

FOR COMMENT

Presidents Planning Calendar

A Year in the Life of a Local President



Building Full Capacity Locals

MEA

Michigan Education Association

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, is 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 MEA Field Services at 800-292-1934 ext. 2941 or visit www.mea.org/BFCL.

Important contact information:

<p>MEA Headquarters</p> <p>1216 Kendale Blvd. PO Box 2573 East Lansing, MI 48826-2573</p> <p>800-292-1934</p> <p>www.mea.org</p>	<p>MESSA</p> <p>800-292-4910</p> <p>www.messa.org</p>	<p>MEA Financial Services</p> <p>800-292-1950</p> <p>www.meafs.com</p>
--	---	--

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/ email addresses, dates for MEA conferences, trainings and other major events, as well as information about MESSA, Michigan Public School Employees Retirement System (MPSERS), 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 website 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, if any

Get connected...

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

To set up your email 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.

July and August

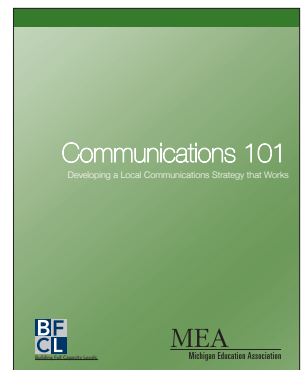
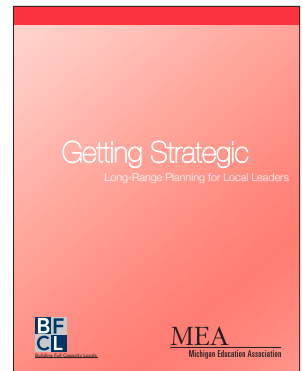
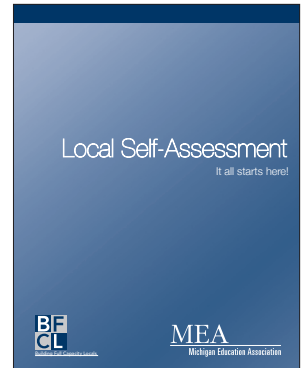
- Attend **MEA's Summer Leadership Conference**. Local presidents can attend this conference at (almost) no cost! Check out www.mea.org under Upcoming Events, then Conferences and Trainings, for information.
- Take a look at all of your local association's committees. Make sure you have a chairperson 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 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 to get members more politically involved.
- 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 the **BFCL Communications 101** booklet to help with planning.

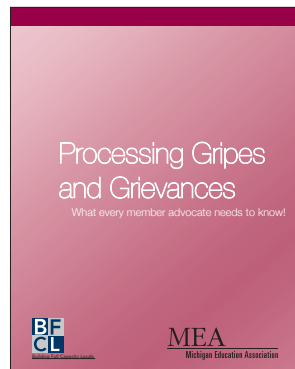
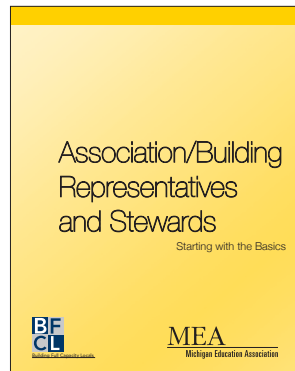
- Request (from the district/college HR dept.) the names, contact information and assigned positions of any new members as well as a list of members who have left employment.
- Plan a personal contact with each new member. Provide new members with an overview of the association, inform them of the date for the new member reception and 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 and a 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.
- 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 and www.mea.org/BFCL to see what's new for local leaders.
- With the help of your UniServ director, plan training for your association representatives/stewards.

Request the ***BFCL Association Representatives/Stewards*** and ***Handling Member Gripes and Grievances*** booklets for your training.

- Ask the treasurer to provide a monthly financial update.



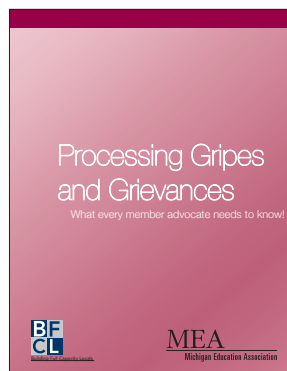
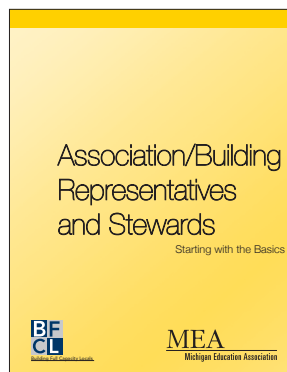
September

- 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 statements 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 the **BFCL Association Representatives/Stewards** and **Processing Member Gripes and Grievances** booklets for your training.

- Watch for the leadership newsletter that is mailed out quarterly.
- 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!
- 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.



October

- Hold your local PAC drive.
- Have an 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, subscribe to *Capitol Comments*, MEA's political e-newsletter. *Capitol Comments* contains the latest political, legislative and election information, and serves to alert members when specific action is necessary.

To subscribe to *Capitol Comments*, go to www.mea.org/signup.

- Alert your PAC committee to start recruiting candidates for upcoming vacancies for school board/board of trustees.



November

- 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.
- 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 at the region meeting in December.

December

- Celebrate the holiday season by doing something special for your executive board, committee chairs and association reps/stewards.
- Appoint a budget committee to begin work on next year's local association budget.
- Work with the treasurer to make sure all fee payers process their Hudson packets by the deadline.
- Register to attend the **MEA Bargaining/Political Action Conference**, which is usually held in early February.

Check out www.mea.org under Upcoming Events, then Conferences and Trainings, 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-grants to learn about the awards and nomination process. All submissions must be received by February. Awards are presented at the Spring RA.

January

- 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 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 under Upcoming Events, then Conferences and Trainings.
- 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.

February

- Attend the **MEA Bargaining/PA 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.
- Get information from your UniServ director about your zone’s local lobbying activities.
- 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.

March

- Continue with bargaining preparation.
- Attend the **MEA ESP Conference**.
- Establish a committee to review and recommend changes to the 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 the strategy for school board election to members—assign roles/responsibilities, etc. Get a 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.

April

- If you are an RA delegate, be on the lookout for the **MEA 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/BFCL 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 email or call 800-292-1934, ext. 2941.

May

- 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 emails/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 the 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 under Upcoming Events, then Conferences and Trainings.

June

- 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 under Upcoming Events, then Conferences and Trainings, 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.

BFCL Resources

What do you need?

Start with your UniServ director! He/she has a wealth of information that can help you build a strong coalition of EA and ESP locals. He/she can also help you access the support and service you need from MEA.

Need more copies of this booklet, information on coalition building or other resources designed to help you strengthen your local and get more members involved?

Copies of the following MEA publications are available by contacting MEA Field Services at 800-292-1934, ext. 2941. Many can be downloaded from www.mea.org/bfcl.

- *Association/Building Representatives and Stewards: Starting with the Basics*
(Higher Ed version also available)
- *Communications 101: Developing a Local Communications Strategy that Works*
- *Getting Strategic: Long-Range Planning for Local Leaders*
- *Generation Next: Ideas for Engaging New Members in the Association*
- *Local Self-Assessment: It All Starts Here!*
- *Parliamentary Procedure for Local Presidents: Keeping It Simple*
- *Presidents Planning Calendar: A Year in the Life of a Local President*
- *Processing Gripes and Grievances: What Every Member Advocate Needs to Know!*
(Higher Ed version also available)
- *United We Stand: Coalition Building for EA and ESP Locals*
- *You've Been Elected... Now What? Local Officers Handbook*

You've Got Connections!

The MEA Communications and Public Policy Department is a group of talented, creative and dedicated people who want to help you develop and implement a successful local communications plan.

If you need it, just ask!

- Message development and management tailored to your association's needs.
- Targeted materials designed to help you connect with your new members.
- Crisis PR—contact your UniServ director to help you develop a crisis strategy to communicate with members, the community and the media.
- Assorted local materials may be created through MEA Creative Projects. From business cards to placemats to flyers, our award-winning graphic artists serve your design needs free of cost and our in-house print shop features low prices and a large selection of stock. Request a job through your local field office.

MEA

Communications and Public Policy
800-292-1934



MEA
Help Center
866-MEA-HELP
866-632-4357
www.mea.org 

*On the phone or online,
get answers to your MEA questions.*



MEA

Michigan Education Association

www.mea.org

1216 Kendale Blvd., PO Box 2573, East Lansing, MI 48826-2573

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.



EJT70993-WEB-8/15