



PROFESSIONAL & TECHNICAL ENGINEERS, LOCAL 21, AFL-CIO
An Organization of Professional, Technical, and Administrative Employees

Political Endorsement Process

*(Adopted at the June 7, 2008, Delegate Assembly;
Amended at the January 28, 2012 Delegate Assembly)*

Local 21 IFPTE, its Chapters and Councils, will follow these general guidelines, in conjunction with the Local 21 Principles for Legislative and Political Action, when identifying candidates and issues to support or oppose. The purpose of these guidelines is to ensure that our union makes informed, member-driven decisions when making official endorsements so that they serve the best interests of our members and the governmental jurisdictions where they are employed.

CANDIDATE BRIEFING

To assure that candidates seeking Local 21's endorsement have an in-depth understanding of issues facing our members, a candidate briefing is recommended whenever possible prior to Local 21 consideration. The briefing may be conducted in person, by conference call, or by sending written materials to the candidate. This briefing is to familiarize the candidate with the political and policy priorities of the union's membership. When personal candidate briefings occur, they should be conducted by a committee appointed by and including members of the specific Chapter/Council making the endorsement recommendation.

COUNCIL/CHAPTER CANDIDATE EVALUATION

Candidates may be evaluated through written questionnaires, interviews, candidate forums or other mechanisms as established by the Council/Chapter. Members should be informed in advance of the review process and any candidate events, and candidate questionnaires and other materials should be made available to all members. All members will be encouraged to participate in this process.

COUNCIL/CHAPTER ENDORSEMENT RECOMMENDATION

Council/Chapter endorsement meetings shall be scheduled at a time and place that encourages maximum membership attendance and participation. Endorsement meetings may be conducted during general membership meetings to encourage participation.

Candidates shall be evaluated using appropriate criteria including the Local 21 Principles for Legislative and Political Action and the following considerations:

1. The candidate's record on labor relations issues, employment policies and working conditions
2. The candidate's experience, personal characteristics and leadership qualities
3. The candidate's chances of winning, depth of support and campaign funding
4. The candidate's relationship with the Labor Community in general

Where Chapter or Regional Political Action Committees have been established, they may lead the effort to screen and make endorsement recommendations to the Chapter/Council to the extent that time allows. Chapter/Council endorsement recommendations shall be transmitted to the Executive Committee in writing with a brief explanation of the reasons for the endorsement, including how the candidate or issue is consistent with the criteria listed above and the Principles for Legislative and Political Action, and as much in advance as possible of the Executive Committee meeting at which action on the recommendation is expected.

LOCAL 21 EXECUTIVE COMMITTEE ENDORSEMENTS

In keeping with the Bylaws of the International Federation of Professional & Technical Engineers, Local 21, the Executive Committee shall make all final decisions regarding the endorsement of candidates and supporting or opposing ballot measures, after receiving the recommendation of the Chapter/Council. Individual Chapters and Councils are not authorized to make endorsements or vote to support or oppose ballot measures in the name of Local 21, only to make recommendations to the Executive Committee.

The Executive Committee shall strongly consider Chapter/Council recommendations as well as weigh the good and welfare of the entire Local, when making final decisions on candidate endorsements or voting to support or oppose ballot measures.

The Executive Committee may invite the Chapter/Council to present their recommendations on candidates and ballot measures and to inform the Executive Committee on the process and reasoning behind the Chapter/Council's endorsement recommendations and to discuss any resource allocation requests.

JURISDICTIONAL OVERLAP AND 'DIRECT EMPLOYMENT INTEREST'

Jurisdictional Overlap

Jurisdictional overlap is defined as two different Chapters or Councils operating in the same electoral district and having a shared interest in the outcome of elections involving candidates for office in that district or ballot measures pertaining to that district.

There may be occasions when two or more Chapters or Councils have a jurisdictional interest in an election and may make two different recommendations for a particular election.

If the Chapters are members of the same Council, they shall be resolved through deliberations in the Council in order to arrive at a single, qualified, or dual endorsement to send to the Executive Committee for consideration.

If the Chapters are not members of the same Council or there are two Councils involved in the endorsement, both recommendations shall be forwarded to the Executive Committee who shall make the final decision.

The criteria for resolving "dual" recommendations shall be the normal criteria for endorsements with additional consideration given to any Chapter or Council having a "direct employment interest" in the outcome of the election.

Recommendations on candidates or issues that involve "jurisdictional overlap" that is not within the scope of a Local 21 Regional Council shall be reviewed first by the Local 21 PAC, who shall make a recommendation to the Executive Committee.

Direct Employment Interest

Direct employment interest shall mean that (a) the candidate is running for an office with an agency or jurisdiction that employs Local 21 members in that Chapter or Council, or (b) the ballot measure will have a direct policy or financial impact on Local 21 members in that Chapter or Council.

CAMPAIGN SUPPORT

Endorsement by Local 21 may include a commitment of union activities and/or resources such as the following:

- Direct mail;
- Door-to-door voter education;
- Phone banking;
- Financial contribution(s);
- Letter(s) of endorsement;
- Other campaign activities.

When a Chapter/Regional Council makes a recommendation to endorse or oppose a candidate or ballot measure, it may include a general recommendation to the Local 21 PAC and Executive Committee to provide financial support.

At the beginning of each election cycle, the Local 21 PAC may establish a schedule for Chapters and Councils to submit recommendations on candidates, ballot measures and financial support. The purpose of this schedule is to permit the union to consider as many funding requests as possible at the same time to establish priorities for funding, if necessary. The Local 21 PAC will review the recommendations from the Chapters/Councils and make a recommendation to the Executive Committee at the beginning of each campaign cycle to support, oppose or take no position on each candidate or measure and to provide financial support including the specific level of support. The Local 21 PAC will review requests for funding/support for candidates and ballot measures that are beyond the scope of any single Chapter or Council, and as time allows, funding requests during the year.

The Executive Committee will make a final decision on the level of campaign support based on the specific recommendation of the Local 21 PAC, and other factors such as the general recommendation of the Chapter/Regional Council, the direct strategic importance of the election to the interests of Local 21 members, the strength of the endorsement, the chances of winning, the availability of resources and the level of participation in the PAC and/or campaign volunteer work by the members in that Chapter/Region.

CONTRIBUTIONS AND EXPENDITURES BETWEEN ELECTION CYCLES

The Executive Director may, after consultation with the appropriate Chapter or Regional Council, authorize a contribution of up to \$1,000 towards an event in support of an office holder

who Local 21 has previously supported and/or is in good standing with the local. All such contributions shall be included in the Political Director's next written report to the Executive Committee.

The Executive Director, after consultation with the appropriate Chapter or Regional Council, may purchase tickets up to \$250 to events sponsored by political organizations or elected office holders when it furthers the strategic interests of Local 21 members. All such purchases shall be included in the Executive Director's next report to the Executive Committee.

In cases where there is insufficient time to wait for the next regularly scheduled Executive Committee meeting, the Executive Committee may be polled between meetings on a campaign contribution or endorsement in accordance with adopted policies for polling of the Executive Committee.