



Guidelines for Setting Up and Administering an ATU-COPE Program at Your Local

■ GENERAL GUIDELINES FOR ATU-COPE

WHO MAY BE SOLICITED FOR COPE CONTRIBUTIONS?

Only ATU members and their families may be solicited for COPE contributions.

HOW MAY THE COPE CONTRIBUTIONS BE SOLICITED?

Solicitations may be made in person, by telephone, by mail, in *internal* union publications, at Conventions, through payroll deduction, or through fundraising events and special promotions. Only VOLUNTARY contributions may be accepted. When soliciting persons for contributions, a local must inform contributors of ATU-COPE's political purpose. In addition, a local may not require a minimum amount. A local may suggest a minimum contribution but must state that the amount is just a suggestion.

ARE THERE ANY LIMITS ON THE AMOUNT THAT MAY BE CONTRIBUTED?

No one can contribute more than \$5000 in a calendar year.

WHAT ARE COPE CONTRIBUTIONS USED FOR?

ATU-COPE contributions are used to make contributions and expenditures for candidates for federal, state and local office.

HOW MAY COPE CONTRIBUTIONS BE REMITTED?

Voluntary COPE contributions may be remitted to the ATU COPE program in any legal medium of exchange. This is usually in the form of a check or money order made payable to "ATU-COPE."

WHEN MUST COPE CONTRIBUTIONS BE REMITTED?

All ATU Locals are required, by federal law, to transmit all voluntary contributions received from members for federal elections to the International Office within 30 days of receipt or within 10 days for individual amounts over \$50. Under no circumstances should COPE contributions be comingled with existing local general treasury accounts.

WHAT INFORMATION MUST ACCOMPANY THE COPE CONTRIBUTIONS?

Along with each forwarded contribution, ATU Locals must submit the following information:

- A) Contributor's full name (in alphabetical order);
- B) Amount of current contribution;
- C) Employee's year to date contributions (optional);
- D) Pay period for which the withholding was made;
- E) Date of remittance.

MAY A LOCAL KEEP COPE CONTRIBUTIONS?

Except where a local union or conference board has received the express written authorization of the International Office, all COPE contributions, whether received through COPE check-off or otherwise, should be remitted to the International Office.

MAY A LOCAL REQUEST CONTRIBUTIONS BE MADE TO A SPECIFIC CANDIDATE?

Yes! Under our longstanding policy, up to 50 percent of the funds contributed each two-year election cycle by each local to ATU-COPE will be returnable that cycle on an "as needed" basis for contributions to state and local candidates. Election cycles begin in odd numbered years (e.g. 2009) and continue through the end of the following even numbered year (e.g. 2010).

We have prepared a standard local COPE request form, which is included in this packet. **While locals may suggest that a contribution be made to a candidate for federal office, the International Office will make the final determination on whether and how much to contribute to any federal candidate.**

Please note, we will not accept contribution requests received less than two weeks prior to the date of the election for which the contribution is requested.

■ GUIDELINES FOR ATU-COPE CHECK-OFF

HOW CAN WE START A COPE CHECK-OFF PROGRAM AT OUR LOCAL?

As you negotiate for dues check-off in your contract, you can also negotiate for COPE check-off. It is the same process for the company. Once you sign up a member for a check-off contribution, you don't have to ask again and again every year.

Sample COPE check-off contract language is below:

"The employer agrees to deduct from the wages of any employee who is a member of the Union an ATU-COPE deduction as provided for in a written authorization. Such authorization must be executed by the employee and may be revoked by the employee at any time by giving written notice to both the employer and the Union. The employer agrees to remit any deductions made pursuant to this provision promptly to the Union together with an itemized statement showing the name of each employee from whose pay such deductions have been made and the amount deducted during the period covered by the remittance."

WE HAVE NEGOTIATED COPE CHECK-OFF LANGUAGE, MAY WE START WITHHOLDING FUNDS?

No. Federal, state and local laws prohibit the withholding of non-mandated funds from an employee's earnings without a written voluntary authorization from the employee. The withholding of COPE contributions is governed by these laws.

HOW DO WE OBTAIN THE REQUIRED VOLUNTARY WRITTEN AUTHORIZATION?

In order to insure the orderly withholding of COPE funds and to comply with all legal requirements, we have prepared a standard check-off authorization card, which is attached to the ATU-COPE Brochures. These cards are available free of charge from the International Office. These cards must be signed by the member and submitted to the employer before a check-off may begin. **The local must keep a copy of all signed check-off cards.**

MAY SUBSTITUTE FORMS BE USED?

Yes. In the event an employer will not accept this card, substitutes may be used; however, before such substitute cards are employed, they should be submitted to the International for review. REMEMBER, the laws are very specific in their requirements for voluntary withholding of funds to be used for political purposes.

HOW LONG IS A SIGNED AUTHORIZATION CARD VALID?

A properly signed and executed COPE check-off authorization card's length of validity is dependent on its terms and any applicable state law. Withholding can only change or cease upon the employee's execution of a new card changing the amount to be withheld or by written request to the employer to cease withholdings.

HOW OFTEN CAN WITHHOLDINGS BE MADE?

Withholdings can be made on any basis stipulated on the authorization form by the employee and agreed to by the employer.

■ REMITTING OF COPE CHECK-OFF WITHHOLDINGS

HOW MAY WITHHELD FUNDS BE REMITTED?

Funds withheld for voluntary COPE contributions may be remitted to the ATU COPE program in any legal medium of exchange. This is usually in the form of a check or money order made payable to "ATU COPE".

WHEN MUST WITHHELD FUNDS BE REMITTED?

The law requires that voluntary contributions to the ATU COPE program be forwarded within 30 days of the date contributed or within 10 days for individual contributions of \$50 or more. Where contributions are received through check-off, the date of the contribution is the day the paycheck is distributed to the employee. If this date is different from the date on the check, this information must be reported to the International Office when the contribution is forwarded.

WHAT INFORMATION MUST BE INCLUDED WITH THE REMITTED COPE CHECK-OFF FUNDS?

As with all voluntary contributions, the following information is required when COPE check-off funds are remitted to the International:

- A) Each contributor's full name (in alphabetical order);
- B) Amount of current contribution;
- C) Each employee's year to date contributions (optional);
- D) Pay period for which the withholdings was made;
- E) Date of remittance.

MAY THESE WITHHOLDINGS BE INCLUDED WITH THE DUES CHECK-OFF REMITTANCES?

Federal law prohibits the mingling of voluntary COPE funds with any other funds. As such, remittances should be separated from dues and other check-off funds. If the employer issues separate COPE and dues checks, then the COPE check should be forwarded directly to the International along with the required information, listed above. If, however, the employer issues only one check containing both dues and voluntary COPE contributions, the local should establish separate bank accounts for the funds and should arrange for its bank to split-deposit the combined check and deposit the proper portion directly into the separate treasury and political funds accounts. Once the voluntary COPE check-off funds are separated from the dues money, they should be forwarded directly to the International along with the required information.

■ COPE AWARDS PROGRAM

WHAT IS THE ATU-COPE AWARDS PROGRAM?

The COPE Awards Program is a multi-part program designed to give recognition to those individuals who have given freely to promote the causes of the program and to the local unions to which those members belong.

WHAT ARE THE INDIVIDUAL AWARDS?

Individual member awards are based on the amount actually contributed by the individual each year (January 1 - December 31). The categories are as follows:

PRESIDENT'S CLUB AWARD (annual contribution of \$25 or more) - a unique silver lapel pin fashioned after one of the vehicles driven by our members and membership into the President's Club.

STATESMEN'S CLUB AWARD (annual contribution of \$50 or more) - a silver and blue lapel pin and membership into the Statesmen's Club.

CENTURY CLUB AWARD (annual contribution of \$100 or more) - a gold lapel pin embossed with "100" and membership into the distinguished Century Club.

CONGRESSIONAL CLUB AWARD (annual contribution of \$250 or more) - a unique gold lapel pin embossed with "250" and membership in the prestigious Congressional Club.

PATRIOT'S CLUB AWARD (annual contribution of \$500 or more) a distinctive jeweled, gold lapel pin embossed with "500" and membership in the coveted Patriot's Club.

These awards, limited in number, are available only through participation in the ATU-COPE program and then only during the current year. The lapel pins, each bearing the date of the current year's program, are changed annually. Club participation is determined automatically by the submission of your monthly COPE reports.

WHAT IS THE ATU-COPE PATRIOT AWARD?

The ATU-COPE Patriot Award is awarded each year to the individual ATU member who contributed the highest dollar amount to ATU-COPE that year. The Patriot Award winner receives an engraved wall plaque.

WHAT ARE THE LOCAL UNION AWARDS?

Each year, the local which contributes the highest dollar amount to the ATU-COPE program, as compared to locals within the same membership size category, is awarded **the Chairman's Award**. Likewise, the local union with the highest percentage of its active members enrolled in an ATU-COPE Club, as compared to locals within the same membership size category, is awarded **the President's Award**. These award winners receive an engraved wall plaque and special recognition at the next convention.

The membership size categories are as follows:

- A) Membership of 50 active members or less,
- B) Membership of 51 active members to 200 active members,
- C) Membership of 201 active members to 800 active members,
- D) Membership of 801 active members to 1,500 active members, and
- E) Membership of 1,501 active members or more.

ARE THEIR ADDITIONAL INCENTIVES AVAILABLE FOR LOCALS TO PROVIDE TO COPE CONTRIBUTORS?

Yes. ATU will return to each local division every dollar contributed above their 2010 contribution level for the purpose of conducting grassroots campaigns in their community targeted at restoring transit service that has been cut in recent years, fighting privatization, and other progressive efforts aimed at getting our members back to work. Moreover, in an effort to further encourage locals to increase their ATU-COPE levels above last year, we are also matching the money sent back to each local, dollar for dollar. This special program will apply during 2011.

In addition, the International will, upon request, provide locals with a limited number of ATU-COPE Lapel Pins free of charge, for use in local COPE fundraising drives. In addition, locals may purchase additional incentives from the International, at a reduced price. Available incentives will change each year. Lapel pins and incentives may be ordered using the ATU-COPE Order Form included in the COPE Kit.