

## **Understanding Your Role as Branch President**

As the elected leader of NALC branch 4837, your primary responsibility is to oversee all aspects of branch operations, enforce the NALC Constitution and branch bylaws, and represent members in dealings with USPS management.

According to the NALC Constitution (Article 4 of the Constitution for the Government of Subordinate and Federal Branches), the branch must have key officers including president, vice president, recording secretary, financial secretary, treasurer, sergeant-at-arms, MBA representative, health benefits representative, and a board of trustees (3 or 5 members).

Your position cannot be combined with others unless the branch has fewer than 10 members, and any vacancies can be filled by appointment. Focus on fostering a "we—not me" attitude to build collaboration in a small branch.

In our bylaws, stewards are elected and they are part of the officer corps and are included in the line of succession.

## Step-by-Step Plan to Lead Effectively

Outlined in the next pages is a structured guide organized into phases with actionable steps, timelines, and tips tailored to our branch size (e.g., leveraging limited resources efficiently). As a new President, use this as a roadmap to chart your path, adapting based on our branch's bylaws.

### Source List (this is not an exhaustive list)

- ❖ Branch website: [nalc4837.com](http://nalc4837.com)
- ❖ National website: [nalc.org](http://nalc.org)
- ❖ USPS handbooks and manuals >workplace issues>resources
- ❖ Membership portal>grievance starters, arbitration, rosters etc...
- ❖ Materials Reference System (MRS):

***The Materials Reference System (MRS)** is a collection of contract admin materials from NALC's Contract Administration Unit, aiding reps in enforcing the National Agreement. It supplements the authoritative JCAM (which prevails in conflicts) and includes summaries/full texts of Step 4 settlements, grievances, pre-arbs, memos, USPS policies, NALC pubs, and arbitration cross-references.*

- ❖ Finance: [https://www.nalc.org/union-administration/secretary-treasurer/body/branch\\_financial\\_guide.pdf](https://www.nalc.org/union-administration/secretary-treasurer/body/branch_financial_guide.pdf)
- ❖ Elections: <https://www.nalc.org/union-administration/secretary-treasurer/body/ElectionBook.pdf>
- ❖ Committee of Presidents <https://www.branch343.org/COP/>
- ❖ RAP Sessions:

***Article 3 Section 4(b) of the NALC Constitution states:** (b). The National President shall, once each year except in the year of the National Convention, call a national conference. This conference shall be voluntarily attended by only State and Branch Presidents or their designees, with their expenses to be borne by the State Association or Branch represented. National conferences are better known as “rap sessions.”*

- ❖ CCA guide
- ❖ Letter Carrier Guide
- ❖ Steward Guide
- ❖ Route protection program: <https://www.nalc.org/workplace-issues/city-delivery/body/RouteProtectProgChap1.pdf>
- ❖ Guide to Audit: <https://www.nalc.org/news/the-postal-record/2020/april-2020/document/S-T.pdf>
- ❖ Postal Record

### Phase 1: Preparation and Onboarding (First 1-3 Months)

Step	Actions	Tips for Branch	Resources
1. Review of Key Documents	Familiarize yourself with the NALC Constitution, branch bylaws, National Agreement, and USPS handbooks. Understand fiduciary duties under the Labor-Management Reporting and Disclosure Act (LMRDA).	Personally review records to spot gaps early; involve your executive board for shared knowledge.	NALC Constitution (available on nalc.org); USPS Handbooks and Manuals.(also on nalc.org)
2. Attend Training	Enroll in NALC Leadership Academy or workshops like "Strategic Planning for New Branch Leaders" for basics on operations and resources.	Virtual or regional sessions minimize travel costs; encourage your VP or secretary to join for backup.	NALC Leadership Academy details in Postal Record. Convention Pocket Guide for workshop overviews.
3. Assess Branch Status	Audit current finances, membership records, and ongoing grievances. Verify dues collection and member status changes.	Identify inactive members for re-engagement.	Branch Officer's Guide to Finance and Administration.

### Phase 2: Building Your Team and Structure (Months 3-6)

Step	Actions	Tips for Branch	Resources
1. Assemble Executive Board	Ensure all required positions are filled; appoint if needed. Define roles clearly (e.g., financial secretary handles dues tracking).	In smaller branches, combine compatible roles like financial secretary and treasurer if bylaws allow, to reduce workload.	NALC Constitution on officer requirements. Election Procedures Handbook.
2. Appoint Shop Stewards	Designate stewards for each station/facility to handle frontline grievances.	Aim for 1 steward per 20-30 members; train them on contract defense to distribute leadership.	"Research and Resources for Stewards" workshop.
3. Set Up Committees	Form committees for finance, communications, and events (e.g., charitable drives).	Keep committees small (3-5 members) to encourage participation without overwhelming volunteers.	Branch bylaws; NALC structure overview.

### Phase 3: Member Engagement and Communication (Ongoing, Review Quarterly)

Step	Actions	Tips for Branch	Resources
1. Conduct Regular Meetings	Hold monthly branch meetings (except for December); prepare agendas focusing on updates, grievances, and member input. Keep minutes permanently.	In a small group, make meetings interactive—use polls or open forums to boost attendance (check bylaws for quorum)	"NALC Constitution and Bylaws/Records Management" for meeting protocols. Retain records for 5+ years.
2. Communicate Effectively	Send newsletters, update a branch website/Facebook group, and share dues info or legislative alerts.	Use free tools like email lists; personalize outreach to retain members in a close-knit group.	"Effective Branch Communications" workshop. Members Only portal for tools.
3. Engage and Retain Members	Organize social events, training sessions, and advocacy (e.g., letter-writing campaigns). Address member concerns promptly.	Focus on high-impact activities (summer outing and Christmas party); track engagement via dues payment rates.	NALC apps and resources for member tools.

#### Phase 4: Financial and Administrative Management (Ongoing, Annual Audits)

Step	Actions	Tips for Branch	Resources
1. Oversee Finances	Manage budgeting, dues collection (bi-weekly for actives, quarterly for retirees), and expense reimbursements under accountable plans. File IRS Forms 990 and LM reports annually.	Our branch uses LM-3; bond officers handling funds (aim for % of total assets).	Branch Officer's Guide to Finance and Administration (covers IRS/DoL reporting, bonding). "Managing Branch Finances" workshop.
2. Ensure Compliance and Fraud Prevention	Maintain records (5+ years), use secure filing systems, and conduct audits.	We have dual signatures on checks but never sign for your own; current signatories are Pres/VP/Sec/Tres; review "Fraud Prevention and Detection" for best practices.  Always be prepared for a DOL Audit	LMRDA requirements; "Understanding the LM-3" for reporting.
3. Handle Property and Records	Track branch assets; back up electronic data.	Alphabetize membership files; shred sensitive docs when disposing.	Record retention schedule in finance guide.

#### Phase 5: Representation and Advocacy (Ongoing)

Step	Actions	Tips for Branch	Resources
1. Manage Grievances	Oversee stewards in handling disputes; escalate to National Business Agents if needed.	Train on common issues like discipline or route inspections; resolve 80% locally to save time.	Contract Administration Unit resources; "Guide to Route Inspections."
2. Advocate Politically	Coordinate legislative actions via NALC's action center.	Mobilize members for calls/emails; small branches can punch above weight with unified efforts.	NALC structure guide.
3. Plan for Succession	Mentor officers; follow election rules for smooth transitions.	Hold nominations/elections per handbook; use mail ballots if needed.	Regulations Governing Branch Election Procedures.

#### Key Leadership Principles

- ❖ **Transparency:** Make financial reports available to members; avoid conflicts of interest. We do this by posting on website
- ❖ **Inclusivity:** Encourage participation (many hands make light work) to prevent burnout.
- ❖ **Continuous Learning:** Attend conventions and use NALC's Members Only portal for updates. Train all officers if funds allow. Otherwise, you must train them (or set up a training program locally)
- ❖ **Seek Help:** Contact your National Business Agent or headquarters for guidance. Do this especially with grievances. They can send you resources (step b/arbitration decisions) or advice how to proceed.