

Branch Officers Training



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As previously announced, there will be two Branch Officers Trainings held next month. The first class will be held Jan. 6-9, 2025 in Los Angeles. The second class will be held Jan. 27-30 in Minneapolis, MN.

Branch Officers Training sessions consist of three and a half days of educational classes tailored to assist branch presidents, vice presidents, treasurers, recording secretaries, financial secretaries and trustees in the performance of their duties as an officer.

As a reminder, branches and state associations must use the registration form that was sent out in the *NALC Bulletin* to register for

the session, and no travel plans should be made until an acceptance letter is received. The classes are limited in size and do fill up quickly. Preference is given to officers who have not attended recent training sessions ahead of those who have attended.

If you applied and were unable to get into the January classes, we will offer additional trainings later in 2025.

Branch Officers Training covers the basics for financial officers: reporting to the Department of Labor, fiduciary duties under the Landrum-Griffin Act, bonding and IRS reporting requirements.

Here's an overview of what the three and a half days of training cover:

- **Constitution and bylaws**—This session will cover what is required in branch bylaws and common errors that the Committee of Laws sees when reviewing bylaw submissions.
- **DOL reporting**—This session reviews the history of the Labor-Management Reporting and Disclosure Act (LMRDA) and how it impacts the activities of unions and union officers. Participants will learn about each title of the LMRDA and the reporting requirements under the law.
- **Travel, per diem and reimbursements**—This session is designed to help branches comply with the tricky IRS and Department of Labor (DOL) rules involved in travel payments.
- **Handling MDA funds and PAC funds**—This session will cover the rules for collecting and remitting funds for the Muscular Dystrophy Association and NALC's political action committee.

- **Preparing LM forms and 990s**—Participants will get into the nitty-gritty of completing these required yearly filings with the DOL and the IRS.
- **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 that goes along with signing certain documents.
- **Policies**—This session is designed to identify policies that every branch or state association should have in place.
- **Why minutes matter**—This session will assist 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 will cover the ins and outs of payroll.
- **Recordkeeping**—This session provides an overview of the proper way to keep records consistent with DOL guidelines.
- **Dues and membership**—This session is intended to guide branch officers through membership issues they deal with daily and how to read a dues roster.
- **Fiduciary issues and practices**—This session is designed to give participants practice applying what they learned in the DOL reporting and *Constitution* and bylaws segment.
- **Managing branch finances and creating transparency**—This session is designed to provide 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 the *NALC Regulations Governing Branch Election Procedures*.
- **I was just elected, now what?**—This session is focused on helping officers learn more about branch operations.
- **Risk management and cyber security**—This session is focused on helping officers identify and mitigate possible exposures and ways to address them.
- **Introduction to QuickBooks**—This session is designed to provide guidance on how to use QuickBooks.
- **Innovations**—This session will focus on new programs made available to officers through the Members Only portal.