



WELCOME TO **AFTPA**

Wendy G. Coleman, President

2026

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WELCOME MESSAGE

Dear member:

Let me be one of the first to welcome you to AFT Pennsylvania, one of the oldest and largest unions of educators in the Commonwealth. As the state federation of AFT, we have the privilege of representing 76 locals and more than 36,000 members across the state, including educators and school-related personnel, higher education faculty and staff, and state employees.



As the President of this storied organization, I recognize that our work has never been more important, and now more than ever, we must come together to ensure that our public schools are fully funded, educators have the resources they need, our rights to bargain are protected, and our democracy is safeguarded for generations to come.

That's why our AFTPA Executive Leadership and staff are committed to securing the strongest Collective Bargaining Agreements for our locals, uplifting the incredible work our members are doing across the state, providing resources and support for members, and collaborating with union allies like the AFL-CIO – the AFT, of course! – and more, to build a stronger and broader labor movement that fights for all workers. We're in this fight with you and for you.

There are many reasons why life is better in a union – including community, solidarity, and workplace protections. Other benefits to being in a union include:

- Unionized workers make over \$10,000 more per year than those not in a union.
- 30 percent more union workers participate in employer-provided healthcare than their non-unionized counterparts.
- 60 percent more union workers have defined-benefit pension plans than non-union workers.

In solidarity,

A handwritten signature in black ink, which appears to read "Wendy G. Coleman". The signature is fluid and cursive, written over a white background.

Wendy G. Coleman
President
AFT Pennsylvania

ABOUT AFTPA

AFT Pennsylvania represents more than 36,000 members in 75 local affiliates throughout the Commonwealth. Our members are public, private, and charter school teachers and support staff, college and university faculty and staff, and state employees throughout Pennsylvania. The AFT constitution requires that your local join and maintain affiliation with the state federation. Only by working actively at every level—local, state and national—can we create the power necessary to accomplish our goals.

The purposes of AFT Pennsylvania is:

- Sec. 1. To promote the welfare of the children and youth of the Commonwealth and provide progressively better educational opportunities for all.
- Sec. 2. To bring the locals of the American Federation of Teachers in Pennsylvania into a relationship of mutual assistance and cooperation and to raise the standards of teaching by securing conditions essential to the best professional services.
- Sec. 3. To promote the program and policies of the American Federation of Teachers.
- Sec. 4. To promote statewide organization and unionization of public, private and charter school teachers and support staff, college and university faculty and staff; and state employees throughout Pennsylvania.
- Sec. 5. To cooperate with organized labor and to promote within the autonomous locals of the AFT Pennsylvania policies and procedures which are consistent with the aims of organized labor.

AFT Pennsylvania is an affiliate of AFT, the American Federation of Teachers, which was founded in 1916 and today represents 1.8 million members in more than 3,000 local affiliates nationwide.

AFT President: Randi Weingarten
AFT Secretary-Treasurer Fedrick C. Ingram
AFT Executive Vice President: Evelyn DeJesus

As of June 2022, the American Association of University Professors (AAUP) is an affiliate of AFT, meaning all AAUP members are also AFT members.

AFTPA and AFT are both affiliates of the AFL-CIO, which is a democratic, voluntary federation of 63 national and international labor unions that represent nearly 15 million working people.

AFL-CIO President: Liz Shuler
AFL-CIO Secretary-Treasurer: Fred Redmond

As affiliates of the national AFL-CIO, we are also associated with the Pennsylvania AFL-CIO as well as the various Central Labor Councils (CLCs) throughout the state.

PA AFL-CIO President: Angela Ferritto
PA AFL-CIO Secretary-Treasurer: Maurice Cobb

EXECUTIVE COUNCIL 2025-2027

AFT Pennsylvania's Executive Council is elected every two years during the AFTPA Biennial Convention. The next convention will be during the summer of 2027.

President: Wendy G. Coleman

Executive Vice President: William Hileman

Treasurer: Erik D. Fleming

Assistant Treasurer: Arthur G. Steinberg

Secretary: Trina Dean

Assistant Secretary: Denise Rogers

Legislative Representative: Benjamin Hover

Assistant Legislative Representative: Diane Zeitlman

Vice President for Paraprofessionals: Brenda Marks

Vice President for Paraprofessionals/School Related Personnel: Marguerite Ruff

Vice President for Area Career & Technical Education: Timothy Mello, Jr.

Vice President for Retirees: Donna Matthews

Vice Presidents at-Large:

- Carrie Badger
- Cyndi Bolden
- LeShawna Coleman
- Luke Dougan
- Harold Halbert
- Colin McCann
- Kathryn Monti-Triebel
- Elisabeth Yoder

Vice President for Central Region: Julia Puza

Vice President for Colleges Region: Jeffrey Doshna

Vice President for Northeast Region: Jennifer Telesco

Vice President for Northwest Region: Matthew J. Mikovich

Vice President for Southeast Region: Tara Huber

Vice President for Southwest Region: John Harrell

Vice Presidents for Philadelphia:

- Christopher Aichele
- Andrew Barczak
- Suzanne Cataline
- Andrea Gaskins-West
- Bruce A. Harris
- Ed Olsen

Vice President for Pittsburgh: Robert Mitchell

OUR LOCALS

AFT Federation Union Local #762 of Claymont, Delaware
AFTPA Retiree Steering Committee
Allegheny Intermediate Unit #3 Federation #4394
Allentown Federation of Paraprofessionals #1716
Alliance of Charter Schools Employees #6056

- Environmental Charter School Federation of Teachers
- Environmental Charter School Paras Unit
- Esperanza High School Collective
- Folk Arts-Cultural Treasures Federation of Educators
- New Foundations Charter School Federation of Teachers
- New Foundations K-8 Education Alliance
- Northwood Academy Charter School Federation
- Urban Pathways K5 Federation of Educators
- Westinghouse Arts Academy United
- West Oak Lane Charter School

Bethel Park Federation of Teachers #1607
Bucks County Community College Federation of Teachers #2238
Carlynton Federation of Teachers #2120
Central Pennsylvania Institute of Science and Technology #3361
Chartiers-Houston Federation of Teachers #3135
Chartiers Valley Federation of Teachers #4388
Children's Village Federation of Teachers #6066
Coatesville Federation of Educational Employees #4275
Community College of Allegheny County Federation #2067
Daniel Boone Federation of Support Staff #4954
Delaware Valley University #6803
Dunmore Federation of Teachers #907
Erie County Technical School Federation of Teachers #1589
Faculty & Staff Federation of Community College of Philadelphia #2026
Federation of Pottstown Teachers #4390
Federation of Reading Area Community College #3173
Federation of State Cultural and Educational Professionals #2382
Girard College Federation of Teachers #6065
Girard Federation of Teachers #2099
Green Tree Federation of Teachers #4802
Jefferson Federation of Teachers #1900
Lackawanna County Vocational-Technical Federation of Teachers #3876
Lincoln Technical Institute #3845
Lincoln University #6804
Montgomery County Community College Faculty Federation #4272
Montgomery County Community College Support Staff #4316
Moore Federation of Teachers #2208
Neshaminy Federation of Teachers #1417
New Castle Federation of Teachers #3975
North Allegheny Federation of Teachers #2097
Northampton County Community College Federation of Teachers #3579
PA Highlands Community College Federation of Teachers #6221
Parkway West Federation of Teachers #2088
Pennsylvania School for the Deaf #9624
Peters Township Federation of Teachers #3431
Philadelphia Federation of Teachers #3
Pittsburgh Federation of Teachers #400
Pittston Area Federation of Teachers #1590
Robert Morris University Faculty Federation #3412
Scranton Federation of Teachers #1147
Southeast Delco Federation of Support Staff #4768
Steel Center Vocational Technical School Federation #3621
Temple Association of University Professionals #4531
Temple University Graduate Students Association #6290
United Academics of Philadelphia #9608
United Staff of the Day School #1372
University of Scranton #6805
Upper St. Clair Education Association #4270
Upper St. Clair Support Services Federation #4389
West Mifflin Federation of Teachers #2340
Western Montgomery Career & Technology Center #2214
Western PA School for Blind Children Staff Federation #3942
York Vocational Technical Support Staff #4667

LEGISLATIVE PRIORITIES

A Better Future for Public Education in Pennsylvania

AFT Pennsylvania believes every child in the Commonwealth deserves access to a well-funded, high-quality public education. To achieve this, we urge lawmakers to act on the following six priorities:

1. Continue Investment in K-12 Public Education

- Continue the investment and maintain a fair, equitable, and adequate funding formula per the Commonwealth Court's ruling.
- Prioritize funding for students facing poverty, disability, trauma, homelessness, or language barriers.
- Ensure periodic reviews of adequacy targets every five years.

2. Prevent the Creation of More Private School Vouchers

- Roll back existing voucher programs, and strongly oppose any expansion of voucher programs, including tax credits, educational savings accounts, and scholarships.

3. Reform Charter and Cyber Charter School Funding

- Cap cyber charter tuition rates to reflect actual costs.
- Enforce transparency and accountability for charter management companies.
- Enact a moratorium on new cyber charters and cap enrollment in low-performing schools.
- Re-implement the Charter Line Item in the state budget.

4. Strengthen Higher Education Access and Affordability

- Reinvest in community colleges, state, and state-related universities.
- Oppose efforts to divert public higher ed funding to private or for-profit institutions.

5. Support and Respect Educators

- Protect collective bargaining rights and reject anti-union legislation.
- Increase compensation and job security for adjunct and contingent faculty.
- Guarantee academic freedom and faculty control over instructional materials.

6. Fix and Strengthen the Educator Pension System (PSERS)

- Reduce high-risk, high-fee private equity investments.
- Increase stakeholder representation and board diversity.
- Require full fee disclosure and set limits on management and performance fees.

Why are these AFTPA's priorities?

- Cyber charter overpayments waste more than \$290 million annually.
- The financial impact of charter schools on public districts can exceed \$17,000 per departing student.
- School choice belongs to the schools, not families. Unlike public schools, which are required to accept all students and are accountable to the public, private schools determine whether and how many students they will admit. Students who are more costly to educate, such as those with disabilities or at-risk students, are among those least likely to be accepted by private schools.
- Vouchers often fail to cover full tuition, primarily benefiting wealthier families, many of whom never attended public schools.
- Pennsylvania ranks in the top five states in the nation for average student debt.
- One in three contingent faculty earn less than \$25,000 per year, placing them below the federal poverty guideline for a family of four.

What must legislators do?

- Prioritize the continuous investment of public dollars for public schools and institutions.
- Reform charter funding and close cost loopholes.
- Reinvest in teachers, support staff, and faculty.
- Protect retirement security and union rights.

Together, we can create a better future for every student, educator, and family in Pennsylvania.

WEINGARTEN RIGHTS

One of the most vital functions of a Union is to prevent management from intimidating employees. Nowhere is this more important than in closed-door meetings when supervisors attempt to coerce employees into a confession of wrongdoing. The right of employees to have the presence of union representatives during investigatory interviews was announced by the U.S. Supreme Court in 1975 in *NLRB vs. J. Weingarten, Inc.* Since that case involved a clerk being investigated by the Weingarten Company, these rights have become known as the Weingarten rights.

Unions should encourage workers to assert their Weingarten rights. The presence of a union representative can help in many ways. For example:

- o They can help a fearful or inarticulate employee explain what happened.
- o They can raise extenuating factors.
- o They can advise an employee against blindly denying everything, thereby giving the appearance of dishonesty and guilt.
- o They can help prevent an employee from making fatal admissions.
- o They can stop an employee from losing their temper and perhaps getting fired for insubordination.
- o They can serve as a witness to prevent supervisors from giving a false account of the conversation.

WHAT IS AN INVESTIGATORY INTERVIEW

Employees have Weingarten rights only during investigatory interviews. An investigatory interview occurs when a supervisor questions an employee to obtain information that could be used as a basis for discipline or asks an employee to defend their conduct. If an employee has a reasonable belief that discipline or other adverse consequences may result from what they say, the employee has a right to request union representation. Investigatory interviews usually relate to subjects such as:

- o absenteeism
- o accidents
- o damage to company property
- o drinking
- o drugs
- o falsification of records
- o fighting
- o insubordination
- o lateness
- o poor attitude
- o sabotage
- o theft
- o violation of safety rules
- o work performance

If an employee has determined that disciplinary action may result from the investigatory interview, a simple statement such as: "If this discussion could in any way lead to my being disciplined or terminated, or affect my personal working conditions, I respectfully request that my union representative, officer, or steward be present at the meeting. Without representation, I choose not to answer any questions." would be enough to enforce their federally protected rights.

WEINGARTEN RULES

Under the Supreme Court's Weingarten decision, when an investigatory interview occurs, the following rules apply:

RULE 1: The employee must make a clear request for union representation before or during the interview. The employee cannot be punished for making this request.

RULE 2: After the employee makes the request, the employer must choose from among three options. The employer must either:

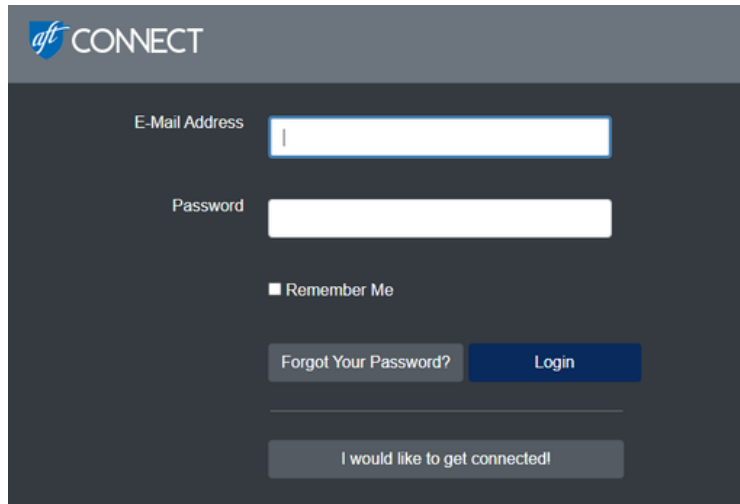
1. Grant the request and delay questioning until the union representative arrives and has a chance to consult privately with the employee; or
2. Deny the request and end the interview immediately; or
3. Give the employee a choice of:
 - a. having the interview without representation; or
 - b. ending the interview.

RULE 3: If the employer denies a request for union representation and continues to ask questions, they have committed an unfair labor practice, and the employee has a right to refuse to answer. The employer may not discipline the employee for such a refusal.

DIGITAL RESOURCES

CONNECT

<https://connect.aft.org/login>



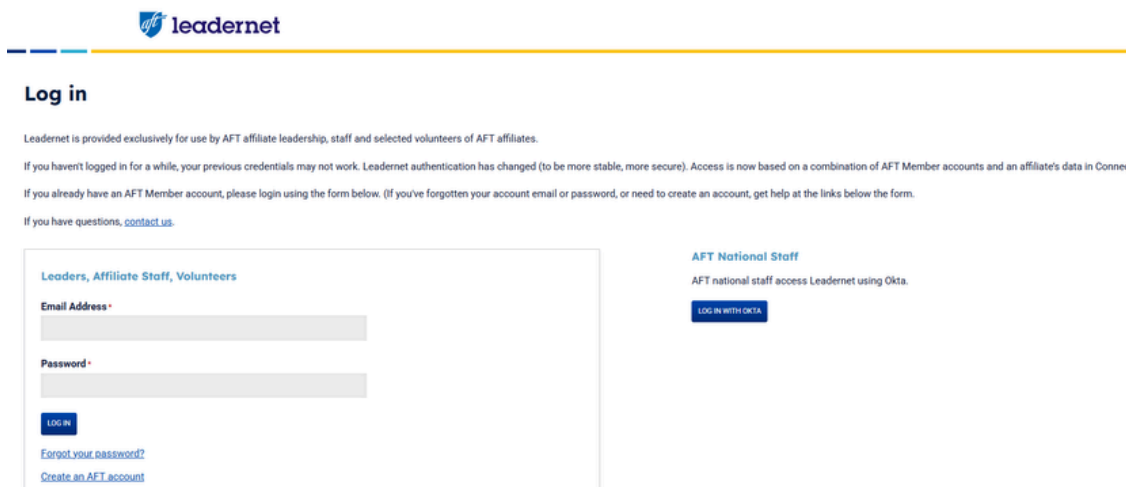
AFT Connect is an easy-to-use, web-based database for tracking individuals, affiliates, external organizations, and the relationships (both current and historical) between them.

Features include: Online membership forms and eDues; Custom reports; Event, survey, assessment and schedule tools; Flexible and customizable lists, reports, filters, and employment structures; User roles administered at the local level; and Integration with other solutions. For more information, contact <https://help.aft.org/>.

Local Treasurers should update Connect with their local's membership information regularly.

LEADERNET

<https://leadernet.aft.org/user/login>



AFT LeaderNet is a secure, registration-based website that gives AFT affiliate leaders, staff and authorized volunteers practical tools, easy-to-access information and news from the national AFT in one location—when you need it. LeaderNet is not intended for the general membership. It is strictly for use by AFT elected leaders, state and local staff and volunteer union activists.

Registered users will have daily access to AFT news, links to relevant newspaper articles, our meetings calendar, leader and staff directories and other valuable resources.

STATEWEB

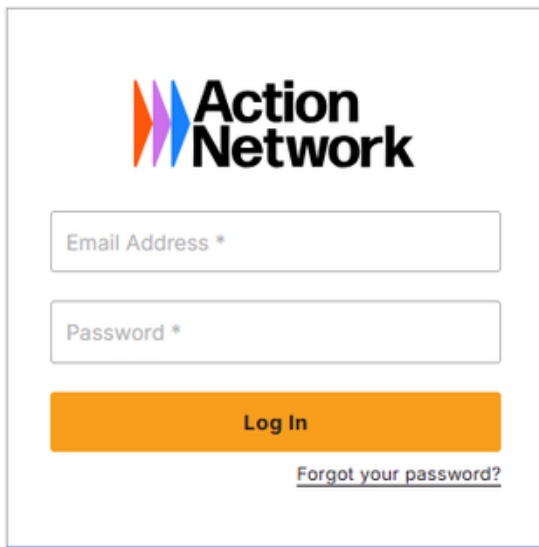
StateWeb provides websites to AFT affiliates for free. It offers an easy-to-use, Internet-based content management system (CMS) that allows affiliates to create and maintain its own website. StateWeb was developed by the AFT with the cooperation of several state and local affiliates with the following five key goals:

1. Ease of use - StateWeb uses templates, simple forms and a word-processing-like editor to make
2. posting content easy. A person can be trained on the system in under two hours.
3. Content syndication - StateWeb allows for the state federation and the national union to push content to the local websites, keeping the website current and informative. However, affiliates can easily remove any syndicated content from its site.
4. Content restriction - StateWeb allows affiliates to post content in a members-only section that can only be viewed by registered users who are authenticated AFT members.
5. Flexibility - AFT will be able to continually develop and enhance the program to meet the needs of local affiliates.
6. Free of charge - There is no cost to affiliates for using StateWeb.

StateWeb also offers an optional homepage slider for featured items, social media widgets, and integration with Action Network for e-mail sign-ups and events. Use of AFT StateWeb is made available via your state federation, AFTPA. If your local is interested in using the StateWeb program, email stateweb@aft.org.

ACTION NETWORK

https://actionnetwork.org/users/sign_in



Action Network is a web-based mass emailing, advocacy and event program designed to help you build your e-mail list, understand members more completely, communicate with them more intelligently and engage them more fully online and offline.

You can engage, retain, and increase your advocates:

- Mobilize your supporters (quickly and easily email your entire list of members);
- Gain new activists (members, families, neighbors, friends, associates);
- Build a pool of likely volunteers for rallies, phone banks and other offline activities;
- Sway decision-makers and target your message (send letters directly to Congress and state legislatures--the program gives you this information from your zip code entry);
- Create customized messages;
- Send acknowledgments of support; and
- Track your responses both by overall numbers and individual members.

Each affiliate has access to its own Action Network group. The AFT provides free online and telephone training for chapter managers, who will maintain the database and generate both information and advocacy campaigns and communications. The initial training takes approximately one hour. Follow-up training and support are always available.

Contact AFT for Action Network sign-up forms at actionnetwork@aft.org.

RUNNING YOUR LOCAL

Many local leaders often feel overwhelmed with demands for time and information from their members. The resources listed below from AFT are intended to provide some initial information to assist you in leading your local. Additional information is available from AFT's Union Leadership Institute (ULI) on LeaderNet at <https://leadernet.aft.org/uli>.

Planning effective meetings (<https://leadernet.aft.org/governance/uli/rununion/mtgs>)

This guide provides a summary of the key points leaders should keep in mind when running their meetings.

How to Run a Union Meeting (https://leadernet.aft.org/system/files/wysiwyg/how_to_run_a_union_meeting.pdf)

This resource provides basic information on how to conduct the unions' business in a democratic fashion. It guides leaders through a brief introduction to Robert's Rules of Order, the roles of different officers, and the characteristics of a good chairperson.

Executive Board Code of Ethics (https://leadernet.aft.org/system/files/wysiwyg/board_code_of_ethics.docx)

The executive board code of ethics is a useful tool for helping executive board members think through their duties towards each other and the work of the union outside of any constitutional specifics which may describe their role.

Union Planning: These two resources will describe the steps in long-range planning. An experienced planner can use it to lead a group through a long-range planning process. These are also useful on their own as an outline of the steps required by a local union considering starting a long-range planning effort.

- **Long-Range Planning** (<https://leadernet.aft.org/system/files/wysiwyg/planning.pdf>)
- **Elements of Strategic Planning** (https://leadernet.aft.org/system/files/wysiwyg/elements_of_strategic_planning.pdf)

Getting Members to Volunteer (https://leadernet.aft.org/system/files/wysiwyg/getting_members_to_volunteer.pdf)

Local union officers are always looking for members who will volunteer to help out or take a job in the local union. This document provides useful tips for getting people active and keeping them active.

LEADERSHIP DEVELOPMENT

A key element in the success of any local union is the behavior, creativity, and expertise of the elected leadership. The resources listed below from AFT offer several resources to leaders looking to develop strong leadership teams and prepare the way for new leaders. Additional information is available from AFT's Union Leadership Institute (ULI) on LeaderNet at <https://leadernet.aft.org/uli>.

Duties of the president, treasurer, and secretary

(https://leadernet.aft.org/system/files/wysiwyg/executive_board_duties.pdf)

This resource lists the responsibilities of the three top officers in most local unions – the president, treasurer and secretary. (Often the duties of the treasurer and secretary are combined in the position of secretary-treasurer.)

Ethical behavior (<https://leadernet.aft.org/governance/ULI/leader/ethical>)

Union leadership is a trust between the leader and the members.

Leadership transition (<https://leadernet.aft.org/governance/uli/leader/making-successful-leadership-transitions>)

How can we help a new leader and/or help a leader who has decided to move on, prepare for and execute a smooth transition? Peter Fischer offers a framework, which emphasizes the new leader's ability to identify and prioritize what is important and more importantly what is not, their desire to develop key relationships early in the transition process.

Teamwork (<https://leadernet.aft.org/governance/uli/leader/teamwork>)

All leadership teams are different yet successful ones share characteristics and avoid paralyzing behaviors. This document outlines which behaviors are positive and which ones to avoid.

OFFICER DUTIES



Your local should have elected officers to oversee the union day-to-day activities and to establish longterm goals. Most locals include the positions of president, vice president, secretary and treasurer. Many locals include several vice president positions carrying specific responsibilities.

President's duties

Most constitutions designate the president as the chief executive and charge them with carrying out the policies established by the membership. The president may delegate authority but not the responsibility of the office. The president's responsibilities include overseeing the following:

- A broad program of union activities that will help the union maintain the loyalty and confidence of its members, especially based on their support for the union in matters affecting the quality of professional practice and the well-being of the institutions in which they work;
- The negotiation and enforcement of the collective bargaining contract;
- Accurate membership recordkeeping;
- An effective membership recruitment program;
- An effective internal and external communications program;
- An effective political action program; and
- An organizational structure that allows you to effectively deliver services and carry out union policies to ensure the efficient, honest use of all union funds.

Specific responsibilities of the president include presiding at membership meetings, delegate assemblies and special meetings (most unions designate the first vice president to conduct the meeting in the president's absence); purchasing insurance for members and the local; establishing effective office procedures to track grievances and contract timetables, correspondence, membership records and other information and records; monitoring the decision-making bodies of employing institutions; supervising staff; and participating actively in the local AFL-CIO council.

In meeting these responsibilities, the president must always act within the confines of the constitution and the policies established by the membership/representative assembly and the executive board (which may have authority to act for the membership between meetings). If it's not possible to call a meeting, the president may be able to poll the executive board. If that is not possible, the president may act on their own and report these actions as soon as possible to the executive board and/or general membership/representative assembly. The president also is responsible for ensuring that the union vigorously defends any member whose civil or job rights are threatened. If the union incurs legal expenses while defending a member's rights, it may be eligible for financial assistance from the AFT's Defense Fund. If the union is forced to strike, it may be eligible for assistance from the AFT's Militancy Fund.

Purchasing insurance for members and the local.

If your local purchases professional occupational liability or accidental death and dismemberment insurance through the AFT, make sure that the membership list you have on file at the AFT is accurate and that your per-capita payments are up to date. Otherwise your members may not be covered! If your local's membership is a constituency other than teachers, check the coverage carefully to ensure that it meets the needs of your members.

Also, the AFT provides liability insurance for affiliate officers. This policy covers negligence, slander and libel, as well as "duty-of-fair-representation" lawsuits. Locals should make sure, however, that any officer who handles funds is bonded (see information below). If the local owns or rents an office and/or owns or rents office equipment, it should have fire, casualty and theft insurance coverage.

Overseeing the treasury and budget.

Although the union will have an office of treasurer, the president still is ultimately responsible for ensuring that the union has sufficient resources to carry out its mission; that union funds are handled in an honest and efficient way (the president should act as a co-signer, with the treasurer, on all financial instruments); that dues are properly collected; that the union's budget is properly prepared; and that proper accounting procedures and internal financial controls are used. Make sure that any person who handles union funds is bonded. For information about purchasing a bond through AFT contact the AFT accounting department or send an e-mail to billinginquiry@aft.org. If you represent private sector employees, your bond must conform to Labor Department specifications.

Monitoring the decision-making bodies of employing institutions.

The president should monitor all decision-making bodies related to the institution(s) in which members are employed. This includes school boards, boards of trustees, state agencies, city and county councils, commissions and, of course, the state legislature. When these bodies meet, there is no substitute for the president's personal attendance, since no other union officer commands the same authority. Through regular attendance, the president makes the union presence felt and has the opportunity to participate in the policymaking decisions of management. At these meetings, always speak with civility and decorum, but don't hesitate to disagree if necessary. Also be helpful and supportive when appropriate.

Supervising staff.

At some point you may determine that you need to hire staff. You have many options, including:

- **Release time.** Some union contracts allow members to be “released” from their regular duties to work part or full-time for the union. The union then reimburses the member at their regular rate of pay. An officer might go on release time status, for example, to handle membership grievances.
- **Temporary stipend for an officer.** Ask a particularly competent executive board member or the chair of a major committee to work for the union on a temporary, as-needed basis. The membership chairman could be hired for a short time to plan and execute a membership campaign, for example, or the treasurer could be hired temporarily to prepare the budget and financial records for a major membership meeting.
- **Expenses for regular activists.** Some larger locals pay their building reps a monthly stipend, contingent on their attendance at monthly building rep meetings and/or their performance of defined duties. This may tug at the volunteer ethic, but it often works. You may want to pay the members of your negotiating team and your area coordinators a small stipend to defray their expenses and to compensate for the long hours spent preparing for and participating in negotiations.
- **Part-time jobs.** Many unions will hire one or more members on a part-time basis to monitor phone calls and act as problem solvers. These part-time staff often work afternoons, after their normal work hours. The AFT’s organization and field services department offers a formal Membership Service Specialist assistance program. It has been highly successful, particularly with PSRP locals. Other possibilities for part-time jobs might include grievance chair, professional development coordinator or editor of the local union’s newsletter.
- **Full-time staff.** At some point, you may need to hire full-time staff. If your local can only afford one staff person, it is probably wise to hire the president. In some cases, however, a local may prefer to hire an executive director, an organizer or a grievance handler as its single staff person.

As you consider your options, keep in mind that the strength of your local is in the commitment and involvement of your members. Don't dampen the volunteer ethic in your union. Staff should supplement volunteer efforts, not replace them, and any money paid to volunteers should be regarded as a stipend or expenses, not as wages.

Also, making a staff structure work requires that the president (or someone else with this designated authority) supervise them well and provide them with the training and education they need to perform effectively. If you pay salaries to staff or stipends to officers, you must pay payroll taxes, deduct the appropriate withholdings and report all stipends to the Internal Revenue Service. Get advice from a qualified accountant regarding your recordkeeping and reporting responsibilities.

Finally, when the union acts as employer, it must abide by all laws regulating employment practices and maintain a work environment that is free of discrimination or bias. Seek out training and counsel in the myriad considerations in personnel management, including those related to hiring, evaluation and discipline.

Treasurer’s duties

The treasurer administers the finances of the union. They have direct, fiduciary responsibility for collecting and expending the members’ dues honestly and competently. This is probably the position of greatest trust within the union, requiring a person with integrity and honesty and who is willing to take on a serious responsibility. Members entrust the union with their money; it’s the treasurer’s job to ensure that this trust is not violated. They must keep scrupulously accurate financial records—both to ensure the integrity of the union accounts and to facilitate the union’s budgetmaking process. The duties of the treasurer include:

- Filing the necessary reports with the IRS, including a Form 990 if the local is above a certain size;
- Filing LM-1 and LM-2 reports if necessary (the Labor Department requires all locals with members in the private sector that are represented for purposes of bargaining and grievances, as well as any state federation that has at least one such local, to file annual LM reports. Larger locals with more than \$250,000 in annual revenues are required to file the LM-2 report. Smaller locals must file the shorter LM-3. Contact AFT’s legal department if you are not sure if your union needs to file LM reports);
- Paying per-capita dues to the AFT, the state federation, the state AFL-CIO and your central labor council;
- Making a regular report at representative assemblies/membership meetings and making an annual financial report available to the membership;
- Serving as a co-signatory with the president on all financial instruments and checks for the local;
- Preparing a budget and working to make sure that the union lives within the budget; and
- Ensuring that financial records are audited at least every two years by an outside auditor or an audit committee and providing a copy of the audit to the AFT (in compliance with the AFT constitution).

Establishing a budget.

The treasurer should work with the president and other officers to establish a budget and work to ensure that the union lives within the budget. In developing a budget proposal, the treasurer should first look at the union’s strategic plan and make recommendations for expenditures based on the resources needed to achieve the plan’s goals. Review financial records from previous years to determine the amounts spent for budget line items in the past. Once adopted by the appropriate union body, the budget is the union’s guide for future spending. Any major changes in budget projections should be reviewed and cleared with the appropriate union body.

Online training for treasurers

The AFT financial services department offers two Web-based resources for local financial officers. The first is the special interactive course, *Keeping the Records Straight*. Treasurers and financial officers can sign up for online classes on a variety of topics, ranging from filling out per-capita forms to preparing a local budget. Along with required reading, participants are asked to complete exercises and meet in a chat room to discuss that week's assignment with the AFT instructor and their classmates.

The reading and exercises are not time-consuming, and the chat sessions are arranged around the participants' schedules. Registration is done online; participants also can access the *Keeping the Records Straight* manual from the site. Registrants must sign up for a minimum of two classes. Online training can be accessed through the AFT's LeaderNet site at <http://leadernet.aft.org>. (First-time users must register at <http://leadernet.org/register/>.)

AFT's other online resource is the Job Aid, a companion resource to *Keeping the Records Straight*, which serves as a quick reference guide. The site contains "how to" sections on IRS Form 990, accounting for COPE funds, and processing new members. Treasurers can use the links on the site to download IRS forms and a variety of other forms. The site also includes samples of completed forms. The Job Aid site is also accessible through the AFT LeaderNet. grievance chair, professional development coordinator or editor of the local union's newsletter.

Secretary's duties

The secretary takes careful minutes that accurately record all actions of membership/rep meetings and at executive board meetings. At meetings, the secretary should distribute the minutes from the previous meeting and report on any official correspondence the union has received.

The date the minutes were adopted should be recorded and filed. Official minutes recorded by the secretary should also include any corrections made to the minutes, a restatement of any motions made and the roll call.

When the union adopts a budget, that, too, should be recorded and the budget attached to the minutes. Major expenditures that are voted on by your union's executive board or other body should also be recorded in the minutes.

The executive board/ committee/ council

The constitution outlines the composition and responsibilities of the executive board (sometimes known as an executive council or executive committee). The executive board usually includes the president, secretary, treasurer (in some locals the latter two positions are combined) and a number of vice presidents or at-large members. The vice presidents may be elected by the membership at large; by each constituency group (i.e., paraprofessionals, high school teachers, a certain state agency); or by region. Sometimes vice presidents have mandated responsibilities; the first vice president may be responsible for membership, for example, and the second vice president for political action.

In most locals, the executive board meets more frequently (usually once or twice a month) and is empowered to act on behalf of members between the regular membership or delegate meetings. Some constitutions allow the executive board to act on anything except constitutional amendments. Other constitutions may reserve certain matters for the membership. Most often, the executive board will conduct the most substantive discussions of union policies and plans. Following these discussions, the executive board will normally make policy, program and budget recommendations to the membership. Being able to work well within your executive board is key to running an effective, productive local.

Responsibilities of the executive board.

No matter how the executive board is composed and its responsibilities defined, don't place too much emphasis on the "executive" part of being a member of this body. A member of the executive board is more a super member than executive. It is important for executive board members to be team players who collectively adopt a "can-do" attitude and are willing to pitch in to get the union's work done. Individual executive board members should pledge to:

- Participate actively in meetings and board activities and serve willingly on committees when appointed.
- Keep informed on issues affecting the membership and the work they perform.
- Recognize that they "wear two hats"—one hat is raising issues that concern their worksites or constituencies, and the other is focusing on the bigger picture by supporting the union's efforts to address overarching issues.
- Consider the role as that of a "trustee" to ensure the union's long-term growth, success, security and fiscal integrity.
- Recognize that the designated officers should direct the day-to-day operation of the union— such as directing staff and overseeing finances— subject to the direction and approval of the board when it is meeting in a legally called session.
- Look for ways to build consensus, respect and support the majority decisions of the board.
- Declare when conflicts of interest occur and abstain from voting in those circumstances.
- Refrain from criticizing fellow board members, discussing confidential proceedings outside of board meetings or interfering in the duties of the officers.

MEMBERSHIP AND DUES

Quick Reference

What are “Per Caps?”

Per Caps is shorthand for per capita, a Latin term meaning “by the head” or “per person,” so it is the actual number of members your local has. Per Caps are how AFTPA and AFT calculate how much your local owes in dues (aka your monthly per capita invoice).

Who pays the local’s dues to AFTPA?

Ensuring that your local is paid in full for per caps is the responsibility of the local Treasurer (page 13).

How does my local calculate dues?

Per the AFTPA Constitution, the minimum annual local dues applying to teachers/professional members either shall be no less than 1.5 times the sum of the per capita of the AFT Pennsylvania, plus the per capita of the AFT, plus the per capita of the Pennsylvania AFL-CIO, or shall be no less than 1 percent of a member’s salary.

- This provision shall also apply to the dues for members of any separate locals of non-professional personnel.
- This provision shall not apply to the dues of non-professional members who are part of a Federation local which combines professional and non-professional personnel. In those cases, the minimum dues for the non-professional members either shall be no less than 1.5 times the sum of the appropriate per capita or shall be no less than 1 percent of salary.

Annual dues for members-at-large shall be set by the Biennial Convention, but shall be no less than 1.5 times the sum of the following: The per capita of the AFT Pennsylvania, plus the per capita of the AFT, plus the per capita of the Pennsylvania AFL-CIO, plus the charge for the AFT occupational liability insurance.

How are membership categories determined?

Membership categories are salary-based as follows. AFT National provides the income thresholds annually in August. They change yearly and are based on the March Employment Cost Index for public sector workers (state and local government) published by the Department of Labor.

- Full: Beginning teacher’s salary and above.
- Half: Members earning less than \$21,830 or less than beginning Teacher Salary (whichever is higher).
- Quarter: Members earning less than \$18,056. College Adjuncts are in this category.
- Eighth: Members earning less than \$10,963.

When are my local’s dues owed and to whom are they paid?

Dues for members-at-large shall be payable to the Treasurer of AFT Pennsylvania, Erik D. Fleming, by the 15th of each month.

What happens if my local pays its dues late?

Any affiliated local not paying its per capita tax by the 15th of each month shall be notified by the Treasurer and, if at the end of 3 months is still in arrears, shall be considered suspended and may be reinstated only by paying its arrearages in full or by special action of the Biennial Convention or of the Executive Council.

How does my local make sure our membership information is up-to-date with AFT and AFTPA?

Maintaining and submitting to the AFT current information on membership, elected officers, and executive board members are constitutionally required activities on the part of your local. Current membership information is used to calculate the monthly per capita invoice, as well as for mailing of AFT publications, and as proof of insurance coverage.

The Treasurer will submit your membership information to AFT and AFTPA through Connect (see page 9).

How long is the fiscal year?

AFT Pennsylvania’s fiscal year is from June 1 through May 31.

How long is the membership year at AFTPA?

The membership year for all at-large members shall run annually from January 1 through December 31.

As a member of my local, what other unions am I also affiliated with?

Your local must maintain affiliation with the following organizations:

- The state federation of the American Federation of Teachers, AFT Pennsylvania
- The national American Federation of Teachers, AFL-CIO
- The Pennsylvania AFL-CIO
- The appropriate central labor councils of the AFL-CIO

AFTPA AND AFT EVENTS

Both AFTPA and AFT host regular in-person and virtual events for our members that you may have the opportunity or interest in attending. Here are just a few to look forward to in 2026 and beyond:

AFTPA Union Leadership Trainings - throughout the year

Members are invited to these trainings via our email list.

AFTPA Regional Meetings - annually

- Western Region
- Southeastern Region
- Northeastern Region

AFTPA Executive Council Meetings - three times annually

The AFTPA Constitution dictates that the Executive Council shall meet at least three times annually.

AFT Convention - biennially

Next: July 16-19, 2026, in Washington, DC

AFTPA Summer Leadership Institute - biennially

Next: Summer 2026

AFTPA Convention - biennially

- Next: Summer 2027
- Per Article VIII of the Constitution:
 - The conventions of the AFT Pennsylvania shall be held biennially, with each biennial convention being held between the dates of April 15 and August 20 of the year in which the convention is held.
- In accordance with the AFT National and AFT Pennsylvania Constitution, the number of allotted delegates is proportional to the whole number membership count as reported on your monthly per capita statements averaged over the first twenty-four (24) months of the twenty-six (26) month period immediately preceding the month in which the convention is held. Each local receives one (1) delegate for each seventy-five (75) members or major fraction thereof, with a minimum entitlement of two (2) delegates for each local.

AFT MEMBER BENEFITS

With access to a wealth of opportunities and resources, the AFT has something for you.

- Working together, we improve the quality of the services we provide to those we serve, making our institutions better and stronger.
- By standing with our 1.7 million members, we make our voices heard on the national, state and local levels.
- By building a union, we improve our working conditions, our benefits and our ongoing professional education.
- We don't simply work in a community, we work with our community to better our neighborhoods and achieve social justice for all.

As an AFT member and through involvement in your local union, you have an advantage. You have the power to bargain; the power to negotiate; and the power to change things, win improvements, and accomplish the goals that matter to you and to the people you serve.

In addition, your membership comes with the following:

- Access to exclusive member benefits and services, including pet insurance, trauma counseling and services, hotel discounts, car rentals, and more: <https://www.aft.org/members-only>.
- Access to a variety of resources and information.
- PreK-12 teachers and higher education faculty and staff receive our quarterly magazine, American Educator (<https://www.aft.org/ae>).
- Access to free lesson plans and teacher resources, including trainings that count toward professional development credits with Share My Lesson (<https://sharemylesson.com/>).

RESOURCES

AFTPA Constitution and By-Laws:

<https://pa.aft.org/about-us/aft-pennsylvania-constitution-and-bylaws-2025-2027>

AFTPA Legislative Guide: <https://pa.aft.org/resources/aftpa-legislative-guide-2025>

AFT Connect: <https://connect.aft.org/login>

AFT LeaderNet: <https://leadernet.aft.org/user/login?destination=/home>

Action Network: https://actionnetwork.org/users/sign_in

AFT Member Benefits: <https://www.aft.org/members-only>

PSERS Active Member Information and Updates:

<https://www.pa.gov/agencies/psers/member-resources/mss-default.html>

AFTPA retiree newsletter sign up: https://actionnetwork.org/forms/sign-up-for-the-aft-pennsylvania-retiree-newsletter-2?source=direct_link&

AFTPA STAFF

Chief of Staff:

Director of Government and Political Affairs:

Director of Communications:

Staff Representatives:

Victoria G. Aristoklis, vgaristoklis@aftpa.org

Jeffrey Coyne, jcoyne@aftpa.org

Cindy Carr, ccarr@aftpa.org

Constance I. Lumb, clumb@aftpa.org

Krisann Selbst, kselfst@aftpa.org

Richard Steger, rsteiger@aftpa.org

Confidential Executive Asst. to the President:

Nakia Jones-Fogle, nfogle@aftpa.org

Administrative Assistant:

Kathy Noroski, knoroski@aftpa.org

STAY IN TOUCH



1-844-PENNAFT



www.aftpa.org



info@aftpa.org



Eastern office: 3031 Walton Road, Building C Suite 302 Plymouth Meeting, PA 19462

Western Office: 19 South 10th Street
Pittsburgh, PA 15203



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