



INTERNATIONAL ASSOCIATION OF FIRE FIGHTERS

THE ROLE OF THE LOCAL SECRETARY

(it ain't sexy but it's important)

STRIVE FOR EXCELLENCE - 2026

WELCOME

TODAY'S TEAM

Bill Dodd

- Past Secretary-Treasurer
- Coeur d'Alene, ID L0710
- Consultant with GST

Tory Fatjo

- 12th District DFRS
- Broward County, FL Local 4321



TODAY'S TEAM

Matthew Tomek

- Secretary-Treasurer
- Memphis Fire Fighters Local 1784

Matthew Petro

- Secretary-Treasurer
- Boone County IN Fire Fighters Local 5195



TODAY'S TEAM

Frank Ramagnano

- IAFF AGST of GST Operations
- Toronto, ON Local 3888

Doug Stern

- IAFF Director of GST Operations
- Cincinnati, Ohio Local 48

Ryan Weber

- IAFF Comptroller



LEARNING OBJECTIVES

- Gain a better understanding of the primary duties and responsibilities of local union secretary.
- Learn about tactics and strategies that are used by successful secretaries
- Understand how to navigate the Local Dashboard at iaff.org.



GST OFFICE STAFF

GST FRANK LIMA

COO JIM BRINKLEY

EX ASST TERESA ALVA

GST SUITE

**EMILY PRESTON
KRISTYN BRINKLEY
KAYLA VALENCIS**

OPERATIONS

**AGST FRANK RAMAGNANO
DIRECTOR DOUG STERN**

**RONNIE MUFFLEY
RICK IACINO**

FINANCE/ACCOUNTING

**AGST RYAN WEBER
DIRECTOR KATY FISHER
DEP DIR KATHY TOMLINSON**

**BONITA BROWN
PEGGY CHASE
GENE WU
CLEMENTINE MUGOP
CINDY RYAN**

GENERAL ADMINISTRATION

**AGST MAUREEN GREEN
DEP DIR DEMETRIUS WILLIAMS**

**NICOLE RICE
ANGELA TRESSLER
ALLIE IACINO
NIGZA IRIZARRY
JERI SMITH
GABRIEL COOMBES
YOHN LYLES**

HUMAN RESOURCES

**DIRECTOR MATTHEW SZLAPAK
STACY CARTER
RACHEL CLARK**



Secretary

vs

Treasurer

SECRETARY VS TREASURER

- Some overlap of duties.
- Many locals have a combination role of Secretary-Treasurer.
- Your local Constitution should outline the duties of each position.



SECRETARY DUTIES



Custody of all documents



Minutes



Seal of the local

Secretary



Correspondence



Maintain Official List of Members



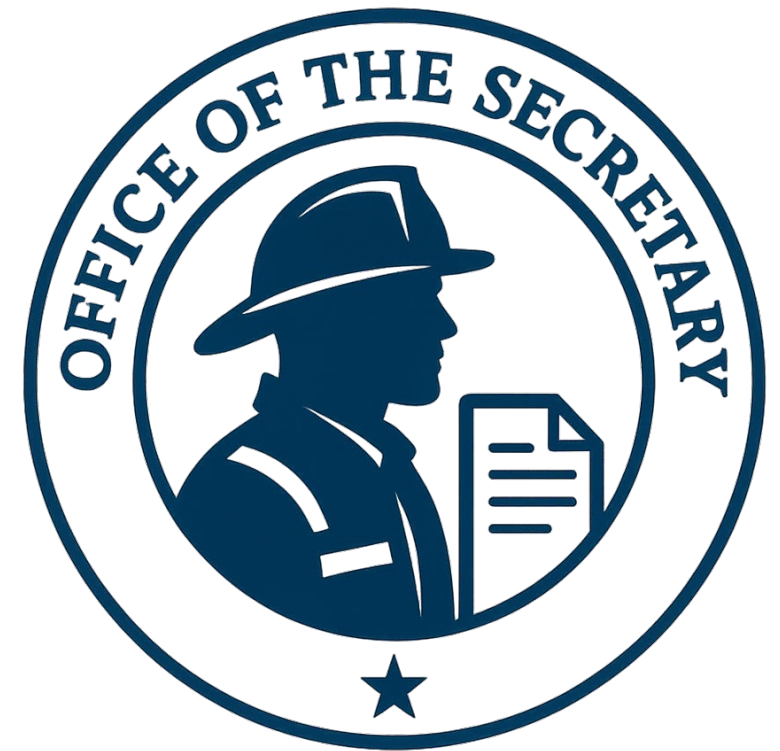
Maintain records



PRIMARY SECRETARY RESPONSIBILITIES

The primary responsibility for **record keeping, roster management, and communications** within the local rests with the local union secretary.

The secretary performs their duties by **recording the minutes, conducting correspondence, and by providing necessary information to fellow officers.**



TREASURER DUTIES



Investments

Treasurer



Audits



Reports to Membership,
Board, and IAFF



PRIMARY TREASURER RESPONSIBILITIES

The primary responsibility for the **financial health of the local** rests with the local union treasurer.

The treasurer collects all money due to the local, including member dues, pays all bills, including per capita, pays taxes, cares for the fiscal well-being of the local, and is responsible for filing all records and filing with appropriate government agencies.



WORDS WE USE MATTER

Dues = Per Capita or Investment in Union

THE Union = OUR Union



MEMBER COMMUNICATIONS

Meetings: Treasurer's Financial Report

Email: Regular Updates, Simple Updates, Asks

Texts: More Immediate Call to Action

Station Visits: Deeper Explanation, Answer Questions

Newsletters: Simple Updates, Overviews

Website: Behind Log In, More Complex Information



RECORD KEEPING

What is a record?

Why keep records?

What to keep?

How long should records be kept?

Where should files be kept?

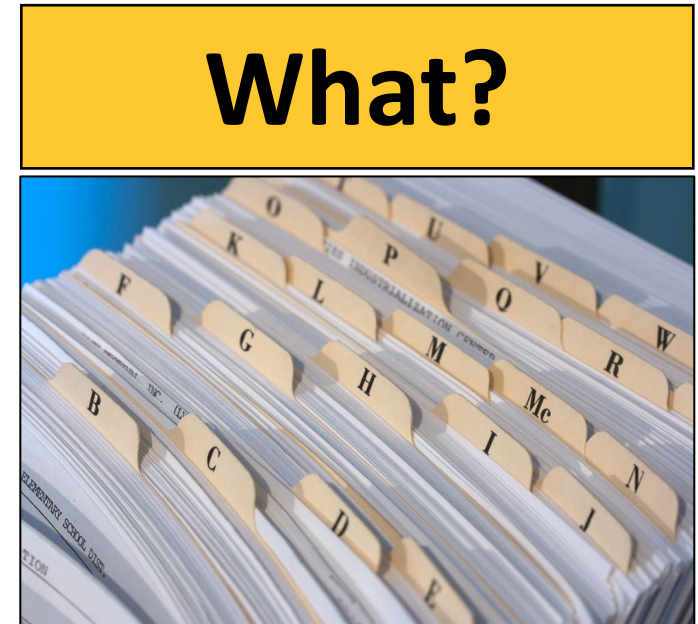


WHAT IS A RECORD?

A record is any and all materials created, received or used for the official business of an organization.

Records consist of all the materials that your local generates itself, including:

- Meeting agendas and minutes
- Financial documents and reports
- Operational docs (labor – management)



WHY KEEP RECORDS?

Provides an accurate, unbiased record of the history of your local.

Accurate and appropriate records are a requirement of the IAFF, Federal laws, the Internal Revenue Service and is a good business practice.

When conducting a financial inspection or audit, often an accountant or the IRS will first request the Local Minutes Book. This is because the Minutes usually reflect both the ordinary and extraordinary financial activities of the local.



WHAT TO KEEP?

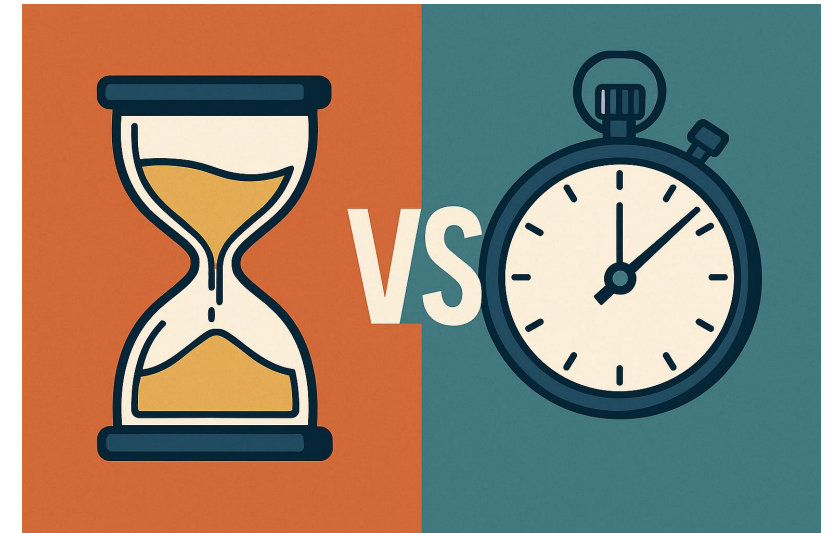
Good office management, as well as governmental requirements, calls for an adequate filing system to maintain a local's records.

There are several filing methods (i.e., alphabetically, by vendor, by month received).



HOW LONG SHOULD RECORDS BE KEPT?

DOCUMENT TYPE	RETENTION PERIOD
Accounting Records (Invoices, Ledgers, Bills of Sale, Checks, Vouchers)	7 years
Advertisement For Job Openings	3 years after posting
Annual Financial Reports (Including Investments and Trusts Controlled By IAFF)	Permanently
Applicant Records For Non-Hires	3 years after receipt
Arbitration Awards (As Employer)	Permanently
Arbitration Awards (As Bargaining Agent)	Permanently
Audit Reports	10 years
Bank Statements	7 years
Bargaining History (Notifications, Proposals, Notes, etc.) for Ongoing Relationship	Indefinitely
Bargaining History (Notifications, Proposals, Notes, etc.) for Defunct Relationship	End of relationship + 7 years
Benefit Plan Documents (As Employer)	Permanently
Benefit Plan Documents (As Bargaining Agent)	Permanently
Bills Of Sale	Permanently
Bonds	Permanently
By-Laws, Constitutions, Resolutions, Convention Reports	Permanently
Charter For Local or Other Affiliate	Permanently
Collective Bargaining Agreements, MOUs, Side-Letters, etc. ²	Permanently
Contracts (Non-CBA Contracts – e.g. Agreements with Vendors)	Completion + 7 years
Court Orders	Permanently
Deeds And Titles	Permanently



HOW LONG SHOULD RECORDS BE KEPT?

DOCUMENT TYPE	RETENTION PERIOD
Dues Receipts	7 years
Dues Objectors Letters (Incoming)	Date or receipt + 10 years
Dues Objectors Letters (Outgoing, and Any Check Stub)	Permanently
EEO – 1 & 3 Reports (If Applicable)	Filing + 2 years
Election Of Officers Records (Including Unused Ballots)	2 years
Employee/Officer Expense Reports	7 years
Employee Handbook and Policies (As Employer)	Date superseded + 10 years
Employee Job Descriptions	Date superseded + 3 years
Employee Payroll Records	7 years
Employee Time Sheets (And Other Time Records)	3 years
Executive Board Meeting Minutes and Polls/Vote Records	Permanently
Federal Grants Records	End of grant + 7 years
Financial Records (Unless Otherwise Specified)	7 years
Grievances And Complaints Against the IAFF (As Employer)	Resolution of Grievance + 7 years
Grievances And Related Files (As Bargaining Agent)	Resolution of Grievance + 5 years
Grievance Settlements (As Employer)	Permanently
Health Insurance Claims (As Employer)	Resolution + 3 years
IAFF PAC Reports	3 years
Individual Employee Benefit Election Forms and Documents (As Employer)	Permanently
Individual Personnel Files (Except Benefit Election Forms)	End of Employment + 5 years
Insurance Policies	7 years
Investment And Trusts – Reports Filed by IAFF As Controlling Entity	Permanently

IRS Exemption Determination Letters and Related Correspondence	Permanently
LM-1, LM-2/LM-3 Reports and Canadian Equivalents	Permanently
LM-1, LM-2/LM-3 Report (And Canadian Equivalent)	Filing date + 5 years
Backup Records	
License Agreements	Permanently
Litigation Case Files	Resolution + 7 years (at discretion of General Counsel)
Membership Files (Rosters, Communications, etc.)	3 years
Merger And Affiliation Agreements	Permanently
Minute Books	Permanently
Mortgages and Leases	Permanently
NLRB/State Recognition and Certification Documents	Permanently
OSHA Injury/Accident Reports (As Employer)	Date of Injury + 5 years
OSHA Logs and Summaries (As Employer)	6 years
OSHA Reports/Records – Monitoring Exposure to Hazardous Materials	Exposure + 30 years
OSHA Reports/Records of Medical Examinations	Termination + 30 years
Payroll Records	7 years
Pension Plan Government Filings	7 years
Property Appraisal Records	Indefinitely
Public Statements, Press Releases, Member Communications, Staffing Analyses, Letters to the Editor, Budget and Pension Analyses Released to the Public	5 years
Tax Returns and IRS 990 Filings	Permanently
Trust Agreements	Permanently
Workers Comp/Unemployment Claims Records (As Employer)	Date claim resolved + 7 years



WHERE SHOULD FILES BE KEPT?

All records and information should be kept in one place – a personal residence is not recommended.

A file cabinet at the union office.

Scanned and kept in secure online database.

A copy of important document can be kept offsite.

Permanently keep only those items required by law or union regulations.

In other words, keep files with administrative, legal and historical value.

However you do it, make it consistent and transferable!



LOCAL CONSTITUTION & BY-LAWS

Section 3. Government Constitution and By-Laws

Each local union, its officers, representatives, and members shall recognize, observe, and be bound by the provisions of this Constitution and By-Laws and interpretations thereof rendered by the General President as provided herein, the resolutions, decisions and directives of the Executive Board or officers of the Association when made in conformity with the authority granted by this Constitution and By-Laws, and the resolutions adopted and policies established by the delegates at conventions.

Local unions shall adopt a constitution or by-laws, supplementary to the Association's Constitution and By-Laws which shall establish procedures for the conduct of the local's internal affairs and business; provided, however, that the local's constitution or by-laws make express reference to the governing authority of all applicable provisions of this Constitution and By-Laws, and particularly those governing local unions as set forth in this Article, and provided, further, that none of the provisions of such local union constitution or by-laws shall be in conflict with any of the provisions of this Constitution and By-Laws, and that following adoption by the local union but prior to printing or issuance all local constitutions or by-laws shall be submitted to the General President for his/her approval.

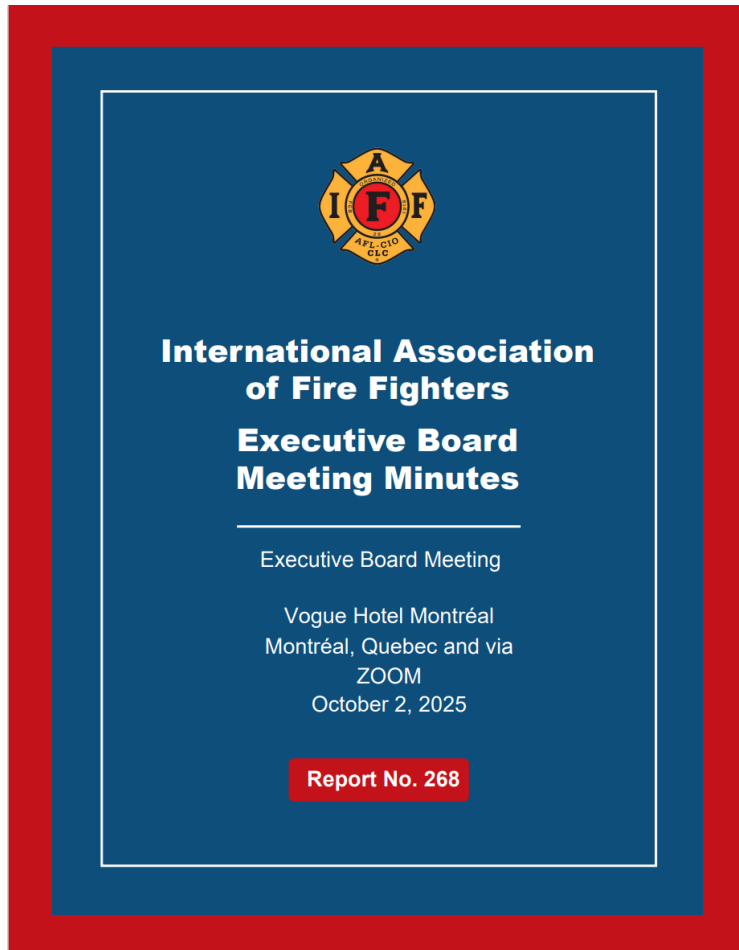
In addition to the foregoing requirements, local unions shall submit to the General Secretary-Treasurer a current copy of their respective constitution and by-laws before February 1, 2011, and every four years thereafter. In all cases, whether for approval of changes or for quadrennial submission, affiliates shall submit the constitution and by-laws in a searchable electronic format acceptable to the IAFF.

IAFF Constitution & By-Laws

Article XIII – LOCAL UNIONS



MINUTES AND MEETINGS



One of the most important functions of the secretary is keeping and maintaining the minutes of local union meetings, board meetings, and special meetings.

Every meeting involving your local should be planned in detail. The Union Meeting Agenda should be developed in collaboration with the Local Union President. Time allocation should be given serious attention when putting together any agenda for all meetings.



WHAT DO MINUTES INCLUDE?

- **Meeting Basics**
 - Time, Date
 - Location
 - Who Presided
 - Number of Members Present (Quorum or Not)
- **Reports of Committees**
 - (entered by reference or attachment)
- **All Motions Made**
 - Submitted in Writing
 - Maker of Motion
 - Secunder of Motion (Local Custom)
- **All Rulings of the Chair**
- **Time of Adjournment**
- **Next Meeting (Date, Time, Location)**



MINUTES VS TRANSCRIPTS

MINUTES

WHAT WAS DONE

A summary account of what was done at a meeting.

Use attachments for committee reports and financial documents

Concise and brief

Example: Member Jones spoke in favor of the motion.

TRANSCRIPTS

WHAT WAS SAID

Word-for-word record of the meeting

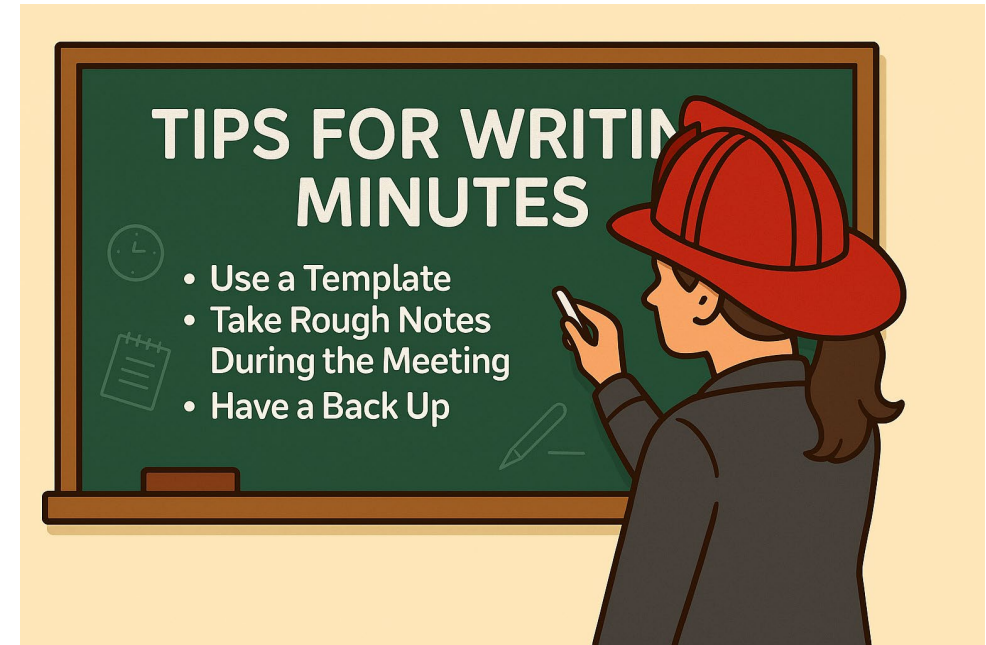
Longer and more in-depth

Example: Member Jones said he believed the motion was needed to keep members safe, but the chief failed to do so. He also said that this was something that was a long-time in the making and that he was glad to see the local taking action. He said his entire station favored passing the motion.



TIPS FOR WRITING MINUTES

- **Use a Template**
- **Take Rough Notes During the Meeting**
- **Have a Back Up**
 - Pen and paper if you use a computer to take minutes
- **Accept Only Motions Made in Writing (consideration)**
 - Read back all motions and have the maker verify
 - Retain the written motion as an attachment
- **Use the Same Verb Tense Throughout the Minutes**
 - Was/Is, said/says, reported/reports
- **Use Clear, Concise, Impartial Language**
- **Edit Carefully Before Finalizing Minutes**
- **Distribute Final Version of Minutes in PDF**

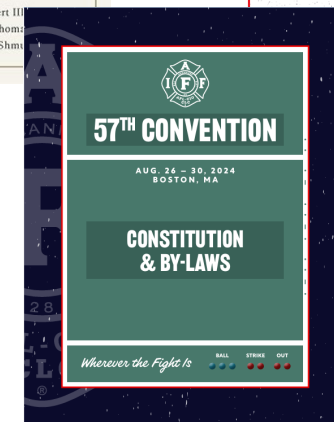
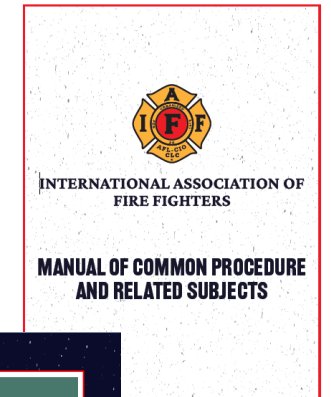
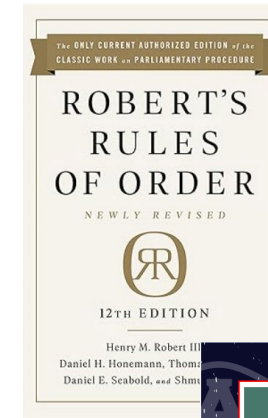


MINUTES PRACTICE



LOCAL MEETINGS – MATERIALS TO HAVE ON HAND

- Local Minutes Book
- Committee Report Book
- Local Union Constitution & By-Laws (*with latest amendments*)
- IAFF Constitution & By-Laws
- Robert's Rules of Order or Atwood's (*IAFF By-laws allows your local either option*)
- Manual of Common Procedures
- Notebook to take rough minutes
- Current Collective Bargaining Agreement (*for those with a collective bargaining agreement*)
- Local's policies and procedures



MEETINGS

- How often?
- Where should they be held?
- What is the best time of day?
- How long should a meeting last?
- Who constructs the agenda, the board or the president?
- What sorts of things get included on the agenda?
- How to encourage attendance at general membership meetings?
- What about virtual attendance?

General Membership Meetings




MEETINGS

- How long?
- Who attends?
- Is virtual attendance advisable?
- Agendas and quorums.
- Specifying the quorum in the constitution.
- Who votes? Do proxy votes count?
- Special meetings.
- Emergency meetings (less notice than special meetings).


Executive Board Meetings



PARLIAMENTARY PROCEDURE




All meetings are democratic. All members have an equal say and vote.



Decisions are made by the majority of members.



Minority rights are protected.



Everyone has the right to free and fair debate.



RULES FOR MEETINGS

Overview of Local Union Meetings

The following rules are to be used to conduct meetings:

ROBERTS or ATWOODS



RULES



DAY-TO-DAY RESPONSIBILITIES

What are some of the day-to-day responsibilities of being in your union officer position?

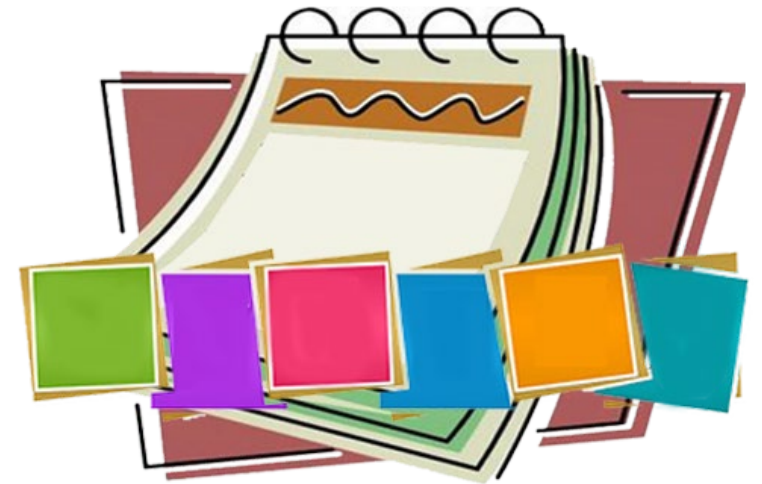
The ability to effectively plan.

Know your local's constitution and by-laws.

Keeping a calendar of events for the year.

Establish a record-keeping system.

Know the important dates – e.g., filing tax documents, negotiations, grievance deadlines, convention.



POLICIES

- Best Practice
- Approved by Local Board
- Adopted by Membership
- Sets Expectations and Rules
- IN WRITING

- GST Office can assist and advise

POLICY NUMBER:

POLICY TITLE:

EFFECTIVE DATE:

PURPOSE: To set rules and guidance for travel expense reimbursement.

1. Scope

- All travel must be pre-approved by the president or treasurer.
- This policy covers travel for union-related activities only.

2. Eligible Personal Travel Expenses

- Lodging (hotel room, tax, and fees only),
- Airfare/train fare (coach or economy only),
- Personal car mileage reimbursed at the IRS/CRA rate
- Rental car, fuel for rental car, parking fees.

3. Per Diem

- When a local member is on union travel with an overnight stay, they shall be eligible for a per diem of \$80 per day, including the first and last days of travel.
- This per diem reimbursement covers all meals, out-of-pocket tips, and incidental expenses not listed above.

4. Reporting Requirements

- Receipts or digital copies for all transactions are absolutely required unless, on rare occasions, a receipt cannot be obtained, in which case, a well-documented note explaining the reason will be provided.
- Receipts must be turned in via an expense voucher or electronic voucher system within 30 days of the transaction with
- The treasurer will reimburse for all eligible expenses within 15 days of submission
- The treasurer will preserve all receipts as required by the IRS/CRA and the Department of Labor
- Receipts will be made available to the Board of Trustees or Audit Committee to perform an annual review in compliance with the IAFF Constitution & By-Laws to complete the Local Union Financial Report.
- Deviations from this policy shall be explained in writing and approved by the Executive Board.



WHO CAN SEE YOUR EMAIL?

- DO NOT USE DEPARTMENT-ISSUED EMAIL
- USE YOUR OWN DOMAIN
- CREATE GMAIL OR OTHER SERVICE

- CONSIDER USING AN EMAIL SEPARATE FROM YOUR PERSONAL ACCOUNT
- ~~SternFamily@gmail.com~~
- Local##.Secretary@gmail.com



RESOURCES AT IAFF.ORG



INTERNATIONAL
ASSOCIATION OF
FIRE FIGHTERS

- ADVOCACY
- HEALTH & SAFETY
- TRAINING
- EVENTS
- NEWSROOM
- MEMBERS



www.iaff.org/secretary-treasurer-resources/



← LEADER RESOURCES

SECRETARY-TREASURER RESOURCES

[CONTACT US](#)

↑ IN THIS SECTION

- TAX AND FINANCIAL RESPONSIBILITIES – U.S. →
- TAX AND FINANCIAL RESPONSIBILITIES – CANADA →
- AFFILIATE BONDING INSURANCE →
- FUND BALANCE TRANSFER REPORT →
- RULES FOR PARLIAMENTARY PROCEDURE →
- DOCUMENTS →
- EXECUTIVE BOARD MINUTES →
- ARCHIVED CONVENTION INFORMATION →

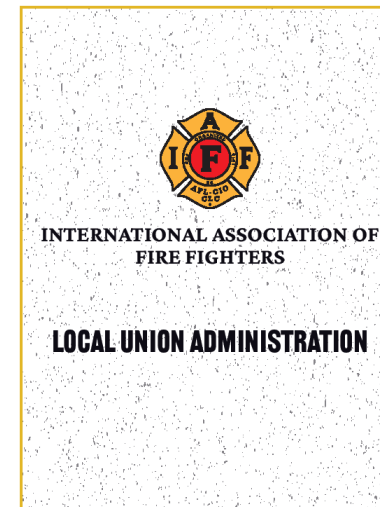
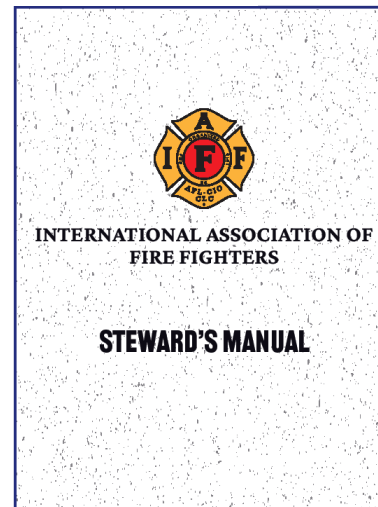
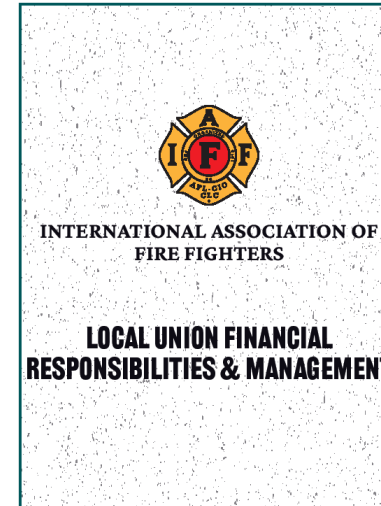
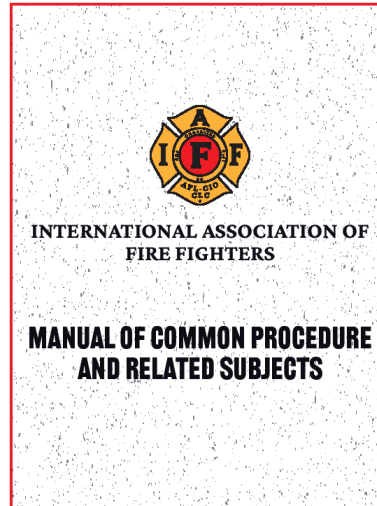


RESOURCES, MANUALS, & IMPORTANT DOCUMENTS

SECRETARY-TREASURER RESOURCES

DOCUMENTS

<p>Local Union Administration</p> <p>This manual addresses organizing union meetings, choosing leadership styles, recruiting union volunteers and other tips for accomplishing your union goals.</p> <p>VIEW →</p>	<p>Local Union Financial Responsibilities</p> <p>This document lists the duties of the local union secretary-treasurer, secretary and treasurer and covers the financial responsibilities of the local. The document also provides guidance on managing day-to-day operations.</p> <p>VIEW →</p>	<p>Manual of Common Procedures</p> <p>This manual provides a detailed description of the responsibilities of the principal officers. The manual is provided so that important functions such as initiating candidates for union membership, installing officers, conducting meetings and the administration of local affiliates will be uniform throughout the IAFF.</p> <p>VIEW →</p>
<p>Local Union Financial Audit Report and Review</p> <p>This yearly report should be prepared and certified by the local union trustees. The report is due within 180 days after the close of the local's fiscal year.</p> <p>VIEW →</p>	<p>Guidance Document FOR LOCAL UNION FINANCIAL AUDIT REPORT</p> <p>To help locals with the Local Union Financial Audit Report, the Office of the GST has created a Guidance Document to provide information that may not fit on the form.</p> <p>VIEW →</p>	<p>Additional Sheet FOR LOCAL UNION FINANCIAL AUDIT REPORT</p> <p>To help locals with the Local Union Financial Audit Report, the Office of the GST has created an Additional Sheet to provide information that may not fit on the form.</p> <p>VIEW →</p>
<p>IAFF Local Charitable Activities Manual for Affiliates</p> <p>This manual is intended to assist IAFF affiliates in complying with US law in their charitable activities. Because Canadian law differs significantly from US law, Canadian affiliates with specific questions about their charitable activities should consult with the IAFF's Canadian Office: (613) 567-8988.</p> <p>VIEW →</p>	<p>Supply Order Form, Canada</p> <p>Lists supplies and order instructions.</p> <p>VIEW →</p>	<p>Supply Order Form, U.S.</p> <p>Lists supplies and order instructions.</p> <p>VIEW →</p>

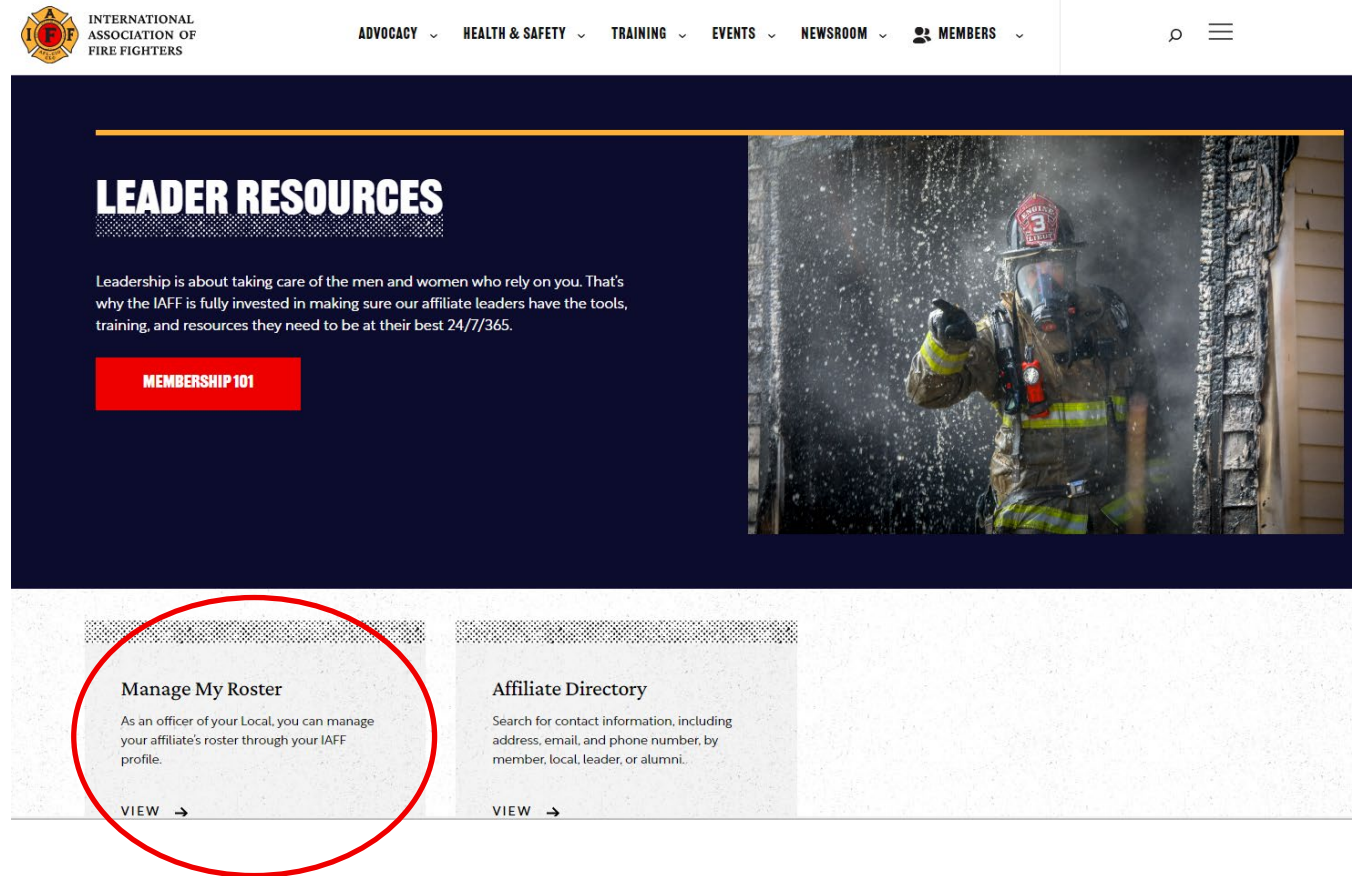


IAFF MEMBERSHIP ROSTER

Updates to the Membership Roster are used for Per Capita Invoicing.

It is also used for member mailings such as Fire Fighter Quarterly.

Also gives members access to iaff.org.



MEMBERSHIP DASHBOARD



Cincinnati

LOCAL ADDRESS
1011 W 8th St
Cincinnati, OH 45203-1205
(513) 241-3541

ACTIVE

908

RETIRED ACTIVE

13

TOTAL MEMBERS

921

NEW MEMBER JOIN

Use this QR Code on your Local's printed materials (posters, flyers, handouts).

New members can also join directly at: <https://iaff.org/NewMemberJoin?LocalID=1102823>

Notifications of completed forms are sent to Local Presidents and Secretaries (or Secretary/Treasurers) on a daily basis. Officers can also review and approve prospective members using the [New Members Approvals](#) form.



LOCAL DEMOGRAPHICS

REGION	REGION 2	FEDERAL EIN	23-7035246
STATE ASSOCIATION MEMBER	Yes	ORIGINAL ID	L0048
JOINT COUNCIL MEMBER	No	ORIGINAL CHARTER DATE	1/5/1917
AMALGAMATED LOCAL	No	CURRENT CHARTER DATE	7/20/1936
EMS ONLY LOCAL	No	BOND AMOUNT	\$120,000.00
EMS ONLY LOCAL TYPE		FISCAL YEAR END	December 31
PART TIMERS INCLUDED	No	LAST AUDIT	12/31/2024
CRA EFFECTIVE DATE	12/10/2023	CBL RECEIVED DATE	11/21/2024
CRA EXPIRATION DATE	12/5/2026	CBL RESPONSE DATE	12/3/2024
		CBL LAST REVIEW DATE	11/1/2023

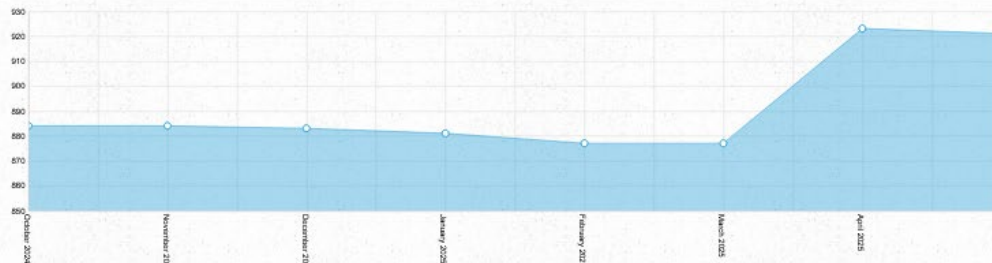
QUICKLINKS

- [Manage Local Roster](#)
- [Add New Members](#)
- [New Member Approvals](#)
- [Per Capita Balance and Statement Archive](#)
- [Per Capita AutoPay](#)
- [Officer Changes](#)
- [Request a Member Card](#)
- [FIREPAC Giving History](#)
- [Departments of Amalgamated Local](#)

LOCAL OFFICERS

Position	Full Name
President	Joseph M. Elliott
Secretary/Treasurer	Timothy J. Kloepfer
Vice President	Melissa Arnold
Vice President	Trent Carter
Officer	Andrew Wickerham

MEMBERSHIP COUNTS



ROSTER UPDATES

New Member Approvals	Membership Changes	Inactive Members	Data Integrity	
Name	Home Address	Email		
There are no records.				

- **Update Members and Officers**
- Makes sure your members are IAFF members
 - Eligible for IAFF programs and benefits
- Generates Per Capita Invoice
- Can only be done by President, Secretary, Secretary-Treasurer
- Use the *My Members* tab



ROSTER UPDATES

LOCAL ROSTER MANAGEMENT TUTORIAL

INTERNATIONAL ASSOCIATION OF FIRE FIGHTERS

Local Roster Management Tutorial

SELECT LANGUAGE | SIGN OUT | FRANK | CART

HOME | AFFILIATE DIRECTORY | MY MEMBERS | EVENTS | DONATE | DUES/SUBSCRIPTIONS | MY PROFILE

MY MEMBERS

The first 50 members are shown at the bottom of this page. Use the arrow or page number buttons to scroll through the roster. You can select an individual to update or export an entire roster from this page.

Helpful tips:

- Enter all or part of the individual's name and click the Find button to search for a specific individual.
- Click on a column header to sort the list by that column.
- Click on an individual's status to change the status.
- Click on an individual's member ID to edit their information.
- To download a roster, click on the Export button and select the format you wish to export to.

Cincinnati

MANAGE MEMBER ROSTER (DOWNLOAD/EDIT)

STATUS EQUALS: Active

LAST NAME STARTS WITH: []

FIRST NAME STARTS WITH: []

FIND

EXPORT

Watch on YouTube



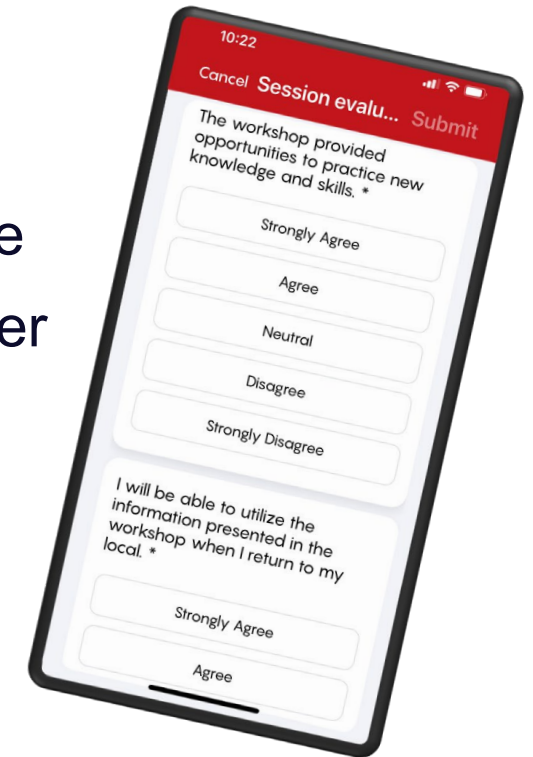


THANK YOU!
ANY QUESTIONS?

gsoffice@iaff.org

EVALUATION AND WIN AN IPAD!

- **Submit your workshop and overall evaluations to be automatically entered in two drawings for a new iPad!**
- **Complete your evaluations using the IAFF app:**
 1. Download the IAFF app and sign in with your iaff.org username
 2. Tap the 2026 Strive for Excellence Summit event image to enter the event's dashboard
 3. Tap "Sessions" and tap on the workshops you attended
 4. Tap "Evaluation" and complete the evaluation
 5. Tap "Submit"



For the event's overall evaluation, follow steps 1 and 2, then tap "Event Evaluation" located in the event's Dashboard.

