



# PROGRESS REPORT

ALPA'S

# STRATEGIC PLAN

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**IN OCTOBER 2008,** this union brought together, as it does every 2 years, men and women of purpose and vision—our Board of Directors, made up of this union's national officers and the line pilots who serve as elected representatives on their local executive councils (LECs) and master executive councils (MECs).  At the BOD meeting 2 years ago, the pilot reps put their collective wisdom and judgment together to craft a strategic plan for our union. Now, as we prepare for the next BOD meeting to be held this month, it's an appropriate time for a position report on how far we've moved toward achieving our goals. 

# DELEGATE COMMITTEE 1



## ALPA STRUCTURE

Received briefings describing the union's structure, its evolution, and alternatives that exist within ALPA's governing framework to tailor master executive council structures to the needs of individual pilot groups.



**INITIATIVE 1:** Code-share family information sharing and principles of career protection and progression

-  ALPA established Joint Standing Committees (JSC), including the Delta Connection Pilots Alliance (DCPA)
-  ALPA facilitated family pilot alliance group meetings to discuss upcoming and/or current negotiations, safety and security issues on the properties, and other pertinent issues (United, Delta, US Airways, and their feeder airlines, etc.)



**INITIATIVE 2:** Information sharing and coordination across pilot group lines

-  ALPA coordinated collective bargaining across Piedmont, PSA, and Air Wisconsin pilot groups
-  The Collective Bargaining Committee members made information readily available to constituent bodies and negotiating committees

**INITIATIVE 3:** All ALPA MECs shall establish and maintain strategic plans

-  Various ALPA departments coordinated with the Fee-for-Departure Task Force and the Strategic Planning Committee, helping 15 out of 38 pilot groups craft strategic plans
-  In May, the Executive Board passed new policy to require strategic plans for MECs seeking MCF authorization and budget approval

**INITIATIVE 4:** Maximize participation in LEC elections and improve the balloting system



-  ALPA's Information Technology Department now provides options for virtual meetings through SharePoint
-  ALPA's Membership and Information Technology Departments worked with our balloting vendor to develop a process allowing voter access through the members-only site of [www.alpa.org](http://www.alpa.org), eliminating the need for each member to establish unique voter credentials. This resulted in an increase in voter participation in all types of ballots and a reduction in calls from members frustrated by access issues

# DELEGATE COMMITTEE 2



## COLLECTIVE BARGAINING & R&I

Received background information that included Collective Bargaining Committee and National Retirement and Insurance Committee reports, descriptions of cornerstone contract and benefit provisions, and historical data related to pay rates and benefits, among other material.



**INITIATIVE 1:** Bargaining favorable contracts and mutual support

-  ALPA pilots improved cornerstone contract provisions at Delta, Alaska, Hawaiian, Spirit, and Jazz
-  Since the formulation of ALPA's 2009 strategic plan, significant improvements have been negotiated in retirement and insurance contract provisions at numerous airlines, including Delta, Alaska, Hawaiian, Spirit, and Jazz



**INITIATIVE 2:** Integration and coordination of benefits and pay

-  ALPA aligned the Retirement and Insurance Department under the Representation Department to enhance coordination and mainstream R&I issues during collective bargaining
-  ALPA increased coordination and participation between the Collective Bargaining Committee and the National Retirement and Insurance Committee

**INITIATIVE 3:** Strategic contract enforcement

-  ALPA incorporated alternative methods of contract enforcement into MECs' strategic planning and the Representation Department's annual Grievance Training Seminar
-  ALPA developed and refined an online Dispute Tracking and Grievance System and built data resources (e.g., brief bank, enhanced arbitrator resumes, etc.) for staff and pilot representatives to access, increasing grievance and caseload efficiency and promoting best practices ►►►

**INITIATIVE 4:** Maximize participation in LEC elections and improve the balloting system





-  The Collective Bargaining Committee presented a report at the Executive Board meeting that includes charted target zones for pay and outlines other favorable patterns, model language, and "best practices" guidance for pilot groups
-  The Retirement and Insurance Department will update its R&I Benchmarking Study at the 2010 Board of Directors meeting in October, using a rating system that grades retirement, active/retiree health care, long-term disability, and survivor benefits across ALPA pilot groups

# DELEGATE COMMITTEE 3




## SAFETY & SECURITY

Engaged in strategic planning discussions regarding ALPA's safety and security priorities to help shape the direction of your union. Despite the abundance of issues that could easily be placed high on any airline pilot priority list, out of necessity, delegates whittled down the list of safety and security to the following key issues.



**INITIATIVE 1:** Pilot fatigue and flight time/duty time

-  Lobbied for legislation, signed into law by President Obama in August 2010, which sets a one-year timetable for the FAA to complete the flight-time/duty-time (FT/DT) rulemaking process and to implement new FT/DT federal aviation regulations
-  ALPA co-chairs the Fatigue Management Working Group of the FT/DT Canadian Aviation Regulation Advisory Council Technical Committee, which met in June and August 2010
-  ALPA co-chaired the FAA's FT/DT Aviation Rulemaking Committee, which made a series of recommendations in September 2009
-  ALPA developed a new ALPA FT/DT policy, which the Executive Board passed in October 2009



**INITIATIVE 2:** ASAP/FOQA

-  All but two ALPA pilot groups have ASAP programs, and more than half have acceptable FOQA programs
-  Continued to work with airlines and regulators to ensure that programs are functional and do not simply exist on paper
-  Lobbied for legislation, signed into law by President Obama in August 2010, that instructs the FAA to encourage—not mandate—airlines to develop ASAP and FOQA programs that work, protecting the essential voluntary participation




**INITIATIVE 3:** Unmanned aerial systems

-  ALPA participated on advisory committees, responsible for developing "certification" and/or approval standards for UAS operators, aircraft, and the pilots who will operate these aircraft
-  Supported legislative language ensuring the safety of UAS and other NAS users before the government considers unrestricted UAS access to the national airspace system


**INITIATIVE 4:** NextGen participation

-  ALPA participated in multiple advisory committees and industry work groups responsible for developing airborne and surface air traffic control (ATC) procedures and plans for airspace changes to support modernization of the U.S. ATC system
-  ALPA lobbied for guaranteed continued robust funding in the FAA reauthorization legislation to ensure the long-range viability of NextGen implementation plans

**INITIATIVE 5:** CrewPASS

-  The Transportation Security Administration (TSA) tested and approved CrewPASS for implementation in June 2009; it is operating at BWI, PIT and CAE through an agreement between a CrewPASS vendor and TSA
-  CrewPASS is an airline-funded security program; in mid-2009, only one vendor was marketing the system to the airlines after TSA approval. ALPA hosted a series of CrewPASS consortiums to generate more competition and bring costs down, which led to the successful recruitment of new vendors. Today, several airlines are actively meeting with these vendors as a direct result of our efforts
-  In May 2010, ALPA distributed a proposal for nationwide CrewPASS deployment to each of the union's U.S. pilot groups and their airlines

**INITIATIVE 6:** Secondary barriers

-  ALPA actively participates in an RTCA Special Committee responsible for drafting the minimum performance standards for cockpit secondary barriers, due out in June 2011

- ✓ ALPA addressed the need for secondary barriers with the Department of Homeland Security (DHS) and the TSA in mid-2010 and also briefed congressional staff on numerous occasions

#### **INITIATIVE 7:** Federal Flight Deck Officer (FFDO) program

- ✓ H.R. 2200, passed by the U.S. House of Representatives, includes language that increases the number of facilities that FFDOs can use for recurrent training. The bill also includes provisions for reimbursing certain FFDO expenses incurred during recurrent and requalification
- ✓ FFDOs were authorized to carry internationally into one country on mission-status basis
- ✓ ALPA continues to lobby for more funds for the FFDO program budget
- ✓ ALPA addressed the need for FFDO improvements with the DHS secretary and the TSA administrator in mid-2010 and also briefed congressional staff on numerous occasions

#### **INITIATIVE 8:** All-cargo security

- ✓ ALPA pressed for improvements in the areas of fortified flightdeck doors, fingerprint-based criminal history records checks for all individuals with unescorted access to cargo, providing all-cargo operations full secure identification display area protections, and mandating training on all-cargo Common Strategy
- ✓ The National Security Committee added a new director of cargo position to the Committee structure
- ✓ ALPA addressed the need for all-cargo security improvements with the DHS secretary and the TSA administrator in mid-2010 and also briefed congressional staff on numerous occasions

## DELEGATE COMMITTEE 4

### ALPA RESOURCES

Conducted a comprehensive review of ALPA's resources from a structural, financial, and staff complement standpoint. The focus of the discussion included industry key indicators, ALPA membership and dues income, ALPA reengineering initiatives, and several union accounts (A&S, SMRA, OCF, MCF), among other topics.

#### **INITIATIVE 1:** Financial review and reengineering process

- ✓ Reengineering initiatives since the financial crises in 2008—including changes to budgets, expenditures, and resource allocation based on the Association's core services and strategic priorities—have been successful in preserving the financial viability of the Association
- ✓ ALPA expanded the use of Contingency Fund Oversight Boards to assist MECs in developing more efficient budgets, reducing the demands on ALPA's Operating Contingency Fund in conjunction with no longer using the MCF as a financial backstop for the OCF
- ✓ Recommendations by ALPA's MCF Review Committee led to the May 2010 Executive Board adopting new financial policies regarding the MCF, including defining the proper use of the MCF, the requirement that MCF budgets, accompanied by MEC strategic and communications plans, be approved by the Executive Council, and clarity regarding allocation amounts by size of pilot group and when funds can begin to be spent
- ✓ Capt. Randy Helling, vice-president-finance/treasurer, increased his communications with MECs in deficit spending, prompting MECs to take corrective actions
- ✓ The Executive Council directed Capt. John Prater, ALPA's president, to establish the Special Committee for Finance, Structure and Services Committee

#### **INITIATIVE 2:** Securing flight pay loss in CBAs

- ✓ ALPA developed an internal online flight pay loss (FPL) preapproval application to ensure appropriate review and approval of FPL for ALPA work. Initially implemented for National Committee FPL, ALPA later rolled out the program for MECs to use
- ✓ The flight pay loss credits that the Delta MEC and Northwest MEC received for the merger totaled more than \$8.5 million
- ✓ Letter of agreement with Continental and United to cover ALPA costs associated with the merger of the two airlines

#### **INITIATIVE 3:** Conducting meeting planning analysis

- ✓ In 2008, the Executive Air Safety, Cargo, Jumpseat, National Security, and Pilot Assistance Committees consolidated annual meetings and forums into a single Air Safety Forum, saving ALPA more than \$100,000 ▶▶▶

# DELEGATE COMMITTEE 5

## EDUCATION & COMMUNICATION

Examined how ALPA can increase the effectiveness of its communications both internally and externally to reconnect our pilots to their union, helping them understand what their union does for them on an every day basis, and that together, WE ARE ALPA.

### INITIATIVE 1: ALPA Pilot Spokesperson Program

- ✓ ALPA fostered ongoing relations with the news media and concentrated our communications resources where they can generate the best results, an approach that paid off tremendously during the Colgan Flight 3407 accident investigation. Three ALPA pilot spokespersons conducted more than 40 interviews with ABC World News Tonight, CBS Evening News, NBC Nightly News, CNN, *The Wall Street Journal*, *The New York Times*, and other major news media outlets

### INITIATIVE 2: Web updates

- ✓ ALPA upgraded its website to provide more information and greater accessibility for users; pilots can read *Air Line Pilot*, view videos of announcements and special events, and retrieve a wide range of other resources
- ✓ ALPA created a new login procedure that allows members to pick their own user ID and password, making access to information on the union's website easier and more user-friendly
- ✓ ALPA updated the members-only website, including a resource tab called ALPA Toolbox, which houses pertinent information about each ALPA department and individual national committee
- ✓ ALPA developed a Canada Board website for our Canadian members, featuring the latest news from Parliament and timely updates tailored specifically for ALPA's Canadian pilot groups

### INITIATIVE 3: Implementing modern media at ALPA

- ✓ The Association broadened its arsenal of communications tools, ensuring that members enjoy a variety of ways to stay in touch with their union; now you can
  - become a fan of WeAreALPA on Facebook to receive regular and timely updates
  - see photos from the latest ALPA events on Flickr, an online service that enables users to store, sort, search, and share photos
  - subscribe to ALPA's Top Story, Advocacy, Pilot Groups, Safety, and Events RSS feeds to easily retrieve timely news, highlights, and other information from your laptop, BlackBerry, or iPhone via an RSS reader such as Bloglines, My Yahoo, or Google
  - follow WeAreALPA on Twitter, a micro-blogging service that features brief, 140-character "tweets," which you can also send to your mobile phone
  - watch select ALPA videos on YouTube, which allows you to view ALPA videos from your mobile phone, too
  - connect with your fellow pilots and professional staff on ALPA's LinkedIn account, where you can network and collaborate with qualified aviation industry professionals

### INITIATIVE 4: [www.WeAreALPA.org](http://www.WeAreALPA.org) for internal and external organizing

- ✓ As part of ALPA's ongoing goal to represent all airline pilots in Canada and the U.S., the Association launched an online organizing tool—[wearealpa.org](http://wearealpa.org)—where pilots can learn about the union's team approach to collective bargaining, its legislative and regulatory efforts, its role as airline safety and security advocate, and its connection with pilot unions in other countries through its affiliation with the International Federation of Air Line Pilots' Associations

### INITIATIVE 5: Develop university-level ALPA course curriculum

- ✓ The Education Committee established strong ties with accredited aviation academic institutions over the last 2 years, building a program called the ALPA ACE Club in collaboration with ALPA's Legal Department and schools such as Embry-Riddle by crafting a draft memorandum of understanding; currently with the Executive Council for review, the MOU would serve as a template to foster stronger relationships between ALPA and the next generation of airline pilots across the U.S. and in Canada
- ✓ ALPA redesigned the Cleared to Dream website, which spreads information to students and university educators on how to become an airline pilot and the role our union plays in the advancement of the airline piloting profession



# DELEGATE COMMITTEE 6

## LEGAL, GRIEVANCE, & MERGERS

Focused its discussions on issues relating to career security, mergers, and merger policy. Delegates considered current developments in the merger arena, efforts now under way to review and revise ALPA merger and fragmentation policy, and proposals related to enhancing career security.

### INITIATIVE 1: Merger Policy Review Committee update



The Executive Board approved a new ALPA merger policy in May 2009 that provides an effective mechanism for supporting the interests of ALPA pilot groups facing mergers

### INITIATIVE 2: Career Security Protocol Committee update



The CSPC issued its final report, which detailed the pros and cons of a national seniority list, to the Executive Board in May 2010. The Board unanimously accepted it.

# DELEGATE COMMITTEE 7

## LEGISLATIVE & REGULATORY

Reviewed ALPA's current legislative and regulatory initiatives for the U.S. and Canada, including a discussion of comprehensive energy and transportation policies, ALPA's involvement on Capitol Hill, its political action program (ALPA-PAC), and ALPA's position on foreign ownership and control.

### INITIATIVE 1: Comprehensive energy and transportation policy



ALPA, in collaboration with the AFL-CIO and Stop Oil Speculation Now, successfully lobbied for legislative language in the Wall Street Reform and Protection Act to protect our jobs from the unstable commodity markets that resulted in inflated jet fuel prices for our airlines; the new law, signed by President Obama in July 2010, includes two significant ALPA-supported provisions: 1) increases transparency and oversight of commodities trading; and 2) includes protections for the airline industry, which utilizes legitimate hedging practices to control costs

### INITIATIVE 2: Bankruptcy and pension reform



ALPA lobbied for bankruptcy reform legislation, introduced in the House (H.R. 4677) and Senate (S. 3033), and Capt. Prater testified in support of it this May, saying it restores balance to the bankruptcy process and provides incentives for managements to bargain in good faith

### INITIATIVE 3: Increase participation in ALPA-PAC and Call to Action campaigns



ALPA launched the 2010 PAC Annual Giving Campaign, featuring incentives for pilot participation that include a distribution of new PAC rewards for high-level donors; sending e-solicitations in conjunction with Call to Action alerts, which raised more than \$20,000 in a matter of days while significantly reducing operating costs; offering a new fully operational credit card option for PAC donations; implementing political check-off programs at three additional pilot groups (AirTran, Capital Cargo, and Compass); and urging 100 percent PAC participation for ALPA leaders in advance of the BOD meeting



ALPA members participated in Call to Action campaigns in record numbers this year, with more than 8,000 pilot responses to oppose cockpit voice recorder monitoring legislation; nearly 2,000 pilot responses to support joint ventures/jobs outsourcing legislation; a recently launched grassroots program on FAA reauthorization legislation; and supporting legislation to curb oil speculation through the Stop Oil Speculation Now coalition website

### INITIATIVE 4: Foreign ownership and control



ALPA played a commanding role in the U.S.-EU multilateral negotiations, thwarting European efforts to relax restrictions on cabotage, domestic wet-lease, foreign ownership, or foreign control; in fact, for the first time in an air services agreement, the protocol contains an article specifically designed to protect labor interests



ALPA represented pilot interests in a similar manner in the Canada-EU negotiations last year, again helping to ensure that no statutory changes were made to the Canadian ownership and control and cabotage laws as part of the resulting air services agreement ►►►

# DELEGATE COMMITTEE 8

## MEMBERSHIP & ORGANIZING

Reviewed ALPA's organizing efforts and membership initiatives. Members of the Committee engaged in spirited debate on ALPA's past and present internal and external organizing activities, including the structure, process, and financing of organizing in the U.S. and Canada.

### INITIATIVE 1: Redefining committee structure under a "professional development" umbrella

✓ ALPA combined the efforts of the Education, Leadership, and Membership Committees by establishing the Professional Development Group (PDG), which supports ALPA members throughout their careers—from students to retirees and every membership stage in between—with coordinated messages and materials tailored to each audience

■ The Veteran's Affairs Committee and Furlough Committee, which fall under the PDG umbrella, also reached out to ALPA members with specific needs and requests for information through quarterly newsletters and committee websites

### INITIATIVE 2: ALPA 101 program

✓ The Membership Committee is currently developing curriculum for members at various stages of their career, starting with a presentation that would keep new hires engaged at the 3-6-9-12-month mark between ground school and paying member dues, designed to educate them on ALPA's services and resources and complement the Welcome Aboard packet

### INITIATIVE 3: Encourage message consistency

✓ ALPA revitalized the national Pilot-to-Pilot® publication to further disseminate news from the union to all MECs, created a Communications Department e-newsletter called "On the Radar" to circulate upcoming events and information for input into local council or MEC newsletters, and kept members apprised of MEC unity events and information about support for negotiations and strikes through a Strategic Preparedness and Strike Committee newsflash, which went to MECs and all 53,000 union members

### INITIATIVE 4: Leadership information/training

✓ ALPA revamped the Leadership Training Conference to specifically address the current needs of our new leaders, tailoring the agenda to reflect ALPA's strategic plan and its initiatives

✓ ALPA also held several training sessions outside of the regular election cycle to address new leaders' need for union resources and support in a timely manner

### INITIATIVE 5: Review ALPA's organizing campaigns and strategies

✓ ALPA's Organizing Task Force refined the union's disciplined approach to organizing by adhering closely to strategic objectives established during the 2008 Board of Directors meeting; following this new approach, ALPA enjoyed organizing success at Colgan, Air Transport International, North American Airlines, and AirTran, bringing ALPA closer to its long-term goal of representing all airline pilots in North America



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