

### HOW TO CONDUCT A CHAPTER MEETING

1. CALL MEETING TO ORDER – The presiding officer calls meeting to order.
2. PLEDGE OF ALLEGIANCE – Followed by a moment of silence to honor our fallen veterans & fellow union sisters & brothers.
3. QUORUM – Is seven (7) members, two (2) officers, for a total of nine (9) members present to conduct any official business.
4. READING OF MINUTES FROM PREVIOUS MEETING – Copies can be distributed; Chapter Secretary reads the minutes. Presiding officer asks if there are any corrections or omissions. If none, Presiding officer asks for a motion to accept the minutes, then a second, then asks "All in favor", "any opposed"; if majority in favor, "Motion carried."
5. READING OF TREASURER'S REPORT – Treasurer reads the financial report. Presiding officer asks if there are any corrections or omissions. If none, Presiding officer asks for a motion to accept the financial report, then a second, then asks "All in favor", "any opposed"; if majority, "Motion carried."
6. COMMITTEE REPORTS – Presiding officer asks for report from any standing committees. (Not usually committees unless possibly something special approaching).
7. OLD BUSINESS – Presiding officer asks for any old or unfinished business from the previous meeting.
8. NEW BUSINESS – (Including issues/correspondence) – Presiding officer asks if there is any new business. This is when you discuss issues & correspondence received.
9. GENERAL DISCUSSION – This is where members bring up any items of concern they may have.
10. GOOD AND WELFARE – This is where members can bring up any special recognitions or special needs of the members.
11. ADJOURNMENT – Presiding officer asks "Is there any other business to come before this body"; hearing none, someone makes a motion to adjourn, then second to motion, "All in favor", "any opposed", meeting adjourned at (time).

### ADDITIONAL NOTES:

Sergeant-at-Arms must check everyone in & have them sign up if not a member.  
Keep control of your meeting, call on people to speak so others can hear.  
Watch the time so no one is late reporting for work.

## HOW TO TAKE MINUTES AT A CHAPTER MEETING

1. MEETING IS CALLED TO ORDER by (Name) at (Time)
2. PLEDGE OF ALLEGIANCE and a moment of silence
3. YOU READ THE MINUTES FROM PREVIOUS MEETING – (Name) makes a motion to accept the minutes, (Name) seconds, motion carried.
4. TREASURER'S REPORT (Is read by Treasurer) (Name) makes a motion to accept the report, (Name) seconds, motion carried.
5. OLD BUSINESS – Presiding officer asks for any old or unfinished business from the previous meeting.
6. NEW BUSINESS – (Including issues/correspondence) – Presiding officer asks if there is any new business. This is when they discuss issues & correspondence received.
7. GENERAL DISCUSSION – This is where members bring up any items of concern they may have.
8. GOOD AND WELFARE – This is where members can bring up any special recognitions or special needs of the members.  
  
(For #5, #6, #7, #8, you can make *general notes*, but add anyone's *Name* if it's an important issue, or something that will be followed up; if it is a matter to be voted upon (i.e. sending a gift basket to a member), you must capture their *Name, Motion & who seconds the motion, & the vote outcome.*)
9. ADJOURNMENT – (Name) makes a motion to adjourn, (Name) seconds, meeting adjourned at (time).

(Type what is italicized above.)

### ADDITIONAL NOTES:

If you don't know a member's name for your minutes, ask them to spell it.

The top of the minutes should show the date & time.

It is professional to sign the minutes at the end (i.e. Respectfully submitted, Your Name, Chapter Secretary)

When nominations/casting a vote occur, all the information must be recorded in the minutes. (Call for assistance when that happens!)

Fax 732-247-2474 or email [Local195@local195.org](mailto:Local195@local195.org) a copy of the minutes & sign-in sheet every month to Local 195 Office.

**HOW TREASURER SHOULD REPORT ON CHAPTER FINANCES AT MONTHLY CHAPTER MEETING**

During the monthly chapter meeting, you will report on the chapter's finances to the members directly after the Secretary reads the minutes from the previous meeting.

Your report should be as follows:

Our bank balance at the start of the last month was \$\_\_\_\_\_.

Then read out anything chapter money was spent on:  
We bought refreshments for the chapter meeting that cost \$\_\_\_\_\_.

Read any other expenses; For example, "We sent a get-well gift basket to a sick member for \$25.00."

This quarter we received our per capita check from the Local: \$\_\_\_\_\_.  
(You will receive this check every quarter after filing your quarterly report to the Local Treasurer, & you'll deposit it into the chapter checking account.)

That leaves us with a balance of \$\_\_\_\_\_.

The Chapter President or Presiding officer asks if there are any questions, corrections or omissions. If none, the President or Presiding officer asks for a motion to accept the financial report, then a second, then asks "All in favor", "any opposed"; if majority, "Motion carried."

**ADDITIONAL NOTES:**

Keep track of the chapter's checkbook. It is your responsibility.

Keep all receipts. Receipts must be turned in with your Quarterly Report.

January/February/March	Quarter 1	Quarterly Report due April
April/May/June	Quarter 2	Quarterly Report due July
July/August/September	Quarter 3	Quarterly Report due October
October/November/December	Quarter 4	Quarterly Report due January

Any questions, call the Local Treasurer 732-247-0350.

**MONTHLY TREASURER REPORT**

CHAPTER \_\_\_\_\_

*Fill in the amounts from your bank account statements & read at your chapter meeting.*

Chapter bank balance at the start of the last month was \$ \_\_\_\_\_

Chapter per capita check received from the Local (if any) \$ \_\_\_\_\_

Total on hand: \$ \_\_\_\_\_

Chapter Expenditures (list reasons for expenditures)

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Total expenditures: \$ \_\_\_\_\_

Chapter balance as of this date is (Total on hand minus the  
total expenditures) \$ \_\_\_\_\_

**ADDITIONAL NOTES:**

Keep track of the chapter's checkbook. It is your responsibility.

Keep all receipts. Receipts must be turned in with your Quarterly Report.

Any questions, call the Local Treasurer 732-247-0350.

Report given by:

\_\_\_\_\_  
Chapter Treasurer or Other Chapter Officer

\_\_\_\_\_  
Today's Date

Give this report to the Chapter Secretary to send to the Local Office with Minutes & Sign-in sheet.



## Local 195, IFPTE AFL-CIO Quarterly Financial Report



Approved for payment

Authorized Signature

Chapter Name: \_\_\_\_\_

Date: \_\_\_\_\_

Balance at beginning of quarter: \_\_\_\_\_

+ \$ \_\_\_\_\_

### Income:

Per Capita Received: \_\_\_\_\_

\$ \_\_\_\_\_

Other: (if any): \_\_\_\_\_

+ \$ \_\_\_\_\_

Total Income: \_\_\_\_\_

+ \$ \_\_\_\_\_

Total funds on hand this quarter before expenses and deductions \_\_\_\_\_

\$ \_\_\_\_\_

### Expenses:

### (Brief Explanation)

Rent for meetings: \_\_\_\_\_

\$ \_\_\_\_\_

Refreshments \_\_\_\_\_

\$ \_\_\_\_\_

Travel: \_\_\_\_\_

\$ \_\_\_\_\_

Telephone: \_\_\_\_\_

\$ \_\_\_\_\_

Postage: \_\_\_\_\_

\$ \_\_\_\_\_

Good & Welfare: \_\_\_\_\_

\$ \_\_\_\_\_

Stationery: \_\_\_\_\_

\$ \_\_\_\_\_

Other: \_\_\_\_\_

\$ \_\_\_\_\_

Total Expenses: \_\_\_\_\_

- \$ \_\_\_\_\_

Balance at end of quarter after expenses: \_\_\_\_\_

\$ \_\_\_\_\_

**Note: A copy of this statement along with your bank statement must be sent to the Local Office each quarter.  
Cancelled checks and/or receipts must be kept for your records, as expenditures.**

Signed: \_\_\_\_\_

Signed: \_\_\_\_\_

**(Two Signatures Required: Chapter Treasurer & Chapter President or Designated Officer)**

Preferably we ask that the Treasurer and Chapter President both sign the report. A chapter person (secretary, steward, member) can sign in their place if one is not available. In any case, we must have two signatures.



# **NOTICE**



## **UNION MEETING**

**NEW JERSEY PUBLIC EMPLOYEES**

**LOCAL 195 IFPTE AFL-CIO**

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**CRAFTS – ENGINEERING – MAINTENANCE  
INSPECTION – INVESTIGATION – SECURITY**

**DATE OF MEETING:**

\_\_\_\_\_

**MEETING LOCATION:**

\_\_\_\_\_

\_\_\_\_\_

**TIME:**

\_\_\_\_\_

**INFORMATION/SPEAKER:**

\_\_\_\_\_

**CHAPTER NAME:**

\_\_\_\_\_

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