

Presidents Planning Calendar

A Year in the Life of a Local President



Building Full Capacity Locals

Dear Local President,

A full capacity local association is one that is vibrant, relevant, strong and dedicated to member service. Building such an association starts with a knowledgeable, confident local president who has a good understanding of what the job of local president entails.

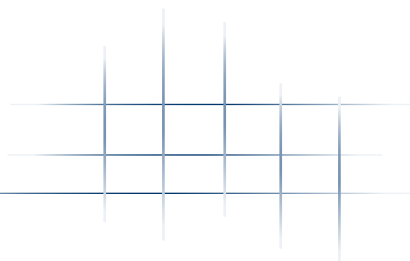
The President's Planning Calendar is designed to help you, as a local president, plan for and carry out your responsibilities as the elected leader of your local association. It contains timely information, helpful suggestions and advice, resources and a month-by-month listing of the major events/activities of which you should be aware.

This booklet and a host of other materials and resources are available to you at no charge as part of MEA's Building Full Capacity Locals (BFCL) initiative. The goal of BFCL is to provide you with the training, information and resources you need to strengthen your local and get more of your members involved.

For more information, materials and/or additional copies of this booklet, contact Teri Battaglieri at tbattaglieri@mea.org or 800-292-1934 or visit **[www.mea.org/Leaders/Building Full Capacity Locals](http://www.mea.org/Leaders/Building%20Full%20Capacity%20Locals)**.

Network with local presidents in your region. These are individuals on whom you can rely for solid feedback. Share ideas both ways and attend all BFCL trainings available as they are lifesavers!

–Roberta Masters, Troy



Getting the Year Started...

Get organized...

To help you plan for the year, request a copy of the annual MEA calendar. Calendars are mailed to UniServ offices each August. There are small pocket-sized calendars to distribute to your members as well as a limited number of larger spiral-bound calendars designed for local presidents and other leaders. Spend a little time going through your calendar – it contains a wealth of information including key phone numbers/e-mail addresses, dates for MEA conferences, trainings and other major events as well as information about MESSA, Michigan Public School Employees Retirement System (MPERS), MEA Financial Services, etc.

Once you get your calendar, you should write in the dates for the following:

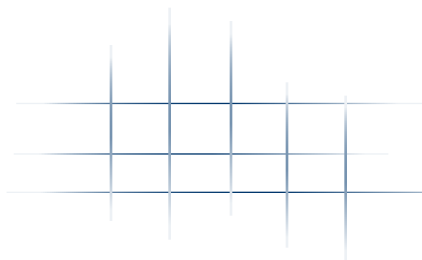
- Meetings of your district/college's school board or board of trustees (check the district/college Web site for these dates)
- Coordinating council meetings (check with your UniServ office for these dates)
- Region meetings (check with your UniServ office for these dates)
- Your local general membership and executive board meetings
- Local and state elections
- Local/zone lobby days

Get connected...

Much of the information distributed by MEA is done via e-mail, and as a local president, you are eligible for a free MEA e-mail account.

To set up your e-mail account, all you need to do is go to **www.mymea.org** and follow the directions on the home page.

Once you're registered, you will start to receive updates and information on current issues, trainings, events and other opportunities available to you and your members.



*Anyone who tells you that being a president just means
a couple of extra meetings to attend is a flat out liar!*

–Brad Walker, Lapeer

July and August

- Attend MEA's Summer Leadership Conference. Local presidents can attend this conference at (almost) no cost! Check out www.mea.org/Conferences for information on this.
- Take a look at all of your local association's committees. Make sure you have a chairperson for each of them and recruit members for any unfilled positions.
- With your leadership team and UniServ director, discuss and update/develop a long-range plan and goals for your local association for the upcoming school year.
Request a copy of the BFCL Local Self-Assessment and Getting Strategic booklets to help with this.
- Schedule and start planning for a New Member Reception/Welcome in September.
- Meet with your local political action committee (PAC) chairperson to set direction for your local association's PAC drive and to determine ways in which to get members more politically involved.
Request a copy of the BFCL PAC Attack booklet to help with planning.
- Meet with your Public Relations/Communications chairperson to set direction for your local association's internal and external communications. Discuss member newsletter focus, dates of publication, other member communications, etc.
Request a copy of the BFCL Communications 101 booklet and CD to help with planning.
- Request (from the district/college HR dept.) the names, contact information and assigned positions of any new members as well as a list of members who have left employment.
- Plan a personal contact with each new member. Provide new members with an overview of the association, inform them of the date for the new member reception, provide information if you are still bargaining. If your district/college has a special meeting/orientation for new employees, you – as the association president – should attend. Try to get on the agenda to speak at this meeting.
- Update all member lists including members by building, member voting lists, list of members who contributed to PAC in the previous year (request this from your UniServ office).
- Get membership forms, MEA calendars and PAC materials from your UniServ director to distribute to your members.

July and August

- With your local association's leadership team, establish dates for your executive board and general membership meetings. Make sure you are in compliance with your local constitution and bylaws. Try to avoid conflicts with MEA conferences. Publish these dates early in the year.
- Set up a rotating calendar so that your executive board members and other members can volunteer to cover each school board meeting held during the year.
- Inform the MEA Membership department of new officers and RA delegates.
- Update and review your association's local financial policies and internal controls as necessary.
- Establish a regular time to talk with your UniServ director. You may also want to consider establishing a regular time to talk with the other union presidents in your district.
- Check out **www.mea.org/Leaders** to see what's new for local leaders.
- With the help of your UniServ director, plan training for your association representatives/stewards.
Request copies of the BFCL Association Representatives/Stewards and Handling Member Grips and Grievances booklets for your training.
- Ask the treasurer to provide a monthly financial update.

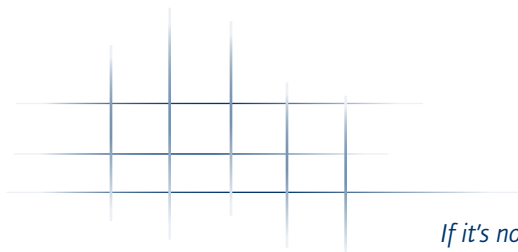
You may be the leader, but you are still part of a larger group. Never think you are above the union jobs that your members do such as stuffing envelopes, collecting for PAC, making phone calls, dropping literature, etc.

—Michael LaBuhn, Local 1

September

- Hold a new member reception/get-together.
- Distribute membership materials such as MEA calendars, MESSA information as well as contact information for your association's leadership team and UniServ director.
- Publish a list of your local association's executive committee chairs and general membership meeting dates along with the meeting dates of the school board/board of trustees.
- Remind your local treasurer to submit applicable IRS forms. Anytime you are unsure of something concerning IRS requirements for your local association, contact the MEA secretary-treasurer.
- Check with the bank/credit union to ensure that updated signature cards are on file and that old ones are destroyed. Work with the treasurer to check MEA membership/billing statement against your district's payroll deduction record.
- Appoint a local audit/internal review committee to work with the treasurer.
- Remind the treasurer to have checkbook, ledger, bank statements and expense vouchers with backup documentation ready for the audit.
- Check the fall issue of the MEA Voice magazine for state and region delegate and board positions to be voted on in the March MEA elections. Are you or any of your members interested in running for a position? If so, it's time to start planning; the deadline for nominations is Dec. 31. Contact your region's president or elections chairperson for more information.
- Hold association representative/steward training.
Request copies of the BFCL Association Representatives/Stewards and Processing Member Grips and Grievances booklets for your training.
- Watch for your *Just Between Presidents* newsletter that is mailed out quarterly.

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If it's not in writing, then it didn't happen.

—Ted Peters, Southfield

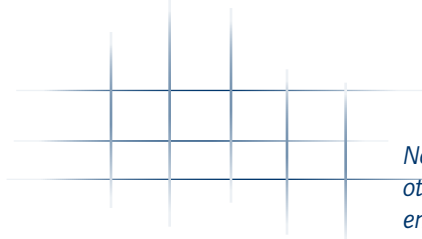
- If you are an EA president, make contact with the student/intern teachers in your district. Give them information about your local association and about Student MEA (SMEA) and what the association can do for them.
- Start talking about your local association's upcoming PAC drive. Outline the goals, offer encouragement, information, etc. Announce the dates of the drive. October is a great month for a PAC drive!
Request a copy of the BFCL PAC Attack booklet to help plan a great PAC drive.
- Make plans to attend your region meeting.
- Make contact (and keep in touch throughout the year) with school board/board of trustee members.
- Attend your Coordinating Council meeting. Find out about training monies available and establish contact with the other presidents who are in your council.

Don't try to do everything yourself; learn how to delegate.

—Mike Bliss, Oak Park

- Hold your local PAC drive
- Encourage members to attend the MEA Instruction and Professional Development (IPD) Conference, which is usually scheduled for the first weekend in December. This is a great conference for newer members who need to pick up CEUs and professional development hours. Go to **www.mea.org/Conferences** for IPD registration information.
- Have audit/internal review conducted by the committee you appointed last month, and review the audit with your leadership team.
- Watch for fee payer information (Hudson packet) from MEA. Make a personal contact with each fee payer or assign someone from your leadership team to do this.
- Keep your members informed about pending education-related legislation and provide information about upcoming November elections. Encourage all members to vote.
- Prepare your local MEA RA delegates (or have a conversation with your local's cluster delegate) for the Fall RA and have them update your executive board on the issues that will be discussed at the RA. Attending region meetings is a good way to learn about the issues.
- To receive the most up-to-date, accurate information on the political scene and what is going on in the Legislature, you and your members should subscribe to MEA's political e-mail newsletters – *Capital Chaos* and *MEA Votes*. These newsletters contain the latest political, legislative and election information; they serve to alert members when specific action is necessary.
 - To subscribe to *MEA Votes*, e-mail webmaster@meavotes.org and submit your home e-mail address.
 - To subscribe to *Capital Chaos*, e-mail Imyers@mea.org with your home e-mail address.
- Alert your PAC committee to start recruiting candidates for upcoming vacancies for school board/board of trustees.

Request a copy of MEA's *Electing Your Employer* booklet to learn more.



No one can or should do it alone. Asking for help and bringing others along is a sign of strength, a sign that you are secure enough to reach out when needed.

—Debbie Lotan, Waterford

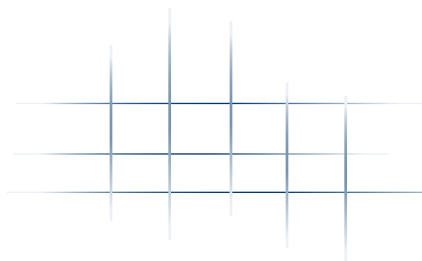
- Attend the MEA Fall RA as an elected delegate (if you are one) or as an observer. You and/or your delegates should report back to your members about what took place.
- For more information on this event, check out **www.mea.org**.
- Celebrate last month's successful PAC drive! Remember to send thank you notes to members who contributed and recognize the PAC committee, the association reps/stewards, and others for the work they did at their buildings/work sites for PAC.
- Remind your treasurer to gather information for submission of IRS Forms 1099 and 990 and to watch for the arrival of Hudson packets for fee payers.
- Make personal contact with new members to see how things are going and to get feedback. It's a great time to encourage them to volunteer for committees.
- Remind members to register for the IPD Conference, if they haven't already done so.
- If you are interested in saving time and money by having your local association's election online next spring, contact the MEA vice president for information. MEA will provide everything you need for an online election at no charge. You need to make arrangements for this at least 60 days in advance of the local election.
- If you are interested in running for a position in your region contact your region's election chairperson. Nominations close with the region meeting in December.

Knowledge is truly power! Look for opportunities to build your members' knowledge base. When you share information, everyone becomes more united and collaborative.

—Cathy Perini Korreck, Rochester

December

- Celebrate the holiday season by doing something special for your executive board, committee chairs and association reps/stewards.
- Attend the MEA IPD Conference.
- Appoint a budget committee to begin work on next year's local association budget.
- Work with treasurer to make sure all fee payers process their Hudson packets by the deadline.
- Register to attend the MEA Bargaining/Political Action/Public Relations conference, which is usually held in early February. Check out www.mea.org/Conferences for registration information.
- Consider nominating one of your outstanding members or someone in your community who has had an impact on education for a special award. Go to www.mea.org/Awards to learn about the awards and nomination process. All submissions must be received by February. Awards are presented at the Spring RA.



Never miss an opportunity to network with other presidents. The opportunity to gain information from others experiencing the same issues is worth its weight in gold.

– Terri McDermott, Traverse City

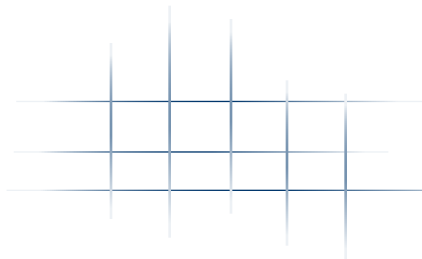
- Mail NEA RA delegate information to MEA headquarters.
- Find out about any staffing/member changes that occurred at the end of the semester.
- Make personal contact with new members.
- Touch base with members hired earlier in the year to see how they are doing and how you can help them. This is a great month to have a gathering for new(er) members because they've had a chance to get some experience and may have lots of questions or concerns at this point in the year.
- Register to attend the MEA Bargaining/PA/PR Conference, if you haven't done so already.
- Remind the treasurer to provide IRS Form 1099 to members and the appropriate IRS Form 990 to the IRS by the deadline.
- Beat the winter blahs! Hold a member TGIF get-together after work at a local watering hole. The union can pick up the cost of the snacks and members can pay for their own beverages.
- Register to attend the MEA ESP Statewide Conference held in March. For more information, go to **www.mea.org/Conferences**.
- Find out when your region's MEA budget hearing is and make plans to attend. Contact your region president or the MEA Executive Office for this information.

Build relationships—with your members, the administration, the superintendent and your school board. That's how you get things done, and it's the best way to head off potential problems/issues.

—Lou Price, Mattawan

February

- Attend the MEA Bargaining/PA/PR Conference.
- Check with your UniServ director and begin preparations for bargaining – schedule building meetings with members, prepare bargaining surveys, select a crisis chairperson to lead the crisis committee, etc.
- Request a copy of the BFCL Crisis Planning booklet to help you.
- Get information from your UniServ director about your zone's local lobby day plans.
- Begin the screening and recommending process for the school board election. Contact your UniServ director for more information on this.
- Time to start finding members to fill local association positions for next year. Check your constitution and bylaws for information on holding local elections. Publish a list of positions and responsibilities for each position. Ask your association reps/stewards to help find members to volunteer. Encourage members to run for office by making personal contact with them.
- Attend your region meeting to pick up MEA election materials and online voting information. Elections are in March. Contact your region president or elections chairperson for more information.
- If you're interested in holding your local election online, contact the MEA vice president.
- Check your constitution/bylaws for rules and timelines for holding local elections. Be sure to follow them!
- Have the treasurer convene a budget committee to start work on next year's local budget. Seek member input through a survey or meetings to get feedback on the budget.



Remember, there are two sides to every story and that members aren't always forthcoming with all of the important details.

—Millie Lambert, Kalamazoo

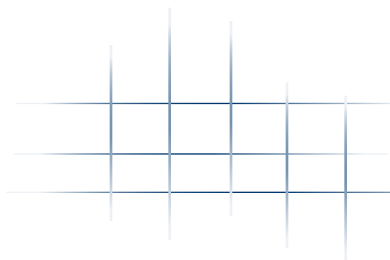
- Continue with bargaining preparation.
- Attend the MEA ESP Conference.
- Establish a committee to review and recommend changes to local constitution and bylaws if necessary. Many locals designate the vice president to chair this committee. Be sure to follow all timelines, etc. as outlined in your local governance documents.
- This might be a very good time to have your documents reviewed by MEA's Governance Review Committee. Contact the MEA Executive Office for information on this.
- Hold MEA elections.
- Be on the lookout for the 60-day MEA RA mailing. All delegates will receive this packet of information 60 days in advance of the MEA Spring RA.
- Prepare your local MEA RA delegates (or have a conversation with your cluster delegate) for the Spring RA. Discuss the proposed MEA budget and other new business items. Be sure to update your executive board on what will be discussed at the RA. Attending region meetings is a good way to find out what the issues will be.
- Begin planning for the recognition of retiring members.
- Remind the treasurer of the need for a draft of next year's budget to present to the executive board in April.
- Present school board screening and recommending results to your executive board for discussion/action. Present strategy for school board election to members – assign roles/responsibilities, etc. Get list of all MEA members who live in your district from your UniServ office and start contacting them. Work with the other unions in your district to get the word out about your recommended candidates.

Request a copy of Electing Your Employer to help you with this.

Learn where the REAL power is. You can't discover this by asking – you have to watch who gets things done, who keeps their word, who can stir up the troops or calm the waters. Then, recruit that person to your executive board.

–Maureen Martin, Birmingham

- If you are an RA delegate, be on the lookout for the Spring RA 30-day mailing. This packet is sent to all RA delegates. If the RA is held at the end of April, this may have been mailed out late last month.
- Continue with the bargaining process you have established. Ensure that your crisis committee has a plan and the resources needed to move forward.
- Continue to work on the school board election. Be sure to involve as many members in the process as possible. Also, continue to work with the other unions in your district to get your candidates elected.
- Make plans to attend the MEA Spring RA. If you are not an elected delegate, you can attend as an observer. For more information, contact the MEA Executive Office.
- Make your travel reservations if you will be attending the NEA RA. Be on the lookout for a large packet that will be mailed to all delegates from MEA. It will contain all of the information you need to be prepared to attend the RA.
- Seek members (or volunteer yourself) to fill vacancies on MEA Committees, Commissions and Task Forces for the coming year. For more information, go to **www.mea.org/leaders** or contact the MEA vice president.
- Have the treasurer present the proposed local association budget to the executive board for review and recommendation.
- Apply for the MEA Local Presidents Academy. Applications are sent out in April via e-mail.



Delegate, delegate, delegate! You cannot do everything yourself. Most members are happy to get involved in small projects that are short in duration and don't involve a lot of meetings, especially if you ask them in person.

—Susan Duda-Osborne, Van Buren

- Go to **www.mea.org** to find out what happened at the Spring RA. Be sure that you and your RA delegates share this information with members.
- Continue with the bargaining process you have established.
- Prepare and send thank you notes to ALL who volunteered to help the local association in some way this year.
- Have your association reps/stewards begin the process of collecting summer e-mails/contact information for all members. This is especially important if you are bargaining.
- Make sure you have all vacant association positions filled for next year.
- Finalize and approve budget for next year if May is the last month in which you will be meeting for the school year.
- Continue to work on the school board election. Get out the vote on election day and celebrate your victory(ies)!
- Spend time with members who are facing displacement or layoff.
- Make plans to: recognize members who are retiring; encourage members who are being laid off or displaced; and/or celebrate the end of the school year.
- Register to attend the MEA Summer Leadership Conference. As a local president, you can attend for ALMOST NO COST. If you are unable to attend, you may send a designee in your place and his/her expenses will be paid. For more information, go to **www.mea.org/Conferences**.

Never go to the bathroom during a meeting. You never know what you'll come back to!

— Jean Evans, Roscommon

- Ensure that all association records are up-to-date and accurate, e.g., grievance, dues, budget, etc.
- Meet with your local RA delegates to discuss issues that will be addressed at the NEA RA.
- Meet with your executive committee to evaluate how well your local association met the goals you established last fall. Begin the goal-setting process for the next school year.
- If you haven't done so already, register to attend the MEA Summer Leadership Conference. Go to **www.mea.org/Conferences** for more information.
- If a new treasurer or president has been elected, notify bank/credit union of changes and have a new signature card prepared.
- Make plans with your executive board to get together over the summer for a planning session/barbecue (or picnic).

Surround yourself with a strong core group of people who are willing to craft e-mails and other documents, hold meetings, plan events, listen to you vent and dream up ideas at all hours of the day or night.

—John Mierz, Whitehall



Remind yourself often that it's business, not personal.

—Rick Greene, Farmington

Currently, there are a variety of BFCL publications (some with companion CDs) available for distribution. There are special Higher Ed editions of four of the most popular BFCL booklets. The following publications are available by contacting Teri Battaglieri (tbattaglieri@mea.org or 800-292-1934) or can be downloaded at www.mea.org/Leaders.

- BFCL Local Self-Assessment: It All Starts Here!
- Getting Strategic: Long-Range Planning for Local Leaders
- Association/Building Representative Training: Starting with the Basics (Higher Ed version available)
- A Year in the Life of a Local President - a planning calendar for local presidents
- You've Been Elected, Now What? - a handbook for local officers
- Communications 101: Developing a Local Communications Strategy that Works (Higher Ed version available)
- Crisis Planning: It's Never too Early to Start (Higher Ed version available)
- PAC Attack – Everything You Need to Know to Create a PAC-tive Local Association!
- United We Stand: Coalition Building for EA and ESP Locals
- Processing Gripes and Grievances: What Every Member Advocate Needs to Know (Higher Ed version available)

Be honest and up front – even when it's bad news.

–Brooke Davis, Clarkston

MEA

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