLCPE coordinator—with building the rolls of COLCPE donors and automatic contributors. Through their efforts and the "Gimme 5" program NALC's political action fund, COLCPE, has grown to an unprecedented level.

The field plan itself is divided into four phases. Phase 1 established the basic steps every state association needed to take to lay the groundwork for meaningful legislative and political activism. Phase 2 developed leaders' skills to run legislative and political campaigns, as well as to work with organizations outside of the NALC. Phase 3 defined advanced techniques such as running campaign schools to train NALC members nationwide to be more effective campaigners. Building off the successes from 2008, we are improving our program to motivate and train NALC activists using new tools technology has made available.

Through the creation of the e-Activist Network and the Carrier Corps program, we have mobilized and organized letter carriers across the country. Letter carriers who are part of the e-Activist Network—those who have provided the union with their e-mail address—receive pertinent information on NALC's legislative and political priorities and often are asked to take action on their behalf. Carrier Corps members are active and retired members who have pledged at least 10 hours of personal time for NALC sanctioned political and legislative activity. The Carriers Corps T-shirts worn across this county represent the hard work and dedication of members of this union to ensure a worker-friendly Congress and legislative agenda.

TRAINING ON NALC'S ISSUES

As federal employees, Congress can undo many of the benefits we have earned and can put letter carriers jobs at risk, which is why it's important that they are armed with the skills necessary to successfully move NALC's legislative and political agenda. The Department of Legislative and Political Affairs is tasked with creating the content and materials to make this a reality. Through interactive trainings, letter carriers across the country now have the skill set to lobby Congress, message on NALC's legislative agenda, recruit other carriers to contribute to COLCPE, volunteer on behalf of the union and be leaders on issue or electoral campaigns. The majority of these trainings take place out in the field at NALC branch meetings, regional trainings and/or state conventions. Semi-annually, the Department hosts NALC's state chairs from across the country for a legislative and political training to ensure that the most pertinent and necessary information to lead their state into activism on behalf of the union.

REBUILDING THE MIDDLE CLASS

Letter carriers across the country played an integral role in advocating for issues that directly affect them but also joined with the larger labor movement to promote a worker-friendly agenda. In 2008, the NALC released hundreds of carriers to work directly with other union members across the country as part of the AFL-CIO's Labor 2008 campaign. Through our efforts, the NALC once again helped deliver a worker-friendly Congress and White House. In 2009, we released letter carriers to apply grass roots pressure on elected officials in an effort to pass legislation to make it easier for workers across the country to join a union if they choose.



The surest way to the middle class is to join the labor movement and the NALC dedicated resources to help rebuild the middle class through greater access to collective bargaining. Additionally, we helped shape the outcome of the historic health care reform legislation that was signed into law in 2010—letter carriers in 13 states worked with their brothers and sisters in the labor movement to secure changes to the bill over the past year to protect their members and, indeed, all working families. This legislation will end the worst of insurance company abuses and represents a great stride forward for letter carriers and other working Americans.

NATIONAL STAFF

Letter carriers can be proud of the team that works to promote their legislative interests in Washington, and to generate effective political action at the state and local level. They are:

DIRECTOR OF POLITICAL AND LEGISLATIVE AFFAIRS: As director of legislative and political affairs, Jennifer Alvarez Warburton has served as the NALC president's chief legislative and political adviser since October 2006. Since she took over as leader of the department, NALC has registered numerous legislative and political victories, and our work both in the field and Capitol Hill continues to draw admiration and respect throughout the labor movement.

POLITICAL DIRECTOR: Political Director Tucker McDonald manages our political action committee fund, the Committee on Letter Carrier Political Education (COLCPE), and makes recommendations for COLCPE contributions to selected candidates and campaigns each election cycle. Before taking this position in October 2006, McDonald served as special assistant for political education.

NATIONAL FIELD DIRECTOR: Meaghan Slater was appointed national field director in July 2009. Prior to that, she served as a regional field coordinator for the union. Slater oversees the implementation of the Field Plan for the Future, developing grass roots training programs for activists, mobilizing members for political action and legislative advocacy, and working with the regional field coordinators to inform and educate NALC's state and local leadership about the union's legislative and political priorities.

REGIONAL FIELD COORDINATORS: The NALC employs five legislative and political regional field coordinators (RFCs) who are based in Washington. RFCs monitor political campaigns within their regions, and provide lobbying support as directed. Traveling across the country, RFCs assist NALC state chairs at state conventions and other events, provide training, and conduct briefings on political and legislative activities. They will join the many letter carriers

who will be released this fall to work the AFL-CIO Labor 2010 campaign. The regional field coordinators' states are:

Mid-America (CO, IA, MN, MT, NM, ND, OK, SD, TX & WY)

Southern (AL, AR, FL, GA, LA, MS, NC, SC, TN & VA)

Northeastern (CT, DE, ME, MD/DC, MA, NH, NJ, NY, PA, RI & VT)

Western (AK, AZ, CA, HI, ID, NV, OR, UT & WA)

Central (IL, IN, KS, KY, MI, MO, NE, OH, WV & WI)

COLCPE

The NALC has remained successful in its efforts to grow the number of letter carriers who automatically contribute to COLCPE every month. Since its inception in 2006, the "Gimme 5 for COLCPE" campaign has increased the percentage of automatic contributing from 2.3 percent to 7.3 percent. For NALC members, automatic contributing has become the preferred method of giving to COLCPE. In 2010, 93 percent of all contributions were received through automatic contributions.

During the 2008 election cycle, NALC raised approximately \$4.2 million through voluntary letter carrier contributions. COLCPE gave \$1.7 million to candidates, incumbents, national party committees, state parties and leadership PACs. The NALC takes pride in not only supporting candidates that stand up for our issues, but also supporting candidates who are successful in winning elections. In the 2008 election, COLCPE made contributions to 330 candidates and 86 percent of those candidates won their election in November.

NALC also spent approximately \$2 million on activities relating to the Labor 2008 program. These activities include taking more than 200 letter carriers off their routes and releasing them in 32 states to mobilize union households in support of labor endorsed candidates. The NALC also worked with state associations and branches to send out mailings in these battleground states to our members in support of NALC-endorsed candidates.

The NALC's success in raising money for COLCPE can be traced back to the hard work of our NBAs, state chairs, branch presidents, and COLCPE coordinators. Day in and day out, these leaders remain dedicated to convincing all NALC members of the importance of giving to COLCPE. Through this dedication, the NALC will have the resources it needs to further the political and legislative agenda of our members.



EDUCATION DEPARTMENT

NALC'S EDUCATION DEPARTMENT SAW some significant changes during the past biennium, not the least of which was the retirement of Ralph Goldstein in early 2009. Ralph had ably served as NALC's director of education since 1990 and helped to create and produce many of the NALC's educational programs and materials over the past several decades. Regional Administrative Assistant Jamie Lumm was appointed by President Young to replace Goldstein and assumed the position in May 2009. Lumm, a letter carrier from Branch 2038, Kent, Washington, brought more than 25 years of a wide variety of union experience to the position. In addition to serving as an RAA in Region 2 for more than five years, Lumm was the director of education for the Washington State Association for 12 years, an arbitration advocate for more than 22 years, a Step B Team member for more than six years, as well as serving in various branch positions, including six years as president. Prior to moving to headquarters, Lumm had been utilized regularly as an instructor at national-level training sessions for arbitration advocacy, the Dispute Resolution Process as well as at national conventions. He is a welcomed and much valued addition to NALC Headquarters staff.

ACTIVE TRAINING

NALC LEADERSHIP ACADEMY

Begun in 2005, the NALC Leadership Academy continues to reflect the national leadership's belief in the importance of developing and preparing the next generation of union leaders for the challenges that are surely ahead. May 2010 saw the graduation of the ninth class, bringing the total number of graduates to 269. Director Lumm works closely with retired national officers Jim Williams and Jim Korolowicz as well as Nancy Dysart, director of the NALC Information Center, to coordinate and conduct the Academy.

Admission to the Academy begins with the completion of a written application form available on the NALC website or from the national business agent's office during the application acceptance period of June 1-September 30. Applicants must be endorsed by a union leader who commits to mentoring and providing them with additional learning opportunities. Each fall, 60 applicants are selected from among the hundreds submitted to attend either the winter/spring or the summer/fall class in the following year.

The rivers of NALC talent and dedication continue to run deep as evidenced by the high quality of each new Leadership Academy class. We are con-

stantly encouraged by the commitment and willingness to work hard and help others that we see in each successive class. If what we see in the Leadership Academy is any indication of the future leadership of the NALC, and we believe that it is, we have a bright future ahead of us.

The Leadership Academy consists of three week-long sessions over a five-month period at the National Labor College in Silver Spring, Maryland, followed by a week at the national business agent's office. Between sessions, students are required to complete an outside learning project based upon what was covered in the previous session and submit a written report about it. Each project must receive prior approval by the Academy staff and each report is edited and critiqued by Headquarters staff writers.

The Academy curriculum is designed to both develop and enhance the skills and knowledge base that are essential for NALC leaders. In addition to the Academy staff, each of the resident national officers as well as dozens of headquarters staff, help teach these topics providing students with the NALC's top experts in each field. As the Academy has developed over the past five years, so has the curriculum. While much of the original core of subjects remains, many have been added, deleted or changed as the Academy constantly strives to provide to best educational experience possible for each class. Although adjustments are sometimes necessary due to the demanding schedules of the resident officers, the subjects presented are as follows:

Week 1: Building effective unions, leadership approaches, leadership self-assessment, labor and NALC history, NALC bargaining history, how adults learn, learning styles, teaching techniques, preparing a teaching outline, *NALC Constitution* and bylaws, effective meetings and committees, leadership and character, and ethical decision-making. Students are also required to prepare and teach a class on a subject of their choosing.

Week 2: The legislative process, community services, grammar and writing skills, writing tools, clear and effective writing, computer resources, creating newsletters, communication and active listening, Workers' Compensation, Mutual Benefit Association, retirement programs, NALC Health Benefit Plan, public speaking for union leaders, contract administration, and the dispute resolution process. Students are also required to give three speeches, one before a small group, one before a large group and one "after dinner" speech before their classmates and the resident officers.

Week 3: NALC demographics and diversity, strategic planning, one-on-one campaigns, the Postal Service and the economy, negotiating techniques, interest-based dispute resolution, LMRDA

and reporting requirements, fiduciary duties of branch officers, branch record-keeping, NALC dues and membership, basic tax rules for local unions, city delivery, safety and health, recruiting union activists, developing and mentoring new leaders. During the course of the week, students are also required to develop, in groups, a strategic plan to deal with a specific problem in a branch and make a presentation of their plan to the class.

This wide variety of subjects covered along with the expertise of the instructors and the dedication of the students has a synergistic effect where the total Leadership Academy experience is far greater than the sum of its parts. Academy graduates have already made a considerable impact upon the NALC as many have gone on to leadership positions at their branches as well as at the state, regional and headquarters staff levels.

NATIONAL SECRETARY-TREASURER TRAINING

The NALC conducted national secretary-treasurer workshops in the fall of 2009 in Washington, DC, and Chicago, which were attended by several hundred branch presidents, secretaries, treasurers and other financial officers. Director Lumm worked with NALC Secretary-Treasurer Jane E. Broendel to conduct each of these two-and-a-half-day sessions. Other presenters included NALC Information Center Director Nancy Dysart, Director of Membership Wayne Nicely and outside auditors David Dorsey and Scott Price.

The sessions covered a variety of topics of interest to those with branch fiduciary responsibilities, such as: reporting requirements under the labor management reporting and disclosure act, payroll systems and controls, preparing Forms LM-3 and IRS 990, basic tax rules, branch fiduciary responsibilities, branch records management, strategic budgeting, dues and membership and branch self-audits. Director Lumm also worked Secretary-Treasurer Broendel to produce updated versions of the Secretary-Treasurers Training Manual and the Branch Officer's Guide to Finance and Administration.

STEP B TRAINING

The NALC continues to work with USPS Headquarters to prepare and conduct joint training for Step B candidates as part of the Dispute Resolution Process. There are currently 58 teams actively employed in 48 USPS districts around the country, which means that providing replacement and backup training is an ongoing process. Since the Boston convention, weeklong Step B training sessions were held at the Bolger Training Center in November 2008, March and November 2009 and March 2010. Director

Lumm, along with his counterpart from the USPS, head a training team consisting of USPS and NALC Headquarters staff, regional administrative assistants, area labor representatives and experienced Step B Team members.

Step B candidates receive training on various sections of the contract, *JCAM* and postal manuals as well as in contract application, computer research and decision writing. In order to become certified as a Step B Team member, candidates must satisfactorily complete all work assignments, demonstrate proficiency in decision writing and pass a comprehensive written examination on the contract. The NALC continues to work with the Postal Service staff to improve and update this training.

ARBITRATION ADVOCACY TRAINING

Although the Dispute Resolution Process has dramatically reduced the number of cases going to arbitration each year, there are still a number of disputes that must be appealed to a neutral third-party arbitrator for final adjudication. Because of the high resolution rates at Step B, those appealed to arbitration tend to be ones with complex and/or high-stakes issues requiring careful attention to case selection and advocacy.

In August 2009, the NALC conducted advocacy training, which focused on issues surrounding the Postal Service's National Reassessment Process (NRP) and its application of certain provisions of the *Employee and Labor Relations Manual*. Along with Executive Vice President Gary H. Mullins, Director Lumm assisted retired and current directors of compensation, Ron Watson and Greg Dixon, respectively, in conducting this three-day session at the National Labor College for 30 NALC advocates and RAAs who specialize in handling injured worker cases. Following this training, NALC Headquarters began monitoring the NRP/*ELM* injured worker cases appealed to arbitration and assigning headquarters or regional advocates to these cases.

Based on information supplied by the national business agents, NALC Headquarters continues to access each region's need for new advocates and holds training as warranted. Additionally, specialized training for select advocates on specific issues is planned for the Anaheim convention as well as in September 2010.

NATIONAL CONVENTION

In addition to conducting training at the Anaheim convention, entitled Building Better Files for Step B, Director Lumm helped prepare and conduct specialized training for NBAs, RAAs, state chairs and other activists. Lumm also assisted other resident officers and headquarters staff with their classes.

PUBLICATIONS

NALC ARBITRATION ADVOCATE

The NALC Arbitration Advocate was a specialized publication for NALC arbitration advocates. Produced three times a year, it focused on key trends and issues in arbitration and enhancing the knowledge and skills of NALC advocates. The Education Director worked with other headquarters staff members to write and publish the Advocate. Regular contributors in the past biennium include: Al Apfelbaum, Mark Sims and Sue Wellhausen from the Contract Administration Unit as well as Nancy Dysart from the NALC Information Center.

However, in early 2010, after nearly 12 years of publication, it was determined that there was no longer the need for a regular publication focusing on just this one subject. Instead, President Rolando commissioned the Education Department and the Contract Administration Unit to produce NALC's own arbitration manual incorporating much of what has been written in the Advocate over the past 12 years. Retired CAU staff member Stephen Hult is heading up the process of compiling, editing and rewriting material for this valuable resource for advocates, which should be completed by early next year. New advocacy issues will be

addressed as they develop in a segment to be added to NALC's other educational publication, the *Activist*.

NALC ACTIVIST

The education director also contributed articles to the *NALC Activist*, an educational publication for local leaders. During the past biennium, the *Activist* was published three times a year and covers a wide variety of subjects of interest to local union activists including legislative issues, branch administration, fiduciary responsibilities, community service projects, local activism as well as grievance handling and local contract administration. With the cessation of the *Advocate*, the *Activist* will move to a quarterly publication and, as noted above, will include advocacy segments as needed.

POSTAL RECORD

Starting with the July 2010 issue, President Rolando commissioned Director Lumm to write a monthly article for *The Postal Record*. The focus of these columns will be to provide members of the educational opportunities available within the NALC and to discuss methods, tools and techniques that local branch leaders can use to develop and conduct local training to educate and empower their membership.

MUSCULAR DYSTROPHY ASSOCIATION

WHO KNEW IN 1952 THAT the association between NALC and MDA would turn out to be as productive as it is? We were MDA's first national sponsor and we are still a leader in helping MDA in its fight to provide help and hope to those stricken with muscular dystrophies.

The last two years have seen a dramatic increase in our contributions to this worthy charity. MDA is our only cause that has been adopted by our union. While many branches take part in local charitable causes, MDA has our devotion. We have never stopped working for "Jerry's kids" and our commitment is to be there until a cure is found.

MDA helps those afflicted with more than 40 neuromuscular diseases and provides clinics and other help for the families. From wheelchair repair to flu

shots, MDA is actively involved with each child that comes through the door at no cost to those families. Your contributions fund all these efforts. Since 2008, we have raised an additional 24 percent with an increase of almost \$400,000. You all should be proud of what we've accomplished.

But that is not nearly enough. Last year, since I assumed the office of president, we added a national bowlathon to help us add to our totals. My goal is to get us to \$3 million by 2012. Can we do it? I think we can. We're asking each branch to put forth more effort. We now have about 500 branches actively raising funds for MDA and we have more than 2,200 total branches. Please consider joining us on November 7 during the national bowlathon as a way to jump start your involvement. More details will be following in the upcoming months in *The Postal Record*.

Dramatic changes are occurring every day in research and we are getting drugs and therapies that offer those afflicted a better quality of life. The support the MDA gives to families make a huge difference. When NALC MDA Coordinator Jim Williams and I visited MDA Headquarters this year, I was struck by how MDA shares research gains with other genetic scientists to benefit those with other genetic diseases. You can rest assured that many benefit from their work in addition to those with the neuromuscular illnesses covered by MDA.

So what is my message to you, the members? If your branch is actively involved with the Muscular Dystrophy Association, seek to increase your efforts. If your branch is not involved, why not? Appoint an MDA coordinator for your branch today. Start small but, by all means, start. These kids are dying every day without a cure. Please, help.

THE NALC ACTIVIST



COST OF NALC ACTIVIST

	4/08 to 3/10
Printing	\$34,437
Postage	\$11,602
Total	\$47,039
Number of issues	6

THE NALC ACTIVIST BRINGS useful, timely information to the union's shop stewards, branch officers and other activist members who, working together, keep the union strong. The newsletter is produced under the direction of the Office of the Executive Vice President.

Every issue contains the latest USPS data, along with training and seminars scheduled for each NBA region. Numerous headquarters staff members contribute to the publication, resulting in articles covering a wide range of topics. Six issues of the Activist have been published since the last convention report. Subjects covered include:

- Minor Route Adjustments
- How to Read a Disciplinary Notice
- Buying and Maintaining a Branch Building

- NALC Demographics
- The Successful Grievance File
- New FMLA Requirements
- TEs and Workers Comp
- Assignment of New Deliveries
- OSHA Form 300—a Resource for Branch OWCP Reps
- TE Removals
- The Truth about GPS in Postal Vehicles
- Delegates' Convention Expenses
- What to Expect at Your First Convention
- Sometimes It's the Little Things (in Handling Grievances)
- TEs: Separation and Lack of Work
- Contractors Vs. Employees: an IRS Story
- Grieving Limited Duty Violations
- Duty of Fair Representation
- The Interview (in the grievance process)

REPORT OF THE PRESIDENT OF THE NALC AUXILIARY

GREETINGS OFFICERS, DELEGATES and visitors. It has been my great honor to serve as your president the past two years. I take seriously the trust you have given me.

Your board has been very busy updating records. I am very proud that, for the first time in NALCA history, we actually know who our members are. We are just not a number anymore. The Auxiliary owes a big thank-you to Marie Rasmussen for the daunting task of setting up our database on an Excel sheet. She also redesigned the per capita and credential forms making them more user-friendly. We also owe thanks to Cythensis Lang for entering the organizing book on an Excel sheet.

Earlier this year, President Rolando appointed Vice President Gary Mullins to be his liaison to the Auxiliary. We have had several conversations and I am looking forward to working with him in the future.

I have instituted a plan to keep more communication between the national officers and their members. Each officer is assigned a group of states. You will have the opportunity to meet with your assigned officer this week.

Due to a vacancy on the board, I asked Cythensis Lang to take over the vice president duties while continuing to be the bylaw chair. I then appointed Sue Prather to become the bylaw director.

I attended all state chairs legislative sessions that the NALCA Board was invited to by the NALC. I took the opportunity to hold board meetings to

coincide with the state chairs. This saved Auxiliary funds and brought more continuity to the board. As a COLCPE donor, e-Activist and Carrier Corps member, I continue to work for the NALC political agenda. It was especially rewarding working during the 2008 presidential election.

I have personally answered all e-mails, letters and phone calls received from members and other inquiries concerning the NALC Auxiliary. I assisted our treasurer, Kathy Miller, with all correspondence we received from the IRS.

We had a few requests for a national officer to attend state conventions. I was not able to fill all the requests due to budget constraints. My hope is that our treasury continues to build so all requests in the future can be honored. I attended both Wisconsin and West Virginia state conventions.

Finally, I want to thank Cythensis, Marie, Kathy, Edie and Sue for being so easy to work with and being my friends. Thanks to the Wisconsin State Association of Letter Carriers and its auxiliary, Branch 574 and local Auxiliary 465 for all of their support. I would never be able to continue to serve as your president without the support of the most important people in my life. Thank you to my parents, Bob and Elaine Ibsen. Thank you, Carrie, Erik, Hazel, Audrey and baby James. Thank you Ken, Janel and Ali. Last and most important, I would like to give a very special thank-you to my own retired letter carrier, Jim.

NATIONAL-LEVEL ARBITRATION DECISIONS

1. Case No. Q94C-4Q-C 98117564 (Address Management System Specialists):

This national level grievance, brought by the American Postal Workers Union, involves APWU's contention that the Address Management Specialist position has been improperly classified as a supervisory position. APWU sought an order transferring either the position, or the work performed by AMS employees, to the bargaining unit. NALC intervened to protect its potential jurisdictional interests, but, with the agreement of all parties, reserved the right to present evidence until the remedy phase of the case.

Hearings were held before Arbitrator Carlton Snow on February 22 and July 23, 2002.

On April 29, 2003, the Arbitrator issued his Award, sustaining APWU's grievance.

On June 18, 2003, NALC filed a motion for clarification of the Award on the grounds that certain statements appeared to require that all the disputed work be assigned to the clerk craft. NALC's motion argued that any such determination by the Arbitrator would be inconsistent with the agreement of the parties that the issue of craft designation was to be deferred to the remedy phase of the case. NALC's motion was supported by the Postal Service and opposed by APWU. The motion was still pending at the time of Arbitrator Snow's death. The parties never agreed on a procedure for resolving the issue raised by NALC's motion.

The Snow Award has since been the subject of extensive litigation between the Postal Service and the APWU in the U.S. District Court in Washington, DC, and in a separate proceeding before the National Labor Relations Board.

On January 29, 2007, the APWU sent a letter to the NLRB disclaiming any interest in representing any employees in the AMS classification. Based on this letter, the Board issued an order, dated February 23, 2007, clarifying the APWU bargaining unit to exclude the AMS classification. This decision ended the NLRB proceeding.

On August 7, the District Court issued a decision granting the Postal Service's motion for summary judgment. The Court

found that the NLRB's final ruling superceded the Snow Award, thus rendering the Award unenforceable. At the same time, the Court left open the question whether any of the work performed by AMS employees constituted bargaining unit work. The Court found that the question of work assignment was a separate issue which had never been addressed by the Snow Award.

The APWU appealed the District Court's decision to the U.S. Court of Appeals for the D.C. Circuit. On December 23, 2008, the Court of Appeals reversed the District Court's decision, finding that the Snow Award did hold that the exclusion of the disputed work from the bargaining unit was a violation of the collective bargaining agreement. The Court remanded the case to the District Court to determine whether enforcement of this aspect of the Award would violate the National Labor Relations Act.

Following the remand, the parties filed cross-motions for summary judgment in the District Court. On May 24, 2010, the Court granted summary judgment in favor of the Postal Service. The Court held that the transfer of AMS duties to the clerk craft would be contrary to binding NLRB precedents. Accordingly, the Court ruled that the Snow Award is unenforceable.

2. Case No. Q06C-4Q-C007141697

(Issuance of ELM 665.17): This case was an appeal by APWU under Article 19 of the National Agreement. The appeal protested the issuance of ELM Section 665.17 which requires all employees who are required by law to register as a sex offender with any jurisdiction to report their status to management. NALC intervened in support of APWU's position that the self-reporting requirement was unreasonable insofar as the sex offender registries are accessible by the public and, therefore, by postal management. A hearing before Arbitrator Das took place on November 1, 2007. Post-hearing briefs were submitted on September 9, 2008. On January 31, 2009, Arbitrator Das issued his Award denying the appeal. The Arbitrator held that the Postal Service had a legitimate need for the information, and that the self-reporting requirement was reasonable in light of evidence that the public sources were not sufficient or reliable.

3. Q98-N-4Q-C01167325 (FMLA Form Letters Case):

This Article 19 case involved a challenge to Form Letters issued by USPS to be used by management in connection with requests for leave protected by the Family and Medical Leave Act of 1992 (the "FMLA"). Both APWU and the Mail Handlers intervened in support of NALC's position. Following negotiations which narrowed the number of letters in dispute, a hearing was held before Arbitrator Dennis Nolan on June 20, 2008. On October 13, 2008 Arbitrator Nolan entered an opinion and award sustaining the grievance in part and denying it in part.

The letters addressed particular factual circumstances that can be expected to arise with requests for FMLA leave including

HONORING LONG-TIME MEMBERS

THE NATIONAL ASSOCIATION OF LETTER CARRIERS honors its retirees in a unique way. Our retirees are an integral part of our organization and, as such, retain both their membership and union rights. But more than that, when they have belonged to the NALC for 50 years or more, we honor them with either a gold membership card, a lapel pin or a plaque. The gold cards are presented to our 50-year members; the lapel pins are given to our 60-year members and the plaques are awarded on the members' 70th and 75th anniversaries.

Most of our branches make quite an occasion out of the actual presentations, and I write a letter to the retiree expressing my personal gratitude for his or her continuing support of the NALC over the years.

These honors have developed over time:

50-year gold cards: In 1939 at the Minneapolis convention—NALC's 50th anniversary—the delegates voted to honor retirees with gold cards. Since that time, NALC has issued more than 31,188 of these cards.

60-year lapel pins: The lapel pin tradition began in 1954 at the Cleveland convention. Over the 54 years since then, some 6,041 pins have been awarded to 60-year members.

70- and 75-year plaques: The Seattle convention in 1974 determined that plaques should be given to any letter carrier achieving 70 and 75 years of membership. Not too many years ago, the idea of any one reaching these plateaus was remote indeed. However, during the past two years, 48 members have been honored for their long records—46 members have been with the NALC for at least 70 years, one has been honored for 75 years as a member and in 2009, we honored one member who had reached 80 years with the NALC.

The following presentations of membership awards have been made since the Boston Convention:

- 75-year plaques: 1
- 70-year plaques: 46
- 60-year pins: 1,041
- 50-year gold cards: 2,542

EQUAL OPPORTUNITY EMPLOYER

NALC CONTINUES TO HONOR AND SUBScribe to its affirmative action program, which provides for a continuing analysis of the association's human resources and personnel policies and practices and formalizes our

commitment to recruit, hire, train and promote all persons without regard to race, color, creed, religion, sex, marital status, age, handicap, veteran status or national origin. This program has the strong support of this administration.

issues relating to the sufficiency of information provided by an employee's physician to certify that the leave is attributable to a serious health condition. In this respect Arbitrator Nolan sustained one of NALC's principal objections to the Form Letters: an effort by the Postal Service to place the onus on an employee to obtain additional information from the employee's physician where the physician has already completed a certification form. This situation can be expected to arise most commonly where the employee suffers from a chronic condition and USPS complains that the doctor's estimate of the frequency and extent of future incapacity is unknown. In rejecting the USPS's effort to so burden the employee, the arbitrator relied upon the Department of Labor's regulations which require that an employer obtain clarification of a certification by having a physician retained by the employer contact the employee's doctor. Arbitrator Nolan also required the Postal Service to provide clarification with respect to the scope of the medical release required in certain instances in the FMLA process.

Among other things, Arbitrator Nolan rejected NALC's challenge to Form Letters that sought clarification of a completed certification where that information was sought through contact with the employee's doctor by a Postal Service physician and NALC's contentions concerning the scope of the second medical opinion that may be required in the certification.

4. Case No. Q01N-4Q-C-07229522 (Revisions to ELM 546.2): This case was an appeal by NALC under Article 19 of the National Agreement challenging proposed new language which management sought to add to subsections 546.21 and 546.23 of the Employee and Labor Relations Manual (ELM) pertaining to the permanent transfer of injured employees from one craft to another. The new language provided, for the first time, that all such transfers "must be accomplished through Article 13 of the National Agreement applicable to the craft to which the employee is being reassigned or reemployed." The principal consequence of this proposed amendment was that the so-called reciprocity provisions of Article 13, Section 5—permitting employees in the gaining craft to bid on the resulting vacancy in the losing craft—would apply when an injured employee is transferred to a new craft under ELM 546. Thus, if an injured full-time letter carrier were permanently transferred to the clerk craft, the resulting residual vacancy in the

letter carrier craft would be posted for bid by clerks.

The disputed new *ELM* language was the fruit of bipartite negotiations between the Postal Service and the APWU during the 2006 round of collective bargaining. NALC did not participate in, and had no prior notice of, the negotiation of the MOU.

NALC's principal argument was that the proposed change was in conflict with Article 13 as interpreted by Arbitrator Mittenenthal in a national-level award issued in 1985. The Mittenenthal Award specifically held that the transfer of an injured employee from the letter carrier craft to the clerk craft under the provisions of *ELM* 546 is not covered by the reciprocity rule in Article 13.5. NALC also argued that the proposed *ELM* change was not fair, reasonable, and equitable.

Hearings before Arbitrator Das were held on June 25 and August 4, 2008. Post-hearing briefs were submitted on October 20.

On March 20, 2009, Arbitrator Das issued his Award which completely upheld NALC's position. The Arbitrator found that the proposed *ELM* 546 revision was inconsistent and in conflict with Article 13, as previously interpreted by Arbitrator Mittenenthal. He also noted that any expansion of the reciprocity provisions of Article 13, Section 5 could not be implemented without the consent of NALC.

5. Case No. Q94N4Q-C99052344 (Separation of all Casuals): This national level interpretive case involved NALC's contention that Article 12, Section 5.C.5.a.(2) of the National Agreement requires the Postal Service to separate all casuals, regardless of craft, before involuntarily reassigning letter carriers out of the installation, so long as doing so will minimize the impact of the reassignment on regular employees. APWU and the Mail Handlers intervened in support of NALC's position. Hearings were held on January 14 and February 6, 2009. Post-hearing briefs were submitted on June 19.

On November 11, 2009, Arbitrator Das issued his Award rejecting NALC's position. Instead, Das upheld the Postal Service's argument that Article 12.5.C.5.a.(2) only requires separation of casuals in the affected craft, i.e., the craft from which regular employees are to be reassigned.

NALC DIRECT ARBITRATION COSTS

	Two-year period ended 3/31/08	Two-year period ended 3/31/10	Percentage Increase
Arbitrator's fees	\$1,832,755	\$1,899,725	3.65%
Cancellation fees	369,594	346,680	-6.20%
Transcripts	—	—	—
Miscellaneous	5,200	—	—
TOTAL	\$2,207,548	\$2,246,405	1.76%

NALC DISCIPLINE ARBITRATION

	Sustained	Sustained in part	Denied	Total*	Percent denied
2000	223	206	505	982	51.3
2001	201	181	420	860	48.8
2002	113	85	276	494	55.9
2003	131	96	255	507	50.3
2004	108	68	191	367	52.0
2005	87	76	184	347	53.0
2006	27	20	56	103	54.4
2007	96	73	141	334	42.0
2008	79	63	166	318	52.2
2009	73	72	174	328	53.0
2010	34	32	62	130	47.7

NALC CONTRACT ARBITRATION

	Sustained	Sustained in part	Denied	Total*	Percent denied
2000	274	82	463	882	52.5
2001	349	98	492	1,030	47.8
2002	264	49	364	724	50.3
2003	230	66	360	689	52.2
2004	185	37	275	497	55.3
2005	135	41	202	378	53.4
2006	31	18	54	103	52.4
2007	147	18	193	377	51.0
2008	112	33	151	304	49.7
2009	128	30	136	313	43.5
2010	68	6	51	129	39.5

*The total figure includes cases where no decision was issued by the arbitrator—for example, because the cases were settled during or after the hearing.