Branch Officers Training and other reminders

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Two more Branch Officers Trainings have been set for later this year in Cleveland, OH and New Orleans, LA. These two sessions will be the ninth and tenth that we have held since the training was created in 2015. More than 1,200 branch officers have been through the program.

Branch Officers Training is an expansion of the Secretary-Treasurer Seminars held in the past. In addition to the basics for financial officers—taxes, payroll, reporting to the Department of Labor (DOL), etc.—Branch Officers Training includes specialized sessions for branch presidents/vice presidents, recording secretaries, financial secretaries and trustees. The training lasts three and a half days. Here's an overview of what it covers:

***Constitution* and bylaws—**This session covers what is required in branch bylaws and common errors.

DOL reporting—This session reviews the history of the Labor-Management Reporting and Disclosure Act (LMRDA) and how it affects the activities of unions and union officers. Participants will learn about each title of the LMRDA and the reporting requirements under the law.

Travel, reimbursements and per diem—This session helps branches comply with the tricky IRS and DOL rules involved in travel payments.

Handling MDA funds and PAC funds—Covers the rules for collecting and remitting these funds.

Preparing LM forms and 990s—Participants will get into the nitty-gritty about completing these required filings.

Auditing branch records—This session is for trustees and will teach how to ensure a complete audit.

What am I signing?—This session is for branch presidents/vice presidents and will cover the responsibility and legal exposure that goes along with signing certain documents.

What policies should your branch have?—This session identifies policies that every branch should have in place.

Why minutes matter—This session assists recording secretaries in maintaining accurate and complete minutes.

Member notification requirements—This session will cover required notifications and the proper way to make them.

Payroll and wage issues—This session covers the ins and outs of payroll.

Recordkeeping—This session teaches the proper way to keep records consistent with DOL guidelines.

Dues and membership—This session guides branch officers through membership issues that they deal with on a daily basis; it also explains how to read a dues roster.

Fiduciary issues and practices—This session gives participants practice applying what they learned in the DOL reporting and constitution and byaws segments.

Managing branch finances and creating transparency — This session provides guidance on the day-to-day aspects of running the financial affairs of a branch.

Fraud prevention and detection, internal controls— This session is designed to identify the biggest risks of fraud and how branches can establish procedures to prevent it.

Branch elections—This session covers *NALC Regulations Governing Branch Election Procedures*.

I was just elected, now what?—This session is focused on helping officers learn more about branch operations.

Strategic planning and budgeting—This session helps officers plan and budget.

Introduction to QuickBooks—At the suggestion of past participants, this session is designed to provide guidance on how to set up and use QuickBooks.

Per capita tax call

The six-month per capita tax call will be mailed out to branches this month. NALC bills branches semi-annually, in June and December, for the national and state per capita tax of their direct-paying members. For more information on the six-month per capita tax call, please refer to the *NALC Branch Officer's Guide to Finance and Administration,* which has a separate chapter on NALC dues (Chapter 2). Please see pages 2-12 and 2-13. The guide can be purchased from the NALC Supply Department and an electronic copy is available on the NALC website at nalc.org/financeguide.

Changes of officers

Many branches and state associations have installed officers in the past few months. Branches and state associations are asked to please notify the Office of the Secretary-Treasurer in writing as soon as possible after a change of officers. This can be done via a letter or by filling out a "Branch Information Record" card—which is included quarterly with the dues roster. New officers will not begin to receive their mail from Headquarters until NALC is notified of their names, titles and addresses. NALC's membership database stores the names of branch and state presidents, secretaries and treasurers, and the information in the database is used for mailings.