

**FOR COMMENT**

# You've Been Elected... Now What?

Local Officers Handbook



Building Full Capacity Locals

**MEA**

**Michigan Education Association**

## Dear Local Leader,

A full capacity local is one that is vibrant, relevant, strong and dedicated to member service. Critical to such a local is a knowledgeable, well-trained leadership team. In order to do the best job possible, each member of the leadership team needs to have a good understanding of what his/her job entails and the responsibilities that go along with it.

The purpose of this booklet is to provide local officers with some basic information that can help them become more effective in carrying out their responsibilities. It's a great starting point, but is not intended to be all-inclusive. It can serve to supplement materials that you may already have, including your local constitution and bylaws and other guidelines and past practices that may have been established in your local over the years.

In addition to this booklet, there are a number of other MEA publications designed to help you strengthen your local and hone your leadership skills in a variety of areas. They are referenced throughout this booklet, and you can request copies along with other information, training and support by contacting MEA Field Services at 800-292-1934 ext. 2941 or download at [www.mea.org/BFCL](http://www.mea.org/BFCL).

For more in-depth information about leading your local, you may want to download and read **MEA's Leader Handbook**, which is available at [www.mymea.org](http://www.mymea.org), under Publications.

If you are interested in learning more about MEA's initiative designed to strengthen local associations and provide local leaders with the time, training and tools they need to do their jobs, click on [www.mea.org/BFCL](http://www.mea.org/BFCL) or contact MEA Field Services at 800-292-1934 ext. 2941.

*This booklet is a compilation of materials resulting from the efforts and talents of many current and past MEA headquarters and field staff members and local leaders—too numerous to name, but not too numerous to thank.*

## A few words about elections (now that you've been elected)...

It's very important that you notify MEA about the results of your local elections.

Local election results should be reported within 30 days of the date of the election. Forms for reporting election results are available on the Web at [www.mymea.org](http://www.mymea.org) in Departments; click on Executive Office/Governance. If you are a new president or have questions, call your local UniServ office.

Report newly elected local officers on the Officer Election form, which should be filled out and sent to your local UniServ office for processing. The election results for MEA RA delegates and alternates should be reported on the MEA RA Delegate and MEA RA Alternate election forms. Complete these forms and send to the MEA Finance/Membership Department.

Reporting local election results in a timely manner will ensure that RA delegates get all mailings and materials pertinent to the RA. Further, it will ensure that all officers receive information and materials that will help them do their jobs and keep members informed.

## The President

The president is responsible for the smooth and efficient operation of the local association (union). A willingness to serve with a cooperative spirit is necessary in order to work effectively with co-workers and administrators. The president is the visible leader of the local and serves as a spokesperson with the school district, news media and other groups.

The presidents' primary responsibility is to oversee the operation of the local. The president must ensure that the functions of the local are being carried out by the appropriate committees and members.

The president's key source of support from MEA is the local UniServ director. In addition to bargaining and grievance help, your UniServ director provides day-to-day support on all the issues you face as a local president. They provide membership trainings, guidance on legal issues and serve as your clearing house to all the services provided by staff at MEA headquarters. It is important that you work closely with your UniServ director and keep him/her informed as issues arise.

The main function of the local association is to represent its members in such things as:

- **Bargaining and maintaining the contract**
- **Processing grievances**
- **Managing local dues dollars**
- **Making local decisions**

Each of the above functions is carried out by the officers and/or committees. The president must therefore ensure that:

- **Committees and officers exist to take care of the above local functions.**
- **Committees and officers are doing their jobs effectively.**

### President's To-Do Checklist

- Register for a free mymea.org email account at [www.mymea.org](http://www.mymea.org).
- Make sure that your UniServ office, MEA and NEA are notified in writing of your election. (Refer to page 2.)
- Talk to your predecessor. Get copies of any minutes, correspondence and other significant papers pertaining to your position. Especially look over reports and actions of the last year so that the program is continuous and there are no loose ends.
- Call on your superintendent, board president and news media to introduce yourself and to seek their cooperation in improving the educational program and staff morale.
- Check on significant dates ahead—such as the MEA and NEA Representative Assembly, region and coordinating council meetings, leader trainings and school board meetings. Make plans to attend.
- Make a list of key association officers, committee chairpersons, building representatives/stewards, school board members, superintendent, and key community contact people. Include phone numbers, email addresses, etc.

- Meet with your executive committee or board of directors and check to make sure that committees are organized and continue operating.
- Establish all necessary task forces and committees.
- Establish a list of people interested in participating in local association activities. Keep a “talent file” of these people and call upon them as needed.
- Hold a preliminary meeting of the board of directors for the purpose of planning and setting goals for the year.
- Set a monthly meeting schedule for the board of directors and executive committee.
- Prepare an agenda in advance for each board of directors and executive committee meeting, and send it out in advance of each meeting.
- Check with the local secretary before each meeting to make sure that all necessary committee reports, materials, minutes, correspondence, etc., are on hand.
- Require your treasurer to produce and present a monthly financial report for the board of directors and the executive committee.
- Require each committee chairperson to present a monthly report to the board of directors or executive committee and a quarterly report to the general membership.
- Work on achieving the goals you set for the year. Keep the membership informed of what they are and the progress that is being made.
- Familiarize yourself with and follow accepted rules of parliamentary procedure in conducting meetings. (See pages 13-15.)
- Obtain a copy of your district’s employee directory (if there is one).
- Elect delegates to the coordinating council and region council. Make sure they attend meetings and report back to the executive committee and board of directors.
- Make sure that your treasurer understands the dues transmittal obligations.
- Make sure membership materials are distributed.
- Update bank account signature cards.
- Familiarize yourself with your local’s constitution and bylaws.
- Communicate regularly with the other officers, especially the vice president.
- Establish and maintain contacts with other local association presidents and attend meetings of local presidents, including the statewide Presidents Caucus. Contact the MEA Executive Office to get contact information for this caucus.
- Develop a quality working relationship with your UniServ director.
- Update and submit your local governance documents for review by MEA’s Governance Review Committee if this has not been done in the past five years.
- Learn about the trainings, materials and publications MEA has for local presidents by going to [www.mea.org/BFCL](http://www.mea.org/BFCL).

## The Vice President

In many local constitutions, the job of the vice president is not clearly spelled out. Often, the job is defined as one that involves performing duties “as assigned by the president.” In order to have a team of officers that functions at the highest level, it is suggested that you take the time to identify the expectations and job responsibilities of the vice president.

### **In general, it should be the responsibility of the vice president to:**

- Serve as the “assistant president” helping and supporting the president in all of his/her duties.
- Be prepared to preside over meetings in the president’s absence.
- Be ready to assume the role of president.
- Serve as a trustworthy, confidential “sounding board” for the president.
- Serve as a co-signer on association bank accounts as authorized.
- Know the contract.
- Encourage members to get involved in the association.
- Pick up criticisms and “gripes” that are bothering members; lend a sympathetic ear.
- Be familiar with the local and MEA constitution and bylaws.
- Serve as chairperson, on occasion, of a program or other designated committee and know the functions of all committees.

### **Other duties as assigned...**

In addition to the above, many local vice presidents assume other responsibilities as assigned by the president.

The vice president may:

- Serve as the association’s grievance chairperson.
- Serve as the association’s crisis chairperson.
- Attend coordinating council or region meetings as a delegate or in place of the president.
- Represent the association at school board meetings.
- Serve as the association’s membership chairperson.
- Serve as the elections chairperson.
- Head up a special task force to resolve specific long-term member concerns, such as building-quality issues or work safety issues.
- Serve with or in place of the president on district committees such as restructuring and long-range planning.
- Take charge of induction/mentoring of new association members.
- Oversee all local association committees.

## The Secretary

The secretary is the keeper of all records, minutes and correspondence of the union. A well-organized secretary will be of great assistance to the other officers, the board of directors and the committees of the union.

### It is the responsibility of the secretary to:

- Take the minutes at all meetings of the association. The minutes should be an accurate interpretation of what goes on in these meetings.
- Make the minutes the permanent record of association business and activities and keep a permanent record of all minutes.
- Keep a systematic method of filing all correspondence, association records, treasurer's reports, membership roster, up-to-date copies of constitution and bylaws, a list of all committee members and their contact information, and copies of committee and miscellaneous reports.
- Send out notices of regular and special meetings of the association. Notify the UniServ office of meetings.
- Carry on the correspondence of the association.
- Work to encourage members to become more active in the association and encourage new leadership.

## Meetings

### 1. Before the meeting:

The president and the executive board generally develop the meeting agenda, though suggestions may also come from members, committee chairs, etc. The agenda should be sent out by the secretary in advance of the meeting. A good idea is to send it out when you send out notice of the meeting. Further, you may want to send out copies of the minutes from the last meeting.

Prior to the meeting, don't forget to confirm the time, place and room arrangements including special equipment needed. Remind any special guests of the meeting and provide directions, etc. You should have paper, pens, laptop and other materials. You should also have a roster of attendees. If your association uses a sign-in sheet to record attendance, it's a good idea to have that prepared in advance of the meeting. You should also have multiple copies of the minutes as well as copies of other reports or information that will be covered at the meeting.

### 2. During the meeting

The secretary's job during the meeting is to keep an accurate, permanent record of what transpired during the course of the meeting (minutes). More on this below.

### 3. After the meeting

Send thank you notes to speakers, guests and others. Send reminders to members assigned special duties. Notify persons and committees affected by any actions taken at the meeting. File what needs to be filed and place dates decided upon in the calendar.

## The minutes

The secretary's most important responsibility is to keep an accurate, permanent record of the minutes of meetings of the association and the executive board and/or board of directors.

- **The agenda will offer a guide for an outline of the minutes.**

Study the agenda and make a well-spaced skeleton of it. If you fill it in as the meeting progresses, the minutes will be very close to being completed by the time the meeting is over. List members, visitors, absent or excused members. State only motions that are made and seconded with the names of maker and seconder. List the items of unfinished business, as well as important dates and facts to be remembered. Be sure to state the time of adjournment and always sign your name and the date.

- **Recording motions**

Be sure to include the name of the person making the motion, as well as the name of the seconder. Record whether the motion was carried or defeated.

- **Recording the remarks of speakers and discussion**

Be brief, get main points and record differing points of view. Do not try to record every word. Report special instructions and procedures. Check with speakers to verify accuracy on topics that are controversial.

- **Pre-approval of the minutes and final copy**

Have the president read over the minutes and approve them before publishing the final version of the minutes. Be sure to duplicate them for the next meeting. You may want to publish abbreviated minutes—special email or newsletter—for quick distribution to the entire membership.



# The Treasurer

## The buck stops here!

The treasurer is essential to the efficient operation of the union. The treasurer is responsible for much more than keeping accurate financial records.

### The following are essential duties of the local treasurer:

- Prepare the annual local budget proposal with the assistance of the president and budget committee (if applicable).
- Receive all revenues, including dues, and deposit all money in the bank.
- Transmit dues to MEA along with the necessary forms.
- Maintain an accurate accounting of all local funds. Keep a ledger showing all money received and all money spent.
- Pay all bills of the local.
- Sign checks for the local. All checks should be signed by two of the three authorized officers.
- Provide all necessary information and books to the annual audit committee.
- Report regularly to the board of directors and the membership concerning the income, expenditures and balance of local monies.
- Keep an up-to-date list of all members and nonmembers of the unit.

## Treasurer Do's

- ✓ Refer to the **MEA Local Treasurers Handbook**. To obtain a copy, go to [www.mea.org/finance/treasurers/treasurers-handbook.pdf](http://www.mea.org/finance/treasurers/treasurers-handbook.pdf)
- ✓ Make sure that the assets of the association are safeguarded and used solely for the benefit of members.
- ✓ Adopt a budget prior to the start of the fiscal year.
- ✓ Compare budget to actual expenses on a monthly basis.
- ✓ Identify and explain differences between budget and actual expenses and plan accordingly.
- ✓ Prepare and present complete and accurate financial statements to the board of directors on a monthly basis.
- ✓ Make timely deposits. Keep detailed records of all deposit transactions.
- ✓ Remit the MEA/NEA membership dues on time in accordance with the dues transmittal agreement.
- ✓ Have proper supporting written documentation (invoices, receipts, approved minutes, etc.) for every check written or wire transfer made. Make sure every disbursement is authorized.
- ✓ Require two signatures for every check written.
- ✓ Reconcile bank accounts monthly.

- ✓ Have an internal audit committee review the financial records on at least a yearly basis. Have an annual audit or review by a CPA if your internal policies require it.
- ✓ Comply with federal and state laws with respect to tax-exempt status. When in doubt, contact your accountant or the MEA secretary-treasurer, 800-292-1934. Association funds should only be used for the exempt purpose.
- ✓ File all federal and state reports on time including IRS for 990, 1099s, payroll tax reports, etc.
- ✓ Formally adopt and implement policies regarding conflicts of interest, code of ethics, document retention, travel reimbursement policies, check signing authority, financial reporting, and financial and operating standards.

## Treasurer Don'ts

- ✗ Give out members' personal information (Social Security number, home address, email address, etc.).
- ✗ Spend MEA/NEA dues for local association activities. The local association is a trustee of these funds and is not entitled to use them.
- ✗ Conduct transactions for "private inurement" (for the benefit of an insider).
- ✗ Deposit association funds into personal bank accounts.
- ✗ Accept post-dated checks.
- ✗ Spend funds for activities not approved by the membership.
- ✗ Write checks for "cash."
- ✗ Sign blank checks (missing payee or amount).
- ✗ Sign checks payable to yourself.
- ✗ Withdraw cash from the association's bank accounts.
- ✗ Pay bills from statements. Require vendors to provide an original invoice. Be careful of copies and faxes to avoid duplicate payment.
- ✗ Use a bank or credit union that does not send the cancelled checks (or at least a copy) back to the association.
- ✗ Comingle PAC funds with the association's general funds.
- ✗ Destroy association records until after the retention timeline has passed.

## The Committee Chairperson

### You can't do it all alone!

As a union officer, you will quickly realize that you cannot do all of the work by yourself. Forming some standing association committees led by committed volunteers will not only help you manage your work load, but will allow more members to become involved with their association. Standing committees that you may want to form include:

- Communications/public relations
- Crisis
- Political action
- Grievance
- Elections

The key to any successful committee is a dedicated, organized and enthusiastic committee chairperson who knows how to be a team player, as well as a leader. Committees work better if they operate democratically, with democratic leadership and with members sharing in making and carrying out decisions. A good chairperson is one who:

- Encourages and embraces new ideas.
- Recognizes and utilizes the strengths of all committee members.
- Has a good sense of humor.
- Is committed to serving members through the work of the committee.
- Is comfortable and confident in a leadership role.
- Has a good understanding of the committee and its goals.

There are many MEA publications, resources and trainings designed to provide committee chairpeople with the information and skills they need to successfully lead their committees and accomplish the goals of their committees. Find out more by going to [www.mea.org](http://www.mea.org), for Leaders, Building Full Capacity Locals (BFCL).

## Conducting a Business Meeting

Experienced local presidents say that the best-run meetings are those that are well-planned in advance. You should develop an agenda and send it out ahead of time along with minutes from the last meeting and any other materials that might be helpful to have ahead of time. Good meetings start on time, end on time and do not get bogged down in the middle. Utilizing Robert's Rules of Order will help to ensure that your meeting runs smoothly and that all have the opportunity to be heard.

### The basics

- The president never takes sides, but should act as a moderator seeing that all issues are fairly debated. Do not use the meeting as your personal "bully pulpit."
- All members are equal: in rights, privileges and duties.
- Order must be preserved.
- Members must be courteous in their remarks and actions.
- Members are free to express their opinions, even if they are in a minority in their views.
- Business must be conducted efficiently and within a reasonable amount of time.
- Justice must be done to all by giving them an opportunity to speak and vote.
- Give everyone wishing to speak the opportunity to do so before calling on the same person twice.
- The president never makes a motion nor debates from the chair without first having appointed someone (the vice president) to preside over the meeting. The person appointed presides over the meeting until the vote has been announced.

### Parliamentary procedures for local presidents

The following is a sample agenda you may want to use when you have association board meetings.

#### I. Meeting called to order

The president calls the meeting to order and makes the opening remarks.

*"The meeting will come to order." (Opening remarks)*

#### II. Roll call, if necessary

#### III. Approval of the minutes

Send out advance copies of the minutes so that all have a chance to look them over prior to the meeting.

Request any corrections to the minutes.

*"Are there any corrections to the minutes?"*

*"If there are no (further) corrections, the minutes stand approved as read (as corrected)."*

#### IV. Treasurer's Report

No motion is needed to receive the treasurer's report unless the report is audited.

*"We will have (name) give the treasurer's report."*

*"Are there any questions or observations? If not, the treasurer's report will be received."*

## V. Reports of officers

### VI. Reports of committees

Committee chairpersons who are to report should sit up front.

No motion is needed for adoption of committee reports unless recommendations for association action are made. (See VII.)

*"We will have the report of the (name) committee given by (name)."*

*"Are there any questions or discussion in regard to this committee's report?" If not, the report to the committee stands.*

### VII. Committee recommendations for action

A motion to adopt is usually made by the committee chairperson and seconded by a committee member.

*"The (name) committee recommends that the association..."*

*"Is there any discussion?"*

Each motion is discussed and disposed of before another main motion can be proposed.

The same procedure can be followed for any motion that is made during the meeting.

*"Is there any new business?" \**

### VIII. Unfinished business (old business)

Unfinished business from the last meeting is brought to the floor for action.

*"Is there any unfinished business?" \**

### IX. New business

*"Is there any new business?" \**

### X. Other items for discussion or program (if any) \*

### XI. Announcements

*"Are there any announcements?"*

### XII. Adjournment

The president automatically adjourns the meeting, except when there is unfinished business. Then a motion for adjournment must be made and voted on.

*"If there is no further business, the meeting will stand adjourned."* (Gavel tap.)

\* *"Is there a motion?"*  
*"Is there a second?"*  
*"Is there any discussion on the motion?"*  
*"All those in favor of the motion say yes."*  
*"All those opposed of the motion say no."*  
*"Are there any abstentions?"*  
*"The motion passes/fails."*

# Most Frequently Used Parliamentary Motions

When in doubt about proper parliamentary procedure, use your common sense to clear up problems and continue business.

MOTIONS	PURPOSE	NEED A SECOND	AMENDABLE	DEBATABLE	VOTE REQUIRED	SUBSIDIARY MOTIONS CAN BE APPLIED	MAY INTERRUPT A SPEAKER
I. PRINCIPAL MOTION							
<b>1. A main motion</b>	<b>To introduce business</b>	<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>MAJORITY</b>	<b>YES</b>	<b>NO</b>
II. SUBSIDIARY MOTION							
2. To postpone indefinitely	To suppress action	YES	NO	YES	MAJORITY	YES	NO
<b>3. To amend or substitute</b>	<b>To modify a motion</b>	<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>MAJORITY</b>	<b>YES</b>	<b>NO</b>
4. To amend an amendment	To modify a motion	YES	NO	YES	MAJORITY	YES	NO
5. To refer to a committee	To modify a motion	YES	YES	YES	MAJORITY	YES	
6. To postpone to certain time	To defer action	YES	YES	YES	MAJORITY	YES	NO
<b>7. To limit or extend limits of debate</b>	<b>To modify freedom of debate</b>	<b>YES</b>	<b>YES</b>	<b>NO</b>	<b>TWO-THIRDS</b>	<b>YES</b>	<b>NO</b>
<b>8. To call for the previous question</b>	<b>To force into immediate vote</b>	<b>YES</b>	<b>NO</b>	<b>NO</b>	<b>TWO-THIRDS</b>	<b>NO</b>	<b>NO</b>

## Tips on Dealing with Administrators/Supervisors

As a union officer, you have an obligation to represent members at meetings with administrators (and others in supervisory roles) when requested to do so by a member. An administrator may also request your presence at a conference with a member. Whenever you meet with an administrator as a member advocate, you should always keep the following in mind:

- **Never humble yourself—you are an equal party.**
- **Develop a strategy for every meeting.**
- **Don't be argumentative.**
- **Don't make deals immediately—always take time to think it over!**
- **Keep notes of the meeting.**

## Important Contact Information

President's contact information:

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Vice President's contact information:

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Secretary's contact information:

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Treasurer's contact information:

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UniServ director's contact information:

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UniServ field assistant/office contact information:

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Coordinating council chairperson's contact information:

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## 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](http://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—we will 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.

### Important contact information:

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

Michigan Education Association

[www.mea.org](http://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.*

