

Building Full Capacity Locals

2009–10 Report

A full capacity local is one that is vibrant, relevant, strong and focused on member service. Full capacity locals have well-trained proactive leaders and highly engaged, well-informed members.

In August of 2005, MEA launched the Building Full Capacity Locals (BFCL) initiative, which focuses on developing the capacity of each of its 1,200 local associations. In addition to providing the time, training and tools that local leaders need in order to do their jobs, BFCL has grown to encompass a number of other member engagement and retention initiatives designed to strengthen local associations.

The BFCL initiative is structured around eight indicators of a full capacity local:

- Member advocacy
- Communications
- Financial and membership systems
- Governance structure
- Leadership team development
- Long-range planning
- New member induction
- Political action

BFCL continues to receive a very enthusiastic response from local leaders and staff around the state and has been embraced at all levels of the organization.

To date, thousands of copies of BFCL materials have been requested and distributed to local leaders and staff. In addition, Michigan's BFCL materials are currently used by the NEA as well as a number of NEA's state affiliates to support their own efforts to increase local association capacity. These state affiliates include: Florida, Indiana, North Dakota, Georgia, Kansas, Iowa, Minnesota, Massachusetts, Illinois, South Dakota and Oregon.

What follows is a detailed report of the BFCL initiative during 2009-10.

"As a result of BFCL, I am a stronger leader, and I am building a stronger local association."

BFCL Trainings

During the year, BFCL provided seven statewide trainings that were open to all local leaders at no charge. Two of the trainings were designed for local leaders and their UniServ directors to attend together. Each training session focused on one or more of the indicators of a full capacity local. Sessions accommodated 75-200 people.

This year, almost 900 local leaders and UniServ directors, representing more than 250 local associations, attended these seven trainings.

Statewide Presidents Summit—Designed for local presidents, this two-day training focused on providing both newer and experienced presidents with the opportunity to network and learn about ways to better serve members.

Advocacy Academy in Traverse City—Designed to address the needs of local leaders including association representatives, this training offered sessions in grievance processing, crisis planning, fighting privatization and enhancing communication with members.

Ladies Day at the MEA—Designed to focus on the unique needs of women in leadership positions.

Money Matters!—Designed for local treasurers and presidents, this training focused on working together to successfully manage local association financial resources.

Dollars and Sense Academy—Designed for leaders and their UniServ directors to attend together, this three-day training focused on providing participants with a solid understanding of financial analysis tools and techniques to use to understand school district finances and to increase success at the bargaining table.

Building a Full Capacity Local Option Council—Designed for local option coordinating council leaders, this training focused on the employment relationship and the nuts and bolts of operations in local option councils.

Tough Times Bargaining Boot Camp—Designed for local leaders and their UniServ directors to attend together, this training focused on the bargaining situation in Michigan and how to effectively deal with shrinking budgets, contract re-openers, new school reform laws and the threat of privatization at the bargaining table.

“I’ve left every BFCL training motivated and with innovative ideas to help my local reach its full potential.”

In addition to the statewide trainings held this year, BFCL also helped to plan, fund and implement other initiatives designed to increase member engagement.

School Funding Summit

Held in January 2010, the School Funding Summit was a collaborative effort by MEA, SOS and Middle Cities. Coordinated by MEA's MERIT team, the purpose of the summit was to bring education stakeholders together to learn about school finance, why the current system isn't working, and the changes that can be made to the system to guarantee adequate, equitable, stable funding for Michigan's public schools. More than 400 people registered to attend this event.

SPARKS: Engaging a New Generation of Members

The SPARKS program is designed to focus on engaging newer members in the association and developing potential leaders. It is targeted specifically toward members who are in their 20s and 30s and have fewer than seven years experience in public education.

The SPARKS program is a joint effort between BFCL and MEA Field Services. This year, the following groups were approved and received funding to hold SPARKS retreats:

- 17-B and 17-C Coordinating Councils
- MSU APA
- 7-G and 7-J Coordinating Councils
- 13-CD, 13-E, 9-E/9-13 Coordinating Councils
- 7-E and 7-I Coordinating Councils
- Kalamazoo/Portage/Mattawan
- 7-B (SOMEA) Coordinating Council

"As a result of attending a SPARKS retreat, I became the vice president of my association! I feel like people trust me when I share association information, and that is due to the higher level of confidence I have gained through attending the SPARKS retreat."

Just Between Presidents

Started last year by MEA President Iris K. Salters, Just Between Presidents is a president-to-president outreach program, designed to foster a closer relationship between local associations and the MEA and between local presidents and President Salters. This year, the program included the "Just Between Presidents" quarterly newsletter, which contained information about current issues, ideas and upcoming events and a special "for presidents only" breakfast at the Summer Leadership Conference.

RA Delegate Education Program

This year, new delegate orientations were held at the MEA's Fall and Spring RAs and also at the NEA RA in New Orleans. Approximately 175 delegates took advantage of these sessions. There was also a region political action program at the Fall RA for all delegates, which included special region breakout/discussion sessions for delegates led by each region's Board members.



Proud Union Member Initiative

Introduced at the 2009 Summer Leadership Conference, this initiative was designed to increase union pride among MEA members and union awareness in local communities. Union Pride was emphasized in the 2009-10 MEA calendar, in the MEA Voice and at major MEA events and conferences, and a section of the MEA Web site was devoted to Union Pride information and merchandise.

The initiative included a variety of union pride merchandise, which was made available to local associations upon request and at no charge including:

- MEA Proud Union Member CD
- Buttons
- Stickers
- "Middle Class Union Made" booklets and talking points cards
- Removable window clings
- Union \$ stickers for checks and credit card receipts

Members could also special order:

- Proud Union Member recyclable grocery bags, mugs and pencils
- Proud Union Member polo shirts, T-shirts and long-sleeve oxford cloth shirts

One of the goals of the BFCL initiative is to provide local leaders with resources to help them increase local capacity and engage more members. All BFCL resources are compilations of the best ideas and materials used around the state at association workshops, conferences and trainings, many of which were developed by MEA staff and leaders. Each is easy to use and full of ideas that can be implemented quickly by local leaders with little time and limited resources.

During 2009-10, thousands of copies of BFCL publications were distributed at MEA conferences and RAs and also at BFCL trainings and workshops. In addition, more than 7,000 publications were mailed out on e-mail or phone request to nearly 150 local associations and coordinating council/field offices, and numerous requests were filled for NEA staff and leaders and staff from NEA's state affiliates.

Currently, there are 15 BFCL publications and two BFCL CDs available for distribution:

- **BFCL Self-Assessment**—designed to help local leaders assess their organization in each of the eight indicators of a full capacity local; results of the assessment serve as the catalyst for local strategic planning.
- **Getting Strategic**—the follow-up to the BFCL Self Assessment; a guide to long-range planning that can be adapted to fit the unique needs of each local association.
- **Presidents Planning Calendar**—a month-by-month look at the responsibilities and opportunities for local presidents; designed to help local presidents get the job done each month.
- **You've Been Elected... Now What?**—produced in conjunction with the MEA Organizing Department, this booklet focuses on the jobs of the president, vice-president, secretary and treasurer. It's filled with do's and don'ts for local officers.
- **PAC Plan of Attack**—designed to help local leaders plan and implement fun, successful local PAC drives and increase member political involvement.
- **Starting with the Basics: Building/Association Representatives and Stewards**—addresses the specific needs of local ARs; offers simple, concise information on the basic things that ARs must know in order to best serve members. Higher Ed version available.
- **Communications 101: Developing a Local Communications Strategy That Works**—focuses on designing an effective local internal and external communications plan. Higher Ed version available.

- **Communications 101: The CD**—accompanies the booklet; contains samples of successful newsletters, programs, activities and Web sites created by local associations around the state in addition to templates, graphics and other information to help locals develop their communications plans.
- **Crisis Planning: It's Never Too Early to Start!**—designed to help local leaders develop an effective crisis plan at the same time they begin to plan for bargaining. Higher Ed version available.
- **United We Stand... Coalition Building for EA and ESP Locals**—designed to focus on helping local EA and ESP units form coalitions within a school district for the purpose of fighting privatization, bargaining better contracts and becoming stronger politically.
- **Processing Gripes and Grievances**—designed to provide the basics of processing members' "gripes" and grievances in a systematic, organized and constructive manner. Higher Ed version available.
- **Processing Gripes and Grievances: The CD**—accompanies the booklet; contains in-depth information and resources that will enhance knowledge and skills in the areas of grievance processing and addressing member concerns.
- **Parliamentary Procedure for Local Presidents: Keeping It Simple**—designed to provide local presidents with the information they need to run more productive and effective meetings.

This year marked the third year of the BFCL Local Funding Program. The program was established so that local leaders can access the necessary funding to support new projects and activities designed to increase local, coordinating council or region capacity in one or more of the eight indicators. The success of and demand for this program ensures that it will be continued next year.

As of June 2010, the following groups have requested and received BFCL funding:

Huron Valley SSP	Traverse City CAPSA
Huron EA	Beaverton EA
Manchester ESP	Ypsilanti EA
Ypsilanti SSA	Decatur EA
Hudson ESP	Bay City ESP
Bedford EA	Kelloggsville EA
Grosse Pointe EA	Van Buren EA
West Branch-Rose City EA	Negaunee EA
Waterford Coordinating Council	Ludington EA
Holly ESP	Kaleva Norman Dickson EA
Brighton ESP	Mattawan EA
Cass City EA	Traverse City EA
Saginaw Valley Support Staff	Clarenceville EA
Monroe County EA	Tuscola ISD Paraprofessionals
Roscommon EA	Traverse City EA

“The funding we received from BFCL helped us increase our PAC contributions from 12% to 74% of our members contributing this year!”

BFCL Local Presidents Academy (LPA)

Launched three years ago, the goal of the Local Presidents Academy (LPA) is to develop proactive, well-trained, confident, strong local association presidents who have the time and resources they need to do their jobs as well as the skills necessary to identify and mentor up-and-coming leaders in their local associations. The LPA is a two-year program.

This year 52 local presidents participated in the LPA and participated in a variety of leadership experiences including attendance at trainings, conferences, region and coordinating council meetings, MEA RAs, etc. Participants were from all four MEA zones and represent EA and ESP locals from nearly every region in the state.

All LPA participants are required to mentor an up-and-coming leader in their local association. In addition, all participants set and worked toward achieving goals which focused on coalition building between EA and ESP locals in the school district and/or getting newer members engaged in the local.

LPA participants regularly communicate with each other through a mail group established for them and met several times during the year for special work sessions.

The LPA will continue in 2010-11 with 58 participants – 21 returning for their second year and 37 will be starting their first year.

“The training, ideas and networking opportunities offered as part of the LPA have inspired me and helped me to offer even better service to my members.”

1st year LPA Participants:

Laurie Adams	Ann Arbor ESP	David Lengel	Clarenceville EA
Nancy Barrows	Plymouth-Canton EA	Tony Lucchi	Troy EA
Wade Batey	Davison ESP	Wendi McCausey	Hastings EA
Susan Baumann	Waterford ESP	Sharon McConnell	Walled Lake ESP
William Beson	Riverview EA	Pamela Metcalf	Pennfield EA
Kathleen Bolton	Plymouth-Canton ESP	Steve Myers	Charlotte EA
Nora Bouchard	Alpena City ESP	Joe Ann Nash	Buena Vista EA
Frank Burger	Carman-Ainsworth EA	Julie Naughton	Garden City EA
Rikkii Clarent	Huron Intermediate EA	Marvin Nordeen	Traverse Bay ISD EA
Jane Crafts	Bedford ESP	Kimberly Pilarski	West Bloomfield EA
Lance Davis	Pontiac EA	Cindy Rivet	Goodrich EA
Steven Durfee	Benton Harbor EA	Dorene Schick	Alcona EA
Steven Ellison	Grosse Ile EA	Paul Siembida	McBain EA
William Fleck	Brighton ESP	Karen Sullivan	Jackson County EA
Brad Geesaman	Vicksburg EA	Randy Surline	West Branch-Rose City EA
Jason Gillespie	Ferndale EA	Dorian Tassie-Lowden	Northwest EA
Mary Jo Hein	Rogers City EA	Patricia Toth	Port Huron ESP
Cary Heinz	Bridgman EA	Lou Ann Vidmar	Covert EA
Shannon Jablonski	Gladwin EA		

2nd Year LPA Participants

Ellie Adams	Huron Valley ESP	John Mierz	Whitehall EA
Colleen Burke	Capac EA	Tammy Moored	Pine River ESP
Susan Duda-Osborne	Van Buren EA	Joanne Payne	Montrose EA
Jean Evans	Roscommon Area Public Schools EA	Robin Perry	Bedford ESP
Kevin Fortune	Ypsilanti ESP	Joy Robinson	Muskegon Heights EA
Steve Franko	Vassar EA	Deb Shoultz	Bloomfield Hills ESP
Alan Hawley	Beaverton EA	Kim Stephens	Portland ESP
Nikki Inches	Tuscola ESP	Jennifer Taylor	Grass Lake EA
Debbie Lotan	Waterford ESP	Lou Ann Thompson	Bay City ESP
Terri McDermott	Traverse City ESP	Donice ZiBerna	Alpena City EA
Jason McElrath	Kaleva Norman Dickson EA		

Getting the Word Out

Information about the BFCL initiative is primarily disseminated through www.mea.org and www.mymea.org. All publications and training announcements are posted on these sites. BFCL updates and training registration information are sent via e-mail to leader and staff mail groups.

In addition:

- All newly elected local presidents were mailed selected BFCL publications and information twice during the year.
- Officers of newly organized units were made aware of BFCL through the Organizing Department and contacted by the BFCL coordinator.
- A BFCL information table was set up at all MEA conferences and both RAs.
- Informational sessions were presented at MEA conferences.
- Special BFCL workshops were held around the state upon leader and staff request.
- All presidents of Higher Ed units were mailed a packet containing the Higher Ed versions of BFCL publications.
- UniServ directors received mailings containing information about the BFCL local funding program, BFCL trainings/events and the Local Presidents Academy.

"Because of BFCL, the MEA is no longer a faceless organization to my members."

To date, the following training sessions are scheduled to be offered in 2010-11 as part of the BFCL initiative. All will be held at MEA headquarters unless otherwise indicated. The list is not complete since it is anticipated that more trainings will be added based upon the requests and needs of local leaders.

Registration information will be sent out via e-mail six to eight weeks in advance of each training.

Money Matters!

- August 18

Designed for local treasurers and presidents, this training will focus on providing the necessary information needed to work together to establish a goal-driven budget, successfully manage local finances, implement a system of internal controls, etc.

Statewide Presidents Summit

- September 17-18

Designed for local presidents, this two-day learning and networking experience will focus on providing both newer and experienced local presidents with the information and resources needed to better serve their members.

Dollars and Sense Academy (a three-part training)

- October 7, November 9 and December 7

Back by popular demand, this three-part training is designed for both local leaders and their UniServ directors. The focus will be on understanding and knowing what to look for in a school district's budget and audit as well as assessing district spending trends, priorities and financial health. Participants will also learn how to present financial information in a simple, clear and compelling way.

Advocacy Academy (in Traverse City)

- October 15

Designed to address the needs of local leaders, topics will include: RTTT legislation; fighting privatization; crisis planning; association representative training; grievance processing; and enhancing communication with members.

NEW! Tough Times Bargaining Boot Camp (in Kalamazoo)

- October 29

Designed for local leaders and their UniServ directors, this intensive training day will focus on all facets of bargaining in the current economic and political climate.

NEW! Education Reform and You

- October 15 in Traverse City (in conjunction with Advocacy Academy)
- October 29 in Kalamazoo (in conjunction with Tough Times Bargaining Boot Camp)
- November 18 in Sterling Heights (6A/6C office)

As a result of Race to the Top and the reauthorization of ESEA, last December the Legislature passed laws changing the way we must bargain teacher evaluations, teacher pay for performance, improving low-achieving school, and privatization. This day-long session will contain background information and practical advice on how to implement this on the local level.

Critical Issues Summit

- January 21

Last January, more than 400 MEA leaders and staff and education stakeholders from across the state registered to attend the first Critical Issues Summit on school funding. Though focus of this year's summit will be determined at a later date, you'll want to reserve the date and make plans to attend this very important event.

Tough Times Bargaining Boot Camp (in Livonia)

- March 25

Designed for local leaders and their UniServ directors, this intensive training day will focus on all facets of bargaining in the current economic and political climate.

Ladies Day at the MEA

- May 13

Due to popular demand, this "for women only" event has become a yearly tradition. Focusing on the unique needs of women in leadership positions, Ladies Day will be expanded this year to include BOTH local leaders AND their UniServ directors (women only, of course).



Building Full Capacity Locals

Local Funding Request 2010-11

*BFCL funds are available to support **NEW** ideas, activities and programs, especially those designed to engage newer members or build a greater sense of union pride among all members.*

One of the goals of the **BFCL** initiative is to provide local leaders with the resources they need to strengthen their local associations and get more members actively involved.

Any local (or group of locals) dedicated to developing its capacity is eligible to receive funds to support a **NEW** program, training or activity. It's EASY to request funds:

- Take the **BFCL** Self-Assessment (available at www.mea.org or by contacting Teri Battaglieri at tbattaglieri@mea.org).
- Identify one or more of the **BFCL** indicators on which your local will focus as a result of the Self-Assessment.
- Set some goals and develop a plan for reaching those goals.
- **Completely fill out the application below.**

Name of applicant _____

Association position held _____

Name of local association/group _____

Number of members in above _____ Region _____

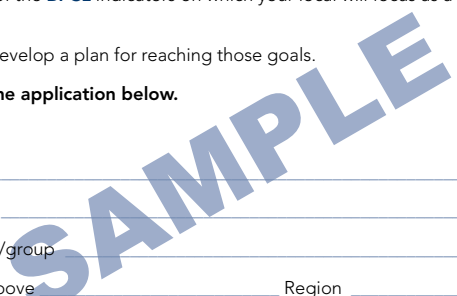
E-mail address _____

Who took the **BFCL** Self-Assessment in your local? _____

When was it taken? (month/year) _____

On which **BFCL** indicator(s) will your group focus this year? (The **eight indicators of a full capacity local** are: advocacy, communications, financial and membership systems, governance, leadership team development, long-range planning, new member induction and political action.)

What specific goal(s) have you set to increase local capacity in the indicator(s) you listed above?



MEA

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*The mission of the MEA is to ensure that the education of our students and
the working environments of our members are of the highest quality.*

