



## GETTING STARTED:

### Organizing and Maintaining Your Stewards Records

#### Get Organized

It is important for Teamster stewards to develop a good system for organizing all the information and materials that will begin to accumulate—even on a steward's first day.

You will want to develop a file system that will help track issues and grievances and maintain historical files related to grievances, negotiations, organizing and other projects. These files should be cross-referenced by

- **Member Name(s)**
- **Issue(s) or Contract Violation(s)**
- **Date(s)**

Your file system can be established on paper or on a computer. The best system is one that you develop, is easy to update or maintain, and one that can be passed on to others. Your file system should be cross-referenced for easy access at a later date.

Developing a good system will help you and your co-workers be competitive in the information age since the employer has long applied sophisticated techniques to the process of collecting and maintaining information.

#### Record Keeping & Continuity

One day another member will assume your responsibilities as union steward. Organizing the information today for a steward to use sometime in the years to come will be your contribution to building a stronger union.

Information can be a powerful tool in your efforts to advance members' interests on the job. Organizing it and passing it on to your successor ensures that your efforts will continue to make a difference well into the future.

# Setting Up A System: Organizing Important Information

Information is power. There is a host of information that stewards can retain and distribute as they orient new members and keep existing members up-to-date on key issues facing the union. How you organize this information will help you access it in the future.

How best to establish a basic grievance file? You might organize your files as follows:

## ■ **Grievance File**

1. *Name of Grievant(s)*
2. *Date of Hire/Seniority Date*
2. *Issue/Discipline or Non-Discipline Matter*
3. *Contract Language (Article(s), Section(s) )*
4. *Date Occurred, Date Grievance Filed*
5. *Information Requests Pending*
6. *Responses to Information Requests on Grievance*

## ■ **Complaint/Issue File**

1. *Member Name, Title, Department*
2. *Date of Hire/Seniority Date*
2. *Issue*
3. *Date*
4. *Status of Complaint/Issue*

## ■ **New Member Information**

1. *Teamster Privilege Handouts*
2. *Health Insurance Handouts, Forms*
3. *Pension Information*
4. *Information on the Teamsters Union Website*  
*(See <http://www.teamster.org>)*
5. *A new member kit from your Local Union*

## ■ **Card File on Committee, Volunteer Members**

1. *Name, Address, Telephone*
2. *Shift/Department*
3. *Interests, Committees*
4. *Committee Meetings Calendar*

## ■ **Other Useful Information**

1. *Contact Names for Local*
2. *Copies of current Teamster contract, side letters*
3. *Grievance Forms & Fact Sheets*
4. *Authorization cards to sign up new members*
5. *Dues check-off cards*
6. *DRIVE cards*
7. *Seniority List*
8. *Employer Policies, Work Rules, Procedures*

# Chief Steward's Clearinghouse

There are other items that may be best maintained in a central clearinghouse – perhaps under the watchful eye of the Chief Steward. These items may take up a great deal of space or they may be sensitive in nature. In either case, you will want to hold them in a safe or secure area but make them available to stewards who want to review them.

## **The Chief Steward (or Business Agent) Should Maintain:**

- Job Postings, Memoranda on Bidding and Awards**
- List of Job Classifications**
- Seniority List**
- General Information on Local Union**
  1. *Names, Telephone numbers of Local contacts*
  2. *List of Local Union Executive Board Members*
  3. *Standing or Ad Hoc Committee Information*
  4. *Dates on Membership or Craft Meetings*
  5. *Advisories on Local Union Issues, Events*
- Teamster History, Constitution or Local Union Bylaws**
  1. *Copies of the Constitution (or ordering information)*
  3. *Copies of the Local Union Bylaws (or a summary)*
  4. *Information on RISE, IBT Ethical Code of Conduct*
  4. *Teamster Century (published by IBT)*
  5. *Teamster Magazine, Teamster Leader (published by IBT)*
  6. *Contract Updates (IBT Industry Newsletters)*
  7. *Other Local Union, Joint Council or IBT Publications*
- Employer Information**
  1. *Supervisors' Names, Titles, Departments, Telephone Numbers*
  2. *List of employer policies, procedures, work rules*
  3. *Bulletin Board Postings or other advisories*
  4. *Employer Mailings, Newsletters*
  5. *Newspaper Articles on Employer, Industry*
- Collective Bargaining Information**
  1. *Bargaining Notes*
  2. *Committee Meeting Minutes or Records*
  3. *Information Requests/Employer Responses*
  5. *Attendance Records for Bargaining Unit Members*
  6. *Seniority Lists, Other Data*
  7. *Annual Reports, IRS 1099's for Benefit Plans*
  8. *Side Letters related to bargaining*
  9. *Wage Scales, Other Exhibits*
  10. *Job Classifications, Job Descriptions*

□ **General Correspondence**

1. *From the Local Union*
2. *From the Employer*
3. *From benefit plan*
4. *From community organization*
5. *Other*

□ **Laws and Regulations**

1. *Federal, State, Provincial Laws the govern workplace or industry*
2. *Federal, State, Provincial Health & Safety Regulations*
3. *U.S. Department Of Transportation (DOT) Regulations*
4. *Family Medical Leave Act (U.S./FMLA)*
6. *Americans with Disabilities Act (U.S./ADA)*
7. *Canadian Labour Code (CA), provincial statutes*
8. *Other Federal, State, Provincial Laws*



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