



May 31, 2023

To: CFT/AFT Locals

From: L. Lacy Barnes
CFT Secretary-Treasurer

Subject: **CFT Staff Funding Assistance Program, 2023-2024**

This cover letter is to help locals successfully apply for the CFT Staff Funding Assistance Program, 2023-2024 (SFAP) and to understand the responsibilities and conditions of participation. Applicant locals should thoroughly read the included section of the **CFT Bylaws** which lays out the authority, purpose and parameters of the program, the **rules and regulations** for implementing the program, and use the **checklist of required documents** to complete the **application** itself to finalize the process.

Included in this application packet are the following:

- CFT Bylaws, Article II, Section 7
- Rules and Regulations for Implementing Article II, Section 7 of the CFT Bylaws
- CFT SFAP, 2023-2024 Application
- Checklist of Required Documentation to accompany CFT SFAP, 2023-2024 Application
- Our Plan to Build A Strong Local Union Form

It is imperative that your attention is focused on several key elements of the program, including the Program's:

1. **Primary purpose**, which is to **minimize use of CFT field representatives** (outlined in Bylaws and Rules and Regulations); the
2. **Conditions of employment**, which include the **services that formula-funded staff are expected to perform** (outlined in Bylaws and Rules and Regulations); and
3. **Essential requirements** (outlined in Bylaws and Rules and Regulations), which include:
 - Local pass-through of AFT and CFT per capitas or percentage dues system,
 - Meeting the minimum conditions of employment of the professional staff¹ (i.e. formula-funded) regarding salary and benefits,
 - Formula-funded staff participation in training programs and work up to 5 days at the request of the CFT,
 - Informing CFT promptly of terminations and layoffs of local formula-funded staff, and
 - Attending all meetings called by CFT, including those to discuss a preparedness plan.

¹ The terms "professional staff" and "formula-funded staff" will be used interchangeably throughout this document.

Failure to satisfy any part of the CFT Constitution, By-Laws may result in reduction or elimination of staff funding.

If your application is received with all requested attachments by **September 1, 2023**, and is in compliance with all requirements as outlined within, it will be automatically approved. The 2023-2024 formula-funded grant is for per capita paid from September 2023 through August 2024 and will be based upon receipt of those per capita. If the application for staff formula-funding is received after September 1, 2023, it will be subject to the review and approval of the Executive Council at subsequent meetings.

Applications should be mailed to the CFT Sacramento Office, 1107 9th Street, Suite 460, Sacramento, CA 95814 or emailed to FundingApplication@cft.org.

The Secretary Treasurer's office and/or your CFT field representative is available to assist you in putting together your formula-funded application, building a budget, crafting an appropriate employment agreement, and preparing financial statements and other required quarterly reports. Strong, effective locals are crucial to a strong CFT, and we look forward to working with you to achieve this goal.

Please do not hesitate to email me (lbarnes@cft.org) or email Leticia Castro (lcastro@cft.org) if you have any questions or concerns.

cc: CFT Executive Council
CFT Field Representative

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CFT BYLAWS PROVISION for Participation in the Staff Funding Assistance Program (Adopted March 2023)

ARTICLE II: Finance

Section 7. - Staff Funding Program

- a. The purpose of the CFT Staff Funding Program is to reimburse those locals that have paid for professional staff in order to minimize the use of CFT field representatives for negotiations, grievances, or other locally specific services. All other general CFT services such as training, publications, member database management, research, communications assistance, legal defense grants, governmental relations, etc. are available to all CFT locals.
- b. Upon application to the CFT, on or before September 1 preceding the CFT budget year for which the staff funding program is to commence, any local or council of locals that directly employs and compensates or pays out of local funds for reassigned time for one or more professional staff persons shall receive, after payment of monthly per capita, a payment for staff funding assistance from the CFT equal to the following formula:
 - 1) **Staff Funding Base**
 - a. Effective September 2023, the Staff Funding Base shall be \$20.91.
 - b. Effective September 2024, the Staff Funding Base shall be \$21.48.
 - 2) **Category 1:** Locals and councils of locals with full-time equivalency (FTE) of per capita paid to the CFT of 1000 or fewer shall receive on a monthly basis a staff funding program from the CFT equal to seventy percent (70%) of Staff Funding Base of per capita paid to the CFT by the local or council of locals.
 - 3) **Category 2:** Locals and councils of locals with FTE of per capita paid to the CFT above 1000 shall receive a staff funding program on a monthly basis from the CFT equal to the higher amount of the following:
 - a. Category 1 for 1000 FTE or,
 - b. Sixty percent (60%) of Staff Funding Base of the FTE of per capita paid to the CFT by the local or council of locals.
 - 4) All locals and councils of locals that have non-certificated employees in their unit or are a unit of classified employees and that qualify for the CFT Staff Funding Program, shall receive staff funding from the CFT equal to seventy percent (70%) of staff funding base of the FTE of per capita paid for non-certificated employees of the unit.
- c. Effective upon adoption of this provision, the base on the Staff Funding Program shall be automatically adjusted on September 1 of each year by the percentage increase in per capita as set forth in Section 2 of this article unless the base is adjusted by a different amount by a vote of

the convention. Convention action to limit the base of the staff funding program cannot be taken in successive years.

- d. Locals and councils of locals that employ part-time professional staff persons shall receive corresponding percentages of the staff funding formula specified in Article II, Section 7b 1), 2), and 3) of the By-Laws on a monthly basis. The staff funding formula per capita base specified in this section shall not include the CFT Legal Defense Fund or the COPE contributions (Article II, Section 1, d and e, By-Laws).
- e. Locals and councils of locals staff working on employer paid release time shall not be covered by the provisions of Article II, Section 7b, 1), 2), and 3) of the By-Laws.
- f. Conditions of employment of formula-funded staff:
 - 1) Professional staff who are directly employed or for whom reassigned time is purchased by the local would generally be expected to perform some of the following services provided by a CFT Field Representative with some assistance from the field representative as needed including but not limited to:
 - a. Designing and running internal membership drives and agency fee campaigns.
 - b. Designing basic flyers and writing basic campaign literature.
 - c. Designing and conducting contract surveys.
 - d. Writing contract language.
 - e. Negotiating collective bargaining contracts using traditional and non-traditional formats and models.
 - f. Analyzing budgets (with some assistance from the CFT Research Department).
 - g. Filing grievances and unfair labor practice charges, representing members at hearings, with assistance from legal counsel, as necessary.
 - h. Assisting in get-out-the vote and related political activities.
 - i. Assisting locals in compliance with national and state affiliate constitutional obligations.
 - j. Troubleshooting, brainstorming and assisting the local in day-to-day activities.
 - k. Advising the local on grievances, arbitrations, negotiations, budgets and concerted activities.
 - l. Conducting training sessions for the local members.
 - 2) The salary rate of any professional staff person provided for in this section shall not be less than the minimum compensation of the full-time employees he/she represents. The salary rate of any professional staff person representing only part-time employees shall not be less than the minimum compensation of the employees he/she represents. The professional staff person shall receive step increases comparable to and on the same timeline as those employees the staff person represents. Locals shall also provide salary column and step advancement to professional staff persons for job-related experience and training.
 - 3) The contributions of the local toward employee benefits and other conditions of employment for directly employed professional staff persons shall be at least comparable to those of the full-time employees he/she represents. The contributions of the local

toward employee benefits and other conditions of employment for any directly employed professional staff person representing only part-time employees shall be at least comparable to the employees he/she represents. When any professional staff person is hired on a less than full-time basis, he/she will receive the pro-rata salary and benefits of the corresponding full-time position.

- 4) The conditions of employment of the professional staff person shall be put to writing in the form of a mutually agreeable contract. The CFT and CFT locals shall seek to provide formula-funded professional staff a group benefits program that includes medical, dental, vision, long-term dis-ability, and retirement benefits.
- g. The Executive Council may recognize a council of locals consisting of locals from a contiguous geographical area, organized for the convenience of participating in the staff funding program. The establishment of these councils shall not affect the autonomy of each local, and each local may send its own delegates to convention and state councils.
- h. As a condition of funding,
 - 1) a local shall implement the pass-through of AFT and CFT per capita increases or have a dues system based on a percentage of salary and notify the CFT of such implementation or system as part of the annual application process,
 - 2) formula funded staff shall participate in training programs and work up to five (5) days, at the request of the CFT, to assist the CFT, other locals or organizing committees.
- i. The Executive Council shall establish rules and regulations for the implementation of this section.

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RULES AND REGULATIONS of the CFT Staff Funding Assistance Program, 2023-2024

The implementation process of the CFT Staff Funding Assistance Program is governed by the following rules and regulations.

I. Application and Approval Process – Required Documents

- A. The CFT Secretary Treasurer shall notify the local or council of locals of the effective date of the commencement of its CFT Staff Funding Assistance Program.
- B. Each local shall submit the Staff Formula-Funding Application, which includes acknowledgements of specific components of the program proscribed by the CFT Bylaws (Article II, Section 7) to the CFT Secretary Treasurer not later than September 1 preceding the CFT budget year for which Staff Funding Assistance program is to commence.
- C. Each local shall submit all the following information and documentation with its completed Staff Formula-Funding Application:
 1. The **proportion of the professional staff person(s)** up to one (1) FTE for which the local intends to employ or buy reassigned time.
 2. A copy of the **employment agreement** between the local and the professional staff person(s) that specifies the compensation and conditions of employment.
 3. A **statement from the local president** that outlines the duties and responsibilities of the professional staff person(s), if not included in the employment agreement.
 4. A copy of the local's complete **Statement of Operating Activity** for the period in which the staff person(s) is to be employed and a current **Statement of Financial Position** (Balance Sheet). The Statement of Operating Activity shall list all anticipated inflows (revenues) and outflows (expenditures) and the Statement of Financial Position shall list all assets and liabilities of the local for the stated period.
 5. A copy of the local's **written organizing plan** that includes member outreach/organizing efforts to achieve and/or maintaining a super majority membership, and to achieve and/maintaining other Vital Signs of a Strong Local Union.
- D. Each local shall submit documentation demonstrating that the **pass-through of AFT and CFT per capita increases** has been (or will be) implemented, or that the percentage of salary collected is sufficient to provide for the per capita increases. For purposes of qualifying for staff funding assistance, recognize that a **local must implement an**

increase equivalent to the pass-through amount of AFT and CFT per capita increases.

- E. Each local satisfying all requirements for staff formula funding and submits its Staff Formula-Funding Application **prior to September 1**, shall be automatically approved. Each local submitting their Staff Formula-Funding Application to the CFT **after September 1** shall be subject to approval by the CFT Executive Council.
- F. The CFT will forward the staff funding to the local or council of locals within 30 days of receipt of the local's monthly CFT per capita payment.

II. Professional Staff Responsibilities and Conditions of Employment

- A. As expressly stated and proscribed by the CFT Bylaws, Article II, Section 7, professional staff who are directly employed or for whom reassigned time is purchased by the local would generally be expected to perform some of the following services provided by a CFT Field Representative with some assistance from the field representative as needed including but not limited to:
 - Designing and running internal membership drives and agency fee campaigns.
 - Designing basic flyers and writing basic campaign literature.
 - Designing and conducting contract surveys.
 - Writing contract language.
 - Negotiating collective bargaining contracts using traditional and non-traditional formats and models.
 - Analyzing budgets (with some assistance from the CFT Research Department).
 - Filing grievances and unfair labor practice charges, representing members at hearings, with assistance from legal counsel, as necessary.
 - Assisting in get-out-the vote and related political activities.
 - Assisting locals in compliance with national and state affiliate constitutional obligations.
 - Troubleshooting, brainstorming and assisting the local in day-to-day activities
 - Advising the local on grievances, arbitrations, negotiations, budgets and concerted activities.
 - Conducting training sessions for the local members.
- B. Compensation and employer contributions toward benefits for professional staff who are directly employed by a local or a council of locals participating in the CFT Staff Funding Assistance Program, must be at least comparable to the employees represented by that local, and the conditions of employment shall be put to writing in form of a mutually agreeable contract.
- C. Professional staff are required to participate in the CFT training program and, at the request of the CFT, are obligated to work up to five (5) days to assist the CFT, other locals, and/or organizing committees.

- D. Local members working on employer paid release time and secretarial/clerical employees of the local, shall not be covered by the provisions of the CFT Staff Funding Assistance Program.
- E. A local or council of locals that terminates, lays off or for any other reason ceases to compensate the local professional staff person during the budget year for which the local or council of locals is receiving CFT staff funding, shall notify the CFT promptly of the last date of employment. The local will cease to be eligible to receive the CFT staff funding the month following the last day of paid service.

III. Quarterly Reporting Requirements

- A. Each local participating in the CFT Staff Funding Assistance Program shall submit the following reports to the CFT **within 45 days after the end of each budget quarter**:
 - 1. A year-to-date **Statement of Operating Activities** showing all revenues and expenditures of the local.
 - 2. A copy of the local's state payroll tax form submitted for the quarter **for salaried employees**. A copy of the end of the year employee's W-2 forms.
 - 3. A copy of the local's report identifying the district release time purchased that shall include the percentage of the release time for each person appearing on the school district's billing, or if not available, a copy of the separate letter from the district to the local specifying the percentage of release time. A copy of the district's billing to the local **and** a copy of the local's check that pays this bill **for district release time purchased from the local's treasury**.

Failure to satisfy any part of these Rules and Regulations may result in reduction or elimination of staff funding.

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CHECKLIST OF REQUIRED DOCUMENTATION to accompany the CFT Staff Funding Assistance Program, 2023-2024

This checklist is included to assist you in completing your application. Be sure to include all required documentation so your application can be approved. If you are submitting an incomplete application, that is, without some of the required documentation, you must submit an explanation regarding these missing items in the space below to process the application for consideration.

- _____ **Employment agreement(s)** of Professional Staff person(s), if applicable
- _____ **Statement of duties for staff person(s)** signed by the local president.
- _____ An **Statement of Operating Activity** detailing anticipated revenues and expenditures. Please indicate when the budget year begins and ends.*
- _____ The most recent **Statement of Financial Position** (Balance Sheet) listing the local's assets and liabilities.
- _____ A copy of the local's entire constitution with "**pass through**" language or a schedule of anticipated dues amount or percentage for 2023-24 to be collected.
- _____ A completed application signed by **both** the president and treasurer.

Explanation:

***Note:** For renewal applications, a year-to-date **Statement of Operating Activity** showing all revenues and expenditures of the local **and supporting payroll/reassigned time documentation** for 2022-2023 must be received through August of 2023.

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APPLICATION for the CFT Staff Funding Assistance Program, 2023-2024

LOCAL NAME: _____ **AFT NUMBER:** _____

1. Regarding the professional staff person the local will employ, in the spaces provided below, please list their **name, job title, and the proportion of time up to one (1) FTE** staff they will be employed with your local. **NOTE:** If the local plans to employ and pay more than one staff person, it must **complete a separate application for each staff person employed.**

NAME of staff person

JOB TITLE of staff person

PERCENT of one (1) FTE staff

HOME ADDRESS of staff person

PHONE NUMBER

EMAIL ADDRESS

2. Please specify the compensation and conditions of employment in space provided below. **Attach the employment agreement between the local and professional staff person.**

a. **Salary per month** _____

Fringe benefits _____

b. **Effective date of employment** _____
(Note: If there has been no break in employment, state “**Continuing.**”)

c. **Total months of employment yearly** _____

3. Please specify anticipated annual income and proposed expenditures. **Attach the local’s Complete 2023-24 budget** and current **Statement of Financial Position.** This financial statement must indicate the local’s **budget year**, and list all the local’s **assets** and **liabilities.**

4. For the years indicated, please identify the local dues amounts. If there are different dues amounts for the different units represented, please identify accordingly. **Attach all dues schedules** with application.

Unit name/type: _____	<u>Monthly</u>	<u>Yearly</u>
2022-23	_____	_____
2023-24	_____	_____

Unit name/type: _____	<u>Monthly</u>	<u>Yearly</u>
2022-23	_____	_____
2023-24	_____	_____

5. Indicate the **total number of bargaining unit members** in the local. → _____
 (If local represents different unit members, please separate by unit type below.)
- Unit type: _____
- Unit type: _____

ACKNOWLEDGEMENTS

Acknowledge your local union’s **reading, understanding and agreement** of each component the CFT 2023-2024 Staff Funding Assistance Program, as per CFT Bylaws (Article II, Section 7) and SFAP Rules and Regulations by affixing your initials next to each of the following items:

_____ Our local union **acknowledges and agrees** to minimize the use of CFT field representatives for negotiations, grievances, or other locally specific services, and further **understand** that other general CFT services such as training, publications, member database management, research, communications assistance, legal defense grants, governmental relations, etc. are available for local use.

_____ Our local union **acknowledges and understands** that professional staff persons, also known as formula-funded staff, are **generally expected to perform some of the following services** including but not limited to:

- a. Designing and running internal membership drives and agency fee campaigns.
- b. Designing basic flyers and writing basic campaign literature.
- c. Designing and conducting contract surveys.
- d. Writing contract language.
- e. Negotiating collective bargaining contracts using traditional and non-traditional formats and models.
- f. Analyzing budgets (with some assistance from the CFT Research Department).
- g. Filing grievances and unfair labor practice charges, representing members at hearings, with assistance from legal counsel, as necessary.
- h. Assisting in get-out-the vote and related political activities.
- i. Assisting locals in compliance with national and state affiliate constitutional obligations.
- j. Troubleshooting, brainstorming and assisting the local in day-to-day activities
- k. Advising the local on grievances, arbitrations, negotiations, budgets and concerted activities.
- l. Conducting training sessions for the local members.

_____ Our local union **acknowledges that it has read and will follow** the salary, benefit, and conditions of employment requirements as outlined in the CFT Bylaws (Article II, Section 7) and the Staff Funding Program Rules and Regulations regarding the hiring of directly employed professional staff under the program.

_____ Our local union **acknowledges that it has read and will follow** the dues requirements as outlined in the CFT Constitution and Bylaws.

_____ Our local union **acknowledges and will ensure** that formula-funded staff **will participate** in CFT training programs and work up to five (5) days (e.g. participating in campaigns), at the request of the CFT, to assist the CFT, other locals or organizing committees, as per the Bylaws. We further **acknowledge and will encourage** formula-funded staff to attend the formula-funded staff meetings each semester, or whenever called.

We, the undersigned, also **acknowledge receipt and review** of the most recent and currently adopted CFT Bylaws and the Staff Funding Assistance Program Rules and Regulations detailing the purpose of and conditions for participation in the 2023-2024 CFT Staff Funding Assistance Program, and do hereby apply.

Signature of Local President

Signature of Local Treasurer

Date

Date