

Guidelines for NEA UniServ in Michigan

Table of contents

Guidelines for NEA UniServ in Michigan.....	1
Appendix A — UniServ Glossary	5
Appendix B — Basic Unit.....	6
Appendix C — NEA/MEA UniServ Certificate for State Option Coordinating Councils.....	7
Appendix D — UniServ Certificate and Rebate Agreement for Local Option Coordinating Councils	8
Appendix E — Administrative Policies for NEA/MEA Participation in UniServ Local Unit Programs.....	10
Appendix F — UniServ Operating Guidelines for Coordinating Councils.....	11
Appendix G — The Origins of the Michigan UniServ Program.....	13

Guidelines for NEA UniServ in Michigan

(As amended by the Representative Assembly October 2014)

I. An effective level of service

- A. Locally elected leaders govern and guide the general local-state-national Association program and make policy decisions.
- B. Locally assigned and accountable professional staff provide direct administrative and consultative assistance for local elected leaders. Such assistance may include, but not be limited to:
 - 1. Leadership training programs dealing with Association operation, programs and member advocacy functions;
 - 2. Negotiation assistance;
 - 3. Local association evaluations aimed at program development;
 - 4. Organization of political efforts to achieve local legislative goals, e.g., millage campaigns, school board elections, political party primaries, etc.;
 - 5. Organization of bargaining units in school districts and colleges and universities where MEA is not the bargaining agent.
- C. The NEA and MEA Headquarters staff provide additional service to local units and members in good standing. Such services, where appropriate, may include, but not be limited to:
 - 1. State and national publications;
 - 2. Data processing—computer services;
 - 3. Statewide and national leadership training conferences;
 - 4. Legal services (negotiations and member rights cases);
 - 5. Research (negotiations, improvement of instruction, year-round schools, etc.);
 - 6. Lobbying at the state Legislature and the national Congress;
 - 7. Statewide and national negotiations planning and coordination;
 - 8. Member representation to other state and national agencies, the mass media and the public;
 - 9. Specialized consultant assistance in such areas as member education and professional standards, human relations and instructional improvement;
 - 10. Specialized service programs in the area of insurance and member economic benefits;
 - 11. Personnel matters related to staff, such as interviewing and screening details, payroll, insurance and other fringe benefit programs, filing state and federal tax reports, etc.

II. Financing of the UniServ program

- A. The UniServ program in Michigan is funded from United Education Profession (UEP) membership dues. The major sources of revenue are generated from MEA general membership dues fixed by the MEA Representative Assembly.
- B. Local option units may choose to receive cash payments to purchase services for MEA/NEA members locally or request the state Association to credit their account by direct payment for office rent, bonding, personnel pay and related areas to reduce their administrative burden.

III. Service unit coordinating councils

- A. Each Michigan UniServ service unit is governed by a body called a *coordinating council*. It is the administrative body for liaison with the state and national associations regarding staffing and office operations within the UniServ program.

B. Size of UniServ service units

1. Michigan's UniServ program is based on service units which may vary in size and composition from year to year as membership and available finances dictate.
2. Every effort will be made to provide an equitable staff-member ratio. If membership or number of locals causes inequities in service, then an action program will be formulated to resolve those inequities.
3. Guidelines for composition of UniServ councils will be based on:
 - a. The number of members in good standing served;
 - b. The number of school districts/campuses served;
 - c. The number of bargaining units served;
 - d. Geography and the number of miles to be driven by staff and leaders;
 - e. Teacher and support staff bargaining units from the same school district or college/university will be serviced from the same council;
 - f. Where possible, coordinating council boundaries and *multiple association bargaining organization (MABO)* boundaries will not conflict.

C. The Local Affiliates Commission shall review service unit composition and make recommendations to the Board of Directors by November 15 of odd-numbered years.

D. The Local Affiliates Commission, in consultation with regions and coordinating councils, shall recommend to the MEA Board of Directors the composition of each UniServ service unit contained therein. Because the MEA Board of Directors is responsible for budget preparation and recommendation, it shall be responsible for determining the size and composition of UniServ service units.

E. Service units—change in status

1. Local option coordinating councils may petition the MEA Board of Directors to be designated as a state service unit or a state option coordinating council may petition the MEA Board of Directors to be designated as a local option service unit effective at the beginning of the subsequent fiscal year, provided that such a petition: (*April 2011*)
 - a. Guarantees due process to all staff involved;
 - b. Is not in violation of the then-current staff master agreements;
 - c. Meets the minimum standards of MEA/NEA.
2. Each petitioning UniServ coordinating council shall determine, by majority vote of the membership in good standing in each local of the coordinating council, designation as a state service unit or local option. A petition will be considered upon evidence that it is acceptable to all units involved. (*April 2011*)

F. Representation on multi-unit coordinating councils

Representation on coordinating councils should be apportioned according to the following formula:

1. Each local unit in the service unit shall be entitled to one (1) representative with one (1) vote.
2. Districts shall be entitled to additional representatives as follows:
 - a. One (1) additional representative and vote for each two hundred (200) active and life members in good standing and/or major fraction thereof based upon membership (previous December 31);
 - b. Members of local units are to be represented through their local unit and not their county district or multi-unit district. Duplication of representation is to be avoided.

G. Functions of UniServ service unit coordinating councils

1. Approve UniServ director's assignment.
2. Provide for scheduled review and assist in the evaluation of professional staff services.
3. Determine jointly with staff priorities of local professional staff activity.
4. Develop a program of leadership development and training at the appropriate level.

5. Coordinate the activities of members in negotiations, public affairs and related activities.
6. Establish program criteria which the local association may use for self-evaluation.
7. Assist local associations in the development of their budget and programs.
8. Receive a regular report from their UniServ director.
9. Provide for a newsletter to all members located therein.
10. Work with the zone director to coordinate UEP activities at the local, state and national levels.

IV. UniServ supervisory structure

The UniServ program requires provisions for the management, coordination, supervision, evaluation and development of UniServ personnel. The MEA UniServ associate executive director is the chief administrator of the UniServ program.

V. Staff relationships

- A. In program development, the relationship between staff and member leaders shall be as follows:
 1. Member leaders identify action programs;
 2. Staff classifies alternatives and develops pros and cons of each and makes recommendations upon request;
 3. Member leaders review and accept, modify or reject staff recommendations;
 4. Staff, within prescribed guidelines of authority and policy, implements the action program.
- B. *Staff relationship to internal politics*
 1. UniServ staff shall provide whatever assistance is deemed necessary by the local and state Association elected leadership to meet the needs of the membership. Further, all UniServ staff are to implement a policy of noninterference in the internal political affairs of local and state associations.
 2. A UniServ employee shall not engage in activities on behalf of any organization which is in competition with the MEA/NEA or any of its affiliates for members and/or negotiating rights.

VI. UniServ personnel practices

- A. State Association personnel are employed under terms of collective bargaining contracts between the state Association and the employee unions.
- B. Local option UniServ directors are employed under the terms of a contract negotiated by the joint employers, MEA and local option coordinating councils and the *Michigan Executive Directors Association (MEDA)*, as well as under individual contracts negotiated between themselves and their local coordinating council.
- C. Specific elements and obligations of the parties involved are set forth in these agreements.
- D. All UniServ units shall be equal opportunity employers as defined in the MEA Affirmative Action Program and the NEA UniServ Employment Practices Guidelines.
- E. If the coordinating councils involved in a split UniServ director assignment fail to agree on a mutually acceptable voting procedure for hiring, approval of the assignment of the UniServ director must be by not less than a majority of the representation of each of the councils present and voting.

VII. Final authority for UniServ policy determination

The MEA Representative Assembly is the final authority for all UniServ policy determinations.

UniServ Glossary

UniServ is a program of the National Education Association to provide expanded staff services to its members and local affiliates. The word *UniServ* is an acronym formed from the words *Unified Service*. A portion of every NEA member's dues is used to help fund an office and staff to assist the member's efforts to improve education and solve his or her professional problems. The state and/or local associations co-fund the remaining staff and office costs.

Service unit is a cluster of local associations or a single association of NEA/MEA members. These associations have been grouped together in combinations approved by the MEA Board of Directors after review by the Local Affiliates Commission. The grouping is intended to provide for coordination of programs and services.

Coordinating council is a group of locally elected delegates representing the locals in a given service unit. A council's tasks include assisting in the selection of a professional staff person, coordinating services by establishing service priorities, and evaluating the quality of the services rendered.

Local option service units are those service units that employ a UniServ director pursuant to the collective bargaining agreement between the joint employers (MEA and the local option councils) and MEDA (Michigan Executive Directors Association) and that choose to maintain administrative responsibilities. Local option service units execute a local option rebate with the MEA annually (*see Appendix D*).

State option service units are those service units that select and have UniServ directors assigned pursuant to the collective bargaining agreement between the MEA and the *Professional Staff Association (PSA)* as well as MEA employment policies.

UniServ director is the title describing a UniServ professional staff who works with a service unit and coordinating council composed of one (1) or more local associations.

Region is one of the seventeen (17) political subdivisions of the Michigan Education Association.

Mid-Eastern: Regions 2, 6, 7, 8, (except 8-C)

North-Central: 8-C Coordinating Council & Regions 10, 11, 12, 14, 15, 16, 17, 18

South-Western: Regions 3, 4, 5, 9, 13 (2018)

Multiple association bargaining organization (MABO) is an organization resulting from a combination of more than one (1) bargaining unit, formed to facilitate more effective local negotiating and contract maintenance assistance. Each of the various models in the state has some unique features.

Zone director is the chief administrative officer in each zone and is assigned to the zone to supervise and coordinate programs and staff. Each zone director reports to the UniServ executive director.

MEA executive director is the chief administrative officer of the Michigan Education Association and is held responsible by the NEA for the total implementation of UniServ in Michigan.

Basic Unit

The basic UniServ unit *package* includes:

- A. The salary of one (1) full-time UniServ director;
- B. Field assistant services on a continuing basis;
- C. Office space;
- D. Capital outlay for office equipment and maintenance;
- E. Office operation costs (such as supplies, postage, telephone, bonding, insurance, printing, taxes, etc.);
- F. Appropriate personnel costs (employee costs such as FICA and unemployment compensation, as well as staff fringe benefits);
- G. Financial assistance to assist UniServ coordinating councils in their management functions of the UniServ service unit.

**NEA/MEA UniServ Certificate
for State Option Coordinating Councils**

Fiscal Year _____

This is to certify for the records of the Michigan Education Association (hereinafter referred to as MEA) and the National Education Association (hereinafter referred to as NEA) that _____ *(Name of coordinating council)* is a constituent UniServ unit of the NEA UniServ in Michigan program and is operating under the provisions of the Guidelines for NEA UniServ in Michigan.

It is understood that funds for operating said coordinating council are shared in part by the NEA and MEA as stated in an *agreement* between the NEA and MEA and said agreement may be inspected by interested parties at the Headquarters of the Michigan Education Association.

The NEA/MEA agree to assist in supplying direct professional organizational services to said coordinating council. Said services include professional staff, secretarial services, office rental equipment, supplies, and travel and expenses. For the above services, said coordinating council agrees to abide by the provisions of the Guidelines for NEA UniServ in Michigan as well as the constitutions, bylaws and administrative policies of the NEA and MEA.

It is expressly understood by both parties that violations of the above provisions, as determined by the MEA Board of Reference, may result in reduction of UniServ services and/or rebate subsidy.

Chairperson of coordinating council

Date

MEA associate executive director/UniServ

Date

NEA/MEA UniServ Certificate and Rebate Agreement for Local Option Coordinating Councils

Fiscal Year _____

This is to certify for the records of the Michigan Education Association (hereinafter referred to as MEA) and the National Education Association (hereinafter referred to as NEA) that _____ (*Name of coordinating council*) is a constituent UniServ unit of the NEA UniServ in Michigan program and is operating under the provisions of the Guidelines for NEA UniServ in Michigan.

It is understood that funds for operating said coordinating council are shared in part by the NEA and MEA as stated in an *agreement* between the NEA and MEA and said agreement may be inspected by interested parties at the Headquarters of the Michigan Education Association.

The NEA/MEA agree to assist in supplying direct professional organizational services to said coordinating council. Said services include professional staff, field assistant services, office rental equipment, supplies, and travel and expenses. For the above services, said coordinating council agrees to abide by the provisions of the Guidelines for NEA UniServ in Michigan as well as the constitutions, bylaws and administrative policies of the NEA and MEA.

It is expressly understood by both parties that violations of the above provisions, as determined by the MEA Board of Reference, may result in reduction of UniServ services and/or rebate subsidy.

The Michigan Education Association (MEA) and the National Education Association (NEA) agree to pay to the above local option coordinating council monies to assist in supplying direct professional organizational services for their members. Said services include subsidies for:

- I. **Professional employee(s).** Total rebate from NEA/MEA will be the costs for staff placement of _____ person(s) on the Michigan Executive Directors Association (MEDA) schedule, with service credit as defined in the current MEDA contract. In addition, all fringe benefits as specified in the same MEDA contract will be provided to the staff. Workers compensation insurance, unemployment insurance and FICA will be provided at levels required by law.
- II. **Field assistant employee(s).** Total rebate from NEA/MEA will be the costs for staff placement of _____ person(s) on the United Staff Organization (USO) schedule, with service credit as defined in the current USO contract. In addition, all fringe benefits as specified in the same USO contract will be provided to the staff. Workers compensation insurance, unemployment insurance and FICA will be provided at levels required by law.
- III. In no case will the total rebate for salary and fringes as called for in paragraphs I and II above, provided those positions are occupied by the respective staff, be less than a full twelve (12) months rebate.
- IV. **Office rent, utilities and maintenance.** Rent, utilities and maintenance will be paid or reimbursed for actual costs as specified in a continuing lease on file with MEA or as approved by the zone director.
- V. **Travel and expenses.** Reimbursement will be at the rate of \$ _____ for a twelve-month (12-month) year per professional staff.
- VI. **Telephone service.** Payment or reimbursement will be made for actual costs, as indicated on monthly bills reviewed by the zone director, for one (1) line per staff specified in I and II above plus necessary long-distance calls.
- VII. **Capital outlay.** UniServ office basic equipment and furniture shall be purchased and/or replaced upon prior approval and receipt of invoice by the zone director.
- VIII. **Supplies.** \$ _____ will be reimbursed (at the rate established by the RA) and MEA shall provide for machine maintenance for MEA-owned equipment plus all theft, fire and liability insurance, personal property taxes and bonding for up to three (3) people per UniServ unit.
- IX. **Special conditions**
 - A. To be adjusted, up or down, in the event of realignment of the UniServ structure per the directives stated in the UniServ guidelines.
 - B. If the wages or benefits which the coordinating council pays to its employees exceed the costs provided for in the collective bargaining agreements mentioned in paragraphs I and II of this agreement, those costs shall not be rebated from the MEA but shall be the sole costs of the coordinating council.

C. Other

Chairperson of coordinating council

Date

MEA associate executive director/UniServ

Date

**Administrative Policies for NEA/MEA Participation
in UniServ Local Option Service Unit Programs**

1. The local service unit coordinating council shall annually review and evaluate the coordinating council constitution, budget and program. Upon request, the NEA/MEA will assist in this process.
2. As a part of the subsidy for materials and supplies, the NEA/MEA shall provide the necessary bonding for three (3) positions responsible for the financial affairs of the local service unit coordinating council.
3. The NEA/MEA local association will mutually support and implement the objectives and program of action of the United Education Profession.
4. The UniServ director may, upon request, accept special assignments with the MEA and/or NEA with the approval of the local coordinating council or its chairperson. The NEA/MEA will absorb all expenses incurred by the UniServ director in the fulfillment of such special assignments.
5. The NEA/MEA will transmit to the local service unit, on a quarterly basis, on October 10, January 10, April 10 and July 10, such monies as have been contracted by the NEA/MEA and said local service unit.
6. The local service unit's UniServ director expense account shall be the responsibility of the local service unit. In the event that expenses exceed the agreed-upon amount, the NEA/MEA may reimburse the local service unit upon its request, such request to be submitted to the appropriate zone director.
7. In the interest of better communication and to facilitate local-state-national working relationships, the local UniServ director shall be expected to attend meetings of the MEA UniServ Division and the professional staff, when such attendance does not conflict with the UniServ director's duties and responsibilities to the local service unit.
8. The local service unit coordinating council shall assure the NEA/MEA that the coordinating council constitution(s) and/or bylaws provide for the UniServ director position, locating adequate authority in an employing body.
9. The UniServ director shall meet periodically with the MEA executive director or designee.
10. The MEA executive director, or designee, shall upon request assist in the screening and selection procedure. Such assistance may include locating and screening prospects, providing interviewing techniques and materials, publicizing vacancies, checking references and seeking legal review of a tentative contract.
11. The employment of staff by a local service unit coordinating council shall not relieve the NEA/MEA of liability obligations or responsibilities while the local staff is on special assignment to NEA/MEA.
12. A memorandum of agreement as set forth in Appendix D shall be drawn between the MEA UniServ Division and the local service unit coordinating council to implement the provisions of these administrative policies.
13. The MEA UniServ Division shall, upon request, assist the local service unit coordinating council in developing contracts with its staff.
14. These administrative policies shall be reviewed periodically by the Local Affiliates Commission and the local service unit coordinating council.

UniServ Operating Guidelines for Coordinating Councils

The *coordinating councils* are intended to serve as administrative bodies to coordinate services to members within a given service unit and to represent those members on a day-to-day basis in matters relating to the selection, guidance and evaluation of UniServ staff. The councils are separate from the policy-making structure which flows from the local association through the region council to the Michigan Education Association Board of Directors and Representative Assembly and to the policy-making structure of the National Education Association. All members of UniServ coordinating councils shall be members in good standing and have a responsibility to effectively represent their constituents, seek their guidance and keep them well-informed concerning issues facing the coordinating council.

Topic	Recommendation	Notes
1. Definition of membership	Delegates to coordinating councils should be elected by the membership in good standing as officers by special election or should be appointed by the president with said appointments being approved by a duly constituted legislative or executive body of the local association.	Delegates must come to the council with the authority to make decisions for the local association and must have local credibility.
	Delegates to coordinating councils should be provided for in local association constitutions. Provisions should be made for regular reporting by delegates back to the local association.	It is recommended that the local president serve as the local's first delegate to the coordinating council.
	If a local association chooses to select alternates for delegates back to the local association.	
2. Officers and general organization	a. The officers should be a chairperson, vice chairperson and a secretary-treasurer.	Title of chairperson is preferred to that of president to avoid confusion with the role in the local association.
	b. The council may establish whatever committees it deems necessary to conduct its business, and, in general, organize itself.	
	c. Officers are to be elected from and by the council. Operating policies should specify the term of office, time of election and date or condition of assumption of office.	
3. Quorum definition	The definition of a quorum should utilize either the number of delegates present or the number of local associations present or both.	Because the actions of the council should be based on equity, the quorum needs to be established; the need for action, however, seems to dictate more than one way to define such equity.
4. Voting procedures	The voting procedures should take into consideration either the number of delegates present or the number of local associations present or both.	While every effort should be made to obtain broad support for an issue at vote, the council may find it helpful to allow decisions to be made by more than one route.
5. Calendar	The council should plan on regular and periodic meetings at intervals dictated by circumstances facing the staff or council. Provisions should be made for special meetings as needed.	While most councils will probably want to meet once per month, some may decide to meet more or less often than that. Meetings may need to be more frequent in the initial stages. Councils will need to consider regional council dates, etc.

Topic	Recommendation	Notes
6. Council duties and functions	The duties of the council shall be to implement the functions set forth in the UniServ program. (<i>Section III. G.</i>)	The functions of the council, in essence, are aimed at setting the priorities of service for the given service unit. Communication with the constituent locals and evaluating staff in light of a written job description are two of the more important functions.
7. Authority and responsibility of council chairperson	The role of the council chairperson should be defined, including voting rights, authority to speak for the council, etc.	The UniServ program allows the UniServ director to be given special assignments of one (1) or two (2) days' duration in a given month. Special assignments of three (3) or more days must be approved by the council. In times of crises, it is not feasible to call the entire council together.
8. Relationship of staff to council, council to staff	The council's expectations of the staff should be clearly presented and be in keeping with pertinent personnel employment contracts. A general outline of staff responsibilities to the council is presented in the UniServ program. (<i>Section V. A.</i>)	This element of the operating procedures may develop with experience. There are several factors to be considered, such as membership needs and the extent to which they are met, the staff union contracts, the role of the UniServ zone director, etc.
9. Coordinating council funding	<p>Local associations in a coordinating council may fund the coordinating council expenses.</p> <p>In cases where the local associations are unable to fund their coordinating council expenses, the region council may provide funds. Sources of such funds could be the MEA region subsidy or funds made available through the reallocation of current region revenues.</p> <p>The region council may levy region-wide dues for the purpose of funding coordinating council expenses.</p> <p>Coordinating councils may receive dues or assessments by the consent of the constituent unit for the purpose of funding coordinating council expenses.</p>	

The Origins of the Michigan UniServ Program

In 1969 various members of the Local Affiliates Commission and MEA staff reviewed many of the problems facing Michigan teachers and their unified association. Th efforts to resolve these problems and the increasing demands for service by teachers pointed to a need for a new statewide plan for service to the unified membership--one which would incorporate services by the local, MEA and NEA. It was apparent that if the MEA/NEA programs were to be effective, teachers would have to be organized into strong local associations which would receive effective services in a unified program.

A plan was organized in 1970 to intensify the interaction of the national-state-local association. One of the first steps was to mobilize to meet the need for increased services to the membership and to meet the challenge of teacher influence. The program had to expand the number of trained staff to provide the needed services to the membership in such a way as to provide equity in the financial contributions made by individual members of the United Education Profession in Michigan.

The program was designed to provide full-time staff assistance to the elected Association leaders.

A massive equity effort was needed since all teachers, regardless of location, had similar needs as well as legitimate expectations from MEA/NEA. In April 1970, the MEA Spring Representative Assembly established and funded the Michigan plan for implementing NEA UniServ. At this time, UniServ was known as the *Massive Staffing Proposal*. Following action by the Michigan Representative Assembly, the NEA, at its annual convention in San Francisco in July, voted to establish a nationwide staffing proposal, established the term UniServ, and Michigan became the first major state program in the nation.

The UniServ program then became the responsibility of the MEA Board of Directors and the executive director to activate in an equitable pattern across Michigan. The goal was to achieve approximately one full-time staff employee per 800-1300 members by September 1, 1971.

The program is now in full operation under the direction of the MEA Executive Director.

NOTE: Although the MEA now represents a wide variety of school employee classifications, when UniServ was formed in 1970, the principal members were teachers, thus the reference to teachers in the above explanation.