




June 3, 2024

To: CFT/AFT Locals
From: L. Lacy Barnes 
CFT Secretary-Treasurer
Subject: **2024-25 CFT Staff Funding Assistance Program**

This cover letter is to help locals successfully apply for the CFT 2024-25 Staff Funding Assistance Program (SFAP) and to understand the responsibilities and conditions of participation. Applicant locals should thoroughly read the included section of the **CFT Bylaws, Article II, Section 7**, which lays out the authority, purpose and parameters of the program (pages 3-5) and the **SFAP Rules and Regulations** for implementing the program (pages 6-8). Applicant locals should use the **checklist of required documents** (page 9) to complete the **SFAP application** (pages 10-12) to finalize the process. Applicant locals will also be required to submit a **plan to build a strong local union** (pages 13-14).

It is imperative that your attention is focused on four key elements of the program, including the Program's primary purpose, conditions of employment, essential requirements and expectation of locals.

1. The **PRIMARY PURPOSE** of the program is to **minimize use of CFT field representatives**. This element is mandated by the CFT Bylaws and the SFAP Rules and Regulations.
2. The **CONDITIONS OF EMPLOYMENT** of the program are in regard to the **services that formula-funded staff are expected to perform**. This element is also mandated by the CFT Bylaws and the SFAP Rules and Regulations.
3. The **ESSENTIAL REQUIREMENTS** of the program, as mandated in the CFT Bylaws and the SFAP Rules and Regulations **must** be met by the local, which include the following:
 - Implementing the pass-through of AFT and CFT per capita or having a percentage dues system;
 - Meeting the minimum conditions of employment of the professional staff¹ (i.e. formula-funded) regarding salary and benefits;
 - Compulsory participation of professional staff in CFT designated training programs and CFT designated work of up to 5 days at the solicitation of the CFT;
 - Informing CFT promptly of any and all terminations and layoffs of local professional staff; and,
 - Attending all meetings for formula-funded locals called by the CFT, including those to discuss a preparedness plan.
4. The **EXPECTATION OF LOCALS** of the program is that it sends local member delegates to all CFT governance meetings including Division Councils, State Councils and Conventions.

Failure to satisfy any part of the mandated sections of the CFT By-Laws and SFAP Rules and Regulations **may result in reduction or elimination of staff funding**.

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

If your application is received—with all requested attachments—***on or before* September 1, 2024**, and is in compliance with all requirements as outlined within, and will be automatically approved. The 2024-25 staff funding grant is for per capita paid from September 2024 through August 2025 and **will be based upon receipt of those per capita**. If your application for the 2024-25 staff funding grant is received ***after* September 1, 2024**, it will be subject to the review and approval of the Executive Council at one of its 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 staff funding application, building a budget, crafting an appropriate employment agreement, and preparing financial statements and other required quarterly reports.

CFT recognizes that strong and effective locals are crucial to ensure a strong CFT; we look forward to working with you to achieve this end.

Please do not hesitate to email me (lbarnes@cft.org) or 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

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 [emphasis added]*. 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 [emphasis added to focus attention on the 2024-25 rate]*.
 - 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 *[emphasis added]*:
 - 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. [emphasis added].***
 - 3) ***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 [emphasis added].*** 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.

- 4) ***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 represent [emphasis added]. 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 [emphasis added].*** 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.
 - 5) ***The conditions of employment of the professional staff person shall be put to writing in the form of a mutually agreeable contract [emphasis added].*** The CFT and CFT locals shall seek to provide formula-funded professional staff a group benefits program that includes medical, dental, vision, long-term disability, 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 [emphasis added],***
 - 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 [emphasis added].***
- i. ***The Executive Council shall establish rules and regulations for the implementation of this section [emphasis added].***

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RULES AND REGULATIONS of the 2024-25 CFT Staff Funding Assistance Program

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 maintain a super majority membership, and to achieve and/maintain 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 [emphasis added].***

- 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 2024-25 CFT Staff Funding Assistance Program.

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.

- _____ 1. A copy of the local’s entire constitution with “**pass through**” language or a schedule of anticipated dues amount or percentage for 2024-25 to be collected.

- _____ 2. A **Statement of Operating Activity** detailing anticipated revenues and expenditures. Please indicate when your local’s budget year begins and ends.*

- _____ 3. The most recent **Statement of Financial Position** (Balance Sheet) listing the local’s assets and liabilities.

- _____ 4. **Employment agreement(s)** of professional staff person(s), if applicable.

- _____ 5. **Statement of duties** for professional staff person(s) signed by the local president.

- _____ 6. A completed application signed by **both** the local 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 2023-2024 must be received through August of 2024.

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APPLICATION for the 2024-25 CFT Staff Funding Assistance Program

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

1. Regarding the professional staff 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 will be employed with your local. NOTE: If the local plans to employ and pay more than one staff person, please **complete a separate application for each staff person employed.**

NAME of professional staff

JOB TITLE of professional staff

PERCENT of one (1) FTE staff

HOME ADDRESS of professional staff

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 2024-25 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 below, 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>
2023-24	_____	_____
2024-25	_____	_____

Unit name/type: _____	<u>Monthly</u>	<u>Yearly</u>
2023-24	_____	_____
2024-25	_____	_____

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 2024-25 CFT Staff Funding Assistance Program, as mandated by 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 mandated by the CFT Bylaws (Article II, Section 7) and the SFAP 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 mandated by 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 mandated by the CFT Bylaws. We further **acknowledge and will encourage** formula-funded staff to attend the formula-funded staff meetings each semester, or whenever called.

_____ Our local union **acknowledges and will ensure** that it will send local member delegates to all CFT governance meetings including Division Councils, State Councils and Conventions.

We, the undersigned, also **acknowledge receipt and review** of the most recent and currently adopted CFT Bylaws and the SFAP Rules and Regulations detailing the purpose of and conditions for participation in the 2024-25 CFT Staff Funding Assistance Program, and do hereby apply.

Signature of Local President

Signature of Local Treasurer

Date

Date

Our Plan to Build A Strong Local Union

CFT Staff Funding Program Application for 2024-25: Written Plan Template



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1. BARGAINING UNIT SIZE: _____

2. WHAT WILL MAKE 2024-25 A GREAT YEAR FOR BUILDING A STRONG LOCAL UNION?

PLANNING AREAS* VITAL SIGNS of a STRONG LOCAL UNION <i>(see attached document "Vital Signs of a Strong Local Union" for full version)</i>	CURRENT BASELINE	GOALS FOR THIS YEAR **	KEY TACTICS/ACTIVITIES THAT WILL GET US TO OUR GOAL	POINT PERSON to ensure we stay on track
Super Majority Membership* At least 80% of the bargaining unit has joined the union, with a goal and plan to reach 90% membership.				
Worksite/Department Leadership Structure* A member-to-member structure is in place at every site/department with 1 respected, trained, and active worksite leader for every 10-15 bargaining unit members. Training is regularly held to strengthen the knowledge and organizing skills among all union leaders.				
Member Participation* A majority of bargaining unit members are active in the union as demonstrated by attending union meetings, completing union surveys, participating in union actions, and volunteering for union responsibilities.				
Member Communications* Face-to-face conversations are regularly conducted throughout the union. A member-to-member worksite communications network is established with a 1:5 ratio. New employees are personally contacted as soon as they start. Union news and leaflets are regularly distributed to every bargaining unit member in person, in print, and electronically.				
Member Database and Charts* An accurate and complete list is maintained of all bargaining unit members by site/department with membership and COPE status, non-work contact information, union participation info and other information to help organize a stronger union. Each campus, worksite, and department is charted.				
Focused Resources* The local union's focus and financial resources are aligned to build an organized and involved membership.				
Other Vital Signs (optional)				

* **Required Planning Areas:** These are required areas of the written plan for the CFT Staff Funding Program. Local unions are encouraged to reference the CFT Vital Signs of a Strong Local Union. Please contact the CFT for planning support.

** **Goals:** Your annual goal should aim to make progress from your current baseline. Goals should be measurable -- reasonable people should be able to agree on whether or not you met your goal. So, paint a clear finish line, with number goals or specific qualitative descriptors. (For instance, "get in shape" is not particularly measurable, but "run a 5K race in under 35 minutes" is. Similarly, "Increasing member participation" is not particularly specific, but "at least 75% of members will participate in at least two activities in support of winning a fair contract" or "15% more members will attend the General Membership Meetings than last year" are both quite measurable.)

3. LOCAL UNION STAFF & STRUCTURE *(Please include a response to these questions with your application.)*

- A. Describe the specific role and responsibilities Formula-Funded Staff will play to advance these goals, implement the plan, and get results.

- B. What structure and financial resources does your local union currently have in place to support an effective member outreach and organizing program?

- C. What process will you use to track your progress and check-in on the plan throughout the year?

- D. What additional training and technical assistance will you need to successfully execute your plan?

- E. How will you share this plan and involve other worksite leaders in carrying it out?

4. OUR GOVERNANCE TEAM SUPPORTS THIS PLAN

Our local union’s governance team has discussed and approved this plan to build a strong local union. **Signature of local union president, plus two local union officers.**

_____ **Local Union President**

_____ **Local Union Officer**

_____ **Local Union Officer**

RESOURCE: QUESTIONS FOR LEADERSHIP TEAM DISCUSSION DURING PLANNING PROCESS *(These are simply sample questions for your leadership team to consider discussing as you finalize your local union plan. They do not need to be submitted with your application.)*

- 1. Are the goals ambitious enough? Do they represent significant progress?
- 2. How realistic are these goals? Do we have implementation plans to achieve them with timelines and point people? Will the tactics listed be sufficient to drive the growth we need?
- 3. Does our plan include specific steps we will take to boost personal communication across our union, ensure that we talk with all new employees, & have a formal orientation?
- 4. If we achieved these goals, would this be a successful year? Will they help our local union deliver gains for our members, our students, and our communities?
- 5. Other questions we should discuss during our planning process?

Local unions are encouraged to reference the attached CFT Vital Signs of a Strong Local Union. Please contact the CFT for additional planning support.