

## Section 1: Accessing Support and Providing Strategic Leadership

- Become familiar with how your local fits into the structure of the Association (district, state, national) and how to access resources and support in your work with members.
- Ensure the local is represented at OEA UniServ Leadership Council meetings.
- Utilize the support of the OEA Labor Relations Consultant in organizing your local for growth and strength.
- Provide a structure for understanding and responding to member concerns.
- Work with your Labor Relations Consultant to conduct a Local Self-Assessment and create a Local Development Plan.
- Guide local leadership in making decisions related to your local's direction, policies and programs.
- Become familiar with your local's Constitution and Bylaws.
- Review your Constitution and Bylaws every five (5) years for compliance with OEA and NEA affiliation requirements.

# Planning Ahead: Key Dates for Local Presidents

## August

- Request new hire information from district office
- Write a president's welcome letter for members returning back to school
- Plan for the OEA Fund Drive
- Check with your local treasurer to ensure all membership enrollment materials have been received
- Notify OEA field office to report any local officer or leader changes (now or anytime there are changes)
- Conduct Back-to-School Activities, including ensuring an Association presence at New Employee Orientations and other Membership Recruitment events
- Review and Development of Local Development Plan

## September

- Update email and other contact lists, including Worksite Representatives
- Develop a list of all potential members. Include contact information and worksites
- Conduct fundraising drive for the OEA Fund (unless your local has already had a drive in the spring or earlier in the fall)
- Attend Bargaining Boot Camps (numerous locations in various OEA regions throughout the fall)
- Send Election Notice to All Members

30 Completed Dues Transmittal Agreement must be signed and mailed to OEA  
(check with your local treasurer on this)

## October

- 10 Deadline for Conducting Local Election for Delegates to the OEA Representative Assembly
- 15 Deadline for Receipt of Local Delegate Election Results by OEA
- 15 Corrections to Continuous Membership Roster, enrollment and renewal forms due to OEA

## November

- Local School Board Elections (odd years)
- Fall District Representative Assemblies (dates and locations vary)

## December

1st Saturday OEA Fall Representative Assembly

## January

- OEA Affiliate Grant Applications due (watch for details on specific deadlines each year)
  - OEA Awards and Scholarships nominations due
- 15 Deadline for submitting tax filing to IRS (Form 990/990 EZ or 990 N e-postcard) for locals with 9/1 to 8/31 fiscal year (Check with your treasurer on this, and be sure verification is sent to OEA as well)
- 31 Deadline for Submitting Declaration of Candidacy Forms for State At-Large Delegates to the NEA Representative Assembly
- 31 Fiscal Fitness Award application due to OEA Secretary-Treasurer's office

## February

- Begin preparation for a Membership Early Enrollment Campaign if necessary
- OEA Advocacy and Organizing Institute, Columbus (typically late January or early February)

## March

- Conduct Election for Local Delegates and, when necessary, State At-Large Delegates to the NEA Representative Assembly
- NEA Leadership Summit (locations vary) – look for details on scholarship opportunities

## April

- Begin preparations for Back-to-School membership campaigns
- Spring District Representative Assemblies (dates and locations vary)
- 10 Deadline for Submission of Election Results for NEA Local Delegates

## May

- OEA Spring Representative Assembly, Columbus (typically 2nd Friday and Saturday)

## June

- Update rosters of members and non-members, including those who have resigned or retired
- OEA Summer Leadership Academy (typically mid-month)
- Local Presidents' Training (watch for announcements on dates and locations)
- Start looking for Membership materials for the upcoming school year and planning for Back-to-School Membership Recruitment and Engagement activities

## July

- Hold membership/back-to-school organizing training with local leaders
- NEA Representative Assembly (traditionally first week of July, over the Independence Day holiday) —Location Varies
- OEA Minority Leadership Training, Columbus (watch announcements for details)
- Planning for Membership
- Encourage Local Treasurers to attend Treasurers Training Workshop

## Ongoing

- Conduct local Executive Board/Building Rep Meetings (monthly, or as stipulated in your Constitution and Bylaws)
- Attend or delegate other members to attend School Board Meetings (often twice per month)
- Attend or delegate other members to attend OEA UniServ Leadership Council Meetings (typically four times per year)
- Participate in Professional Development and Leadership Training Opportunities hosted by OEA and OEA Districts
- Update names and contact information of all bargaining unit members and non-members.

# OEA Strategic Priorities, Mission, Vision and Core Values

## Strategic Priorities

1. Build OEA and locals' capacity to be more relevant to members
2. Educate and organize members to build support for quality public education
3. Build OEA as a member resource for professional issues
4. Educate and organize OEA and its members to advocate for racial, social, and economic justice

## OEA Mission

The OEA will lead the way for continuous improvement of public education while advocating for members and the learners they serve.

## OEA Vision

The Ohio Education Association is the hallmark for excellence in education.

## OEA Core Values

These principles guide our work and define our mission.

### We believe in:

#### **Democracy.**

The foundation of a strong democracy is high quality public education, which is essential for an educated citizenry.

#### **Collective Action.**

When we unite as one voice, we are strong advocates for learners and our profession.

#### **Fairness.**

A high quality education, accessible to all, promotes a fair and just society.

#### **Inclusion.**

We respect and embrace the diversity of all communities.

#### **Integrity.**

By holding ourselves to the highest standards, we promote good citizenship and maintain the public trust.

#### **Professionalism.**

Professional judgment and expertise of educators are critical to student success. Educators deserve the status, compensation and respect due all professionals.

# Contacts and Additional Resources

Use this resource as a guide to contact the right department with your questions.

<b>OEA Membership</b>	
Want to Email us?	<i>membership@ohea.org</i>
Want to call us?	Call InfoOEA at 1-844-632-4636.
Looking for treasurer training workshops which are held June to August?	Access the following link on the OEA Website: <b><a href="https://www.ohea.org/resources/affiliate-resources/treasurer-workshops/">https://www.ohea.org/resources/affiliate-resources/treasurer-workshops/</a></b>
Want to schedule individual treasurer training?	Contact OEA Secretary/Treasurer at 1-800-282-1500 ext. 3199 or 614-227-3199.
Questions about lost membership cards; changes in address, phone numbers and email addresses; change in employment status, additional membership forms?  Where can I mail dues payments, Membership Update Forms and membership enrollment materials?	Contact InfoOEA at <b>1-844-632-4636</b>  OEA Membership Department 225 E. Broad St. P. O. Box 2550 Columbus, OH 43216
Need to update member contact and certification information?	Visit <b>www.ohea.org</b> and login. Select “Member Center” then “Member update form”, or email <i>membership@ohea.org</i>

## OEA Computer Services Department

Experiencing problems signing on to the OEA website ( <a href="http://www.ohea.org">www.ohea.org</a> – Member Login)?	Contact <i>webmaster@ohea.org</i> or 1-800-282-1500 X 3000
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## OEA Accounting Department

How do I obtain EIN (Employer Identification Number)?	IRS (Internal Revenue Service): 1-631-447-8960, <a href="http://www.irs.gov">www.irs.gov</a> or OEA: 1-800-282-1500 Extension 3017
Where do I obtain tax forms and file the annual 990 N e-postcard?	
Where do I obtain association checking account signature changes?	Contact your bank at _____ <i>(Insert your bank's number here.)</i>

## OEA Fund for Children and Public Education

*Where do I get information regarding reimbursement of PAC (Political Action Committee) Funds?*

*Government Relations Department  
govtsrv@ohea.org*

## NEA Member Benefits

*Want to learn more about the wide range of products and services exclusively for members and their families including life, disability, long term care, and property and casualty insurance; credit and loan programs; mortgages; savings and investment programs; discount programs; and professional resources including the NEA Academy?*

*Call 800-637-4636.*

*Visit [www.neamb.com](http://www.neamb.com)*

*Local contact: **Guy Kendall-Freas***

*Affiliate Relations Specialist  
OH/KY/WV Regional Office  
117 Monterey Dr.  
Mansfield, OH 44907*

*Toll free - 888-749-7380  
[Gkendall-freas@neamb.com](mailto:Gkendall-freas@neamb.com)*

# NEA's Vision, Mission, and Values

*Adopted at the 2006 NEA Representative Assembly*

## **The National Education Association**

We, the members of the National Education Association of the United States, are the voice of education professionals. Our work is fundamental to the nation, and we accept the profound trust placed in us.

### **Our Vision**

Our vision is a great public school for every student.

### **Our Mission**

Our mission is to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.

### **Our Core Values**

These principles guide our work and define our mission:

1. **Equal Opportunity.** We believe public education is the gateway to opportunity. All students have the human and civil right to a quality public education that develops their potential, independence, and character.
2. **A Just Society.** We believe public education is vital to building respect for the worth, dignity, and equality of every individual in our diverse society.
3. **Democracy.** We believe public education is the cornerstone of our republic. Public education provides individuals with the skills to be involved, informed, and engaged in our representative democracy.
4. **Professionalism.** We believe that the expertise and judgment of education professionals are critical to student success. We maintain the highest professional standards, and we expect the status, compensation, and respect due all professionals.
5. **Partnership.** We believe partnerships with parents, families, communities, and other stakeholders are essential to quality public education and student success.
6. **Collective Action.** We believe individuals are strengthened when they work together for the common good. As education professionals, we improve both our professional status and the quality of public education when we unite and advocate collectively.

NEA also believes every student in America, regardless of family income or place of residence, deserves a quality education. In pursuing its mission, NEA has determined that we will focus the energy and resources of our 3.2 million members on improving the quality of teaching, increasing student achievement and making schools safer, better places to learn.

# 2022-2023 NEA Strategic Framework

*Our mission is to advocate for education professionals and to unite our members and the nation to fulfill the promise of public education to prepare every student to succeed in a diverse and interdependent world.*

## Goal

To achieve our mission, we, the NEA, will grow and strengthen our Association to promote quality education by:

- **advancing opportunities** that will amplify the voices of all educators; identify, organize, and engage new and early career educators; support our members’ professional growth; and promote racial justice for our students, our communities, and our nation;
- **securing a pro-public education environment** for students, educators, and families; and
- **building the capacity of the local, state, and national union** to ensure the success of public education



## Strategic Objectives

To grow and strengthen our union, we will organize our members around issues that impact teaching and learning and the lives of our students. In partnership with our affiliates, NEA will:

**Increase Educator Voice, Influence, and Professional Authority:** Develop and sustain effective structures, processes, and leaders to increase educator influence in decision-making at worksite, district, state, and national levels.

**BC Member/Lead: James Frazier/Donna Harris-Aikens**

**Recruit and Engage New and Early Career Educators:** Identify, recruit, support, and engage new educators in our Association, and connect them with opportunities for professional learning, leadership, and advocacy.

**BC Member/Lead: Brenda Robinson/Jim Testerman**

**Support Professional Excellence:** Build a system of Association-convened, educator-led professional learning and supports for all educators across their career continua to ensure student success.

**BC Member/Lead: Amber Gould/Andy Coons**

**Advance Racial Justice in Education:** Support members in advancing racial justice in education and improving conditions for students, families, and communities through, awareness, capacity-building, partnership, and individual and collective action.

**BC Member/Lead: Gina Harris/Rocio Inclan**

**Secure a Pro-Public Education Environment:** Use all available means, including organizing, legal, legislative, electoral, and collective action, to secure the environment necessary to protect the rights of students and educators, and the future of public education.

**BC Member/Lead: Shannon McCann/Mary Kusler**

**Enhance Organizational Capacity:** Develop and leverage the collective organizational capacity across our Association that is necessary to advance the mission of the NEA and its affiliates, with particular focus on organizing, leadership development, fiscal health, technology, and internal and external partnerships.

**BC Member/Lead: Denise Specht/Ramona Oliver**

## Enterprise Operations

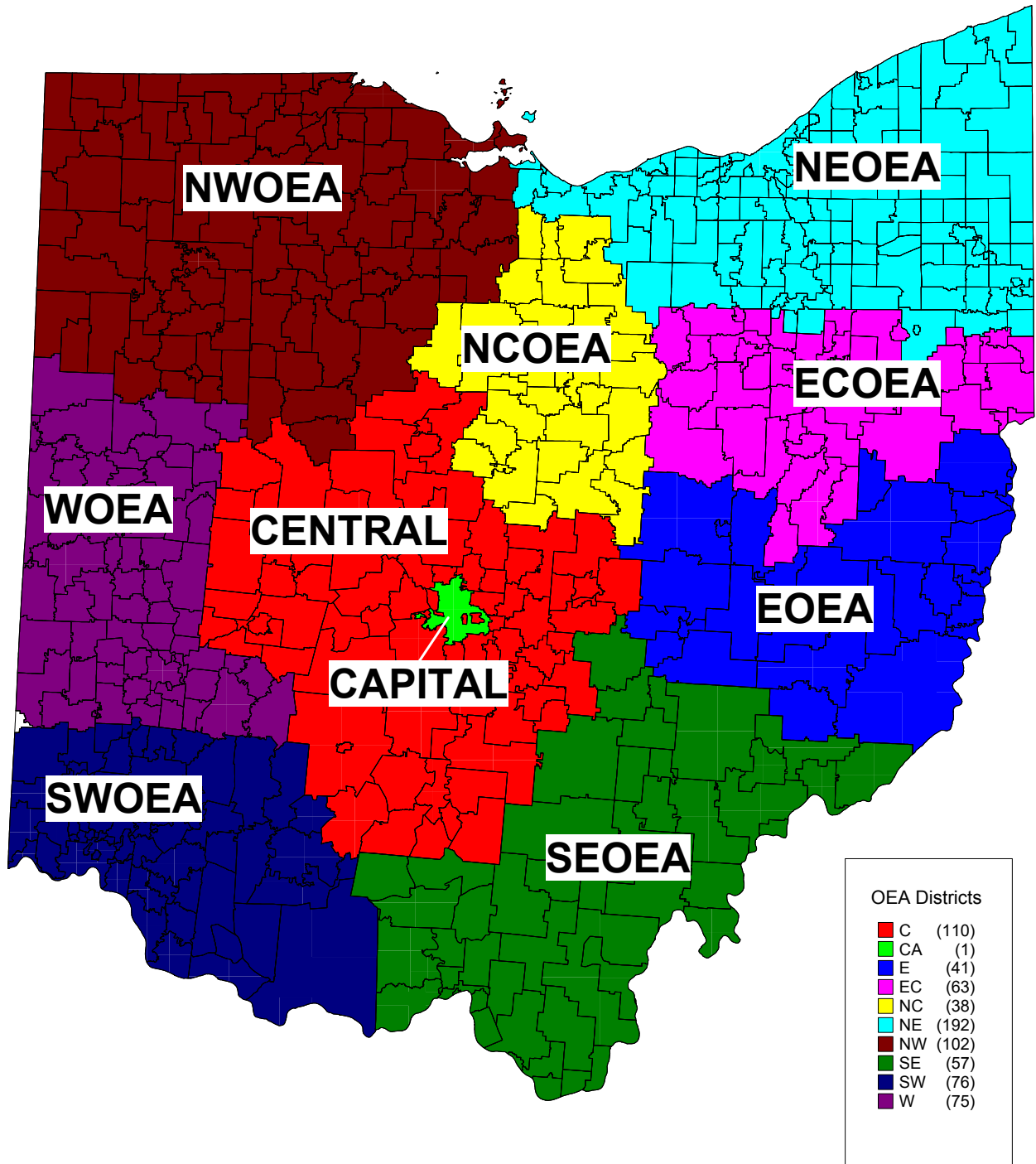
Ongoing functions across the enterprise that support the strategic objectives, build lasting strength, and sustain the organizational infrastructure.

**BC Member/Lead: Amber Gould/John Wright**





# OEA Districts



# OEA District Association Information

OEA's network of 10 district associations assures that Association decisions are made by representatives from all parts of the state. About two-thirds of the OEA Board of Directors is elected from units within the district associations. The number of units each district has depends on its total number of members. Each district association also has a representative on each OEA committee.

The districts serve as a liaison to the local associations from the OEA, providing professional development opportunities, legislative updates and networking for members.

Each district sends its three officers to the District Leaders Council (DLC) to represent their respective district and share information to and from the OEA. The DLC sponsors the District Leaders Hospitality Night for the delegates to the OEA Representative Assembly (RA), OEA's Got Talent Contest held during The OEA Summer Academy, and a Stay-to-the-End drawing at the NEA-RA.

*A map of the OEA Districts is on Page 15.*

## **Capital District inc.**

929 East Broad St.  
Columbus, OH 43205-1101  
614-253-4731  
[www.ceaohio.org/capital-district](http://www.ceaohio.org/capital-district)

## **Central OEA/NEA**

2760 Airport Dr. Suite 120B  
Columbus, OH 43219  
614-269-7255  
[www.centraloeanea.org](http://www.centraloeanea.org) and  
[www.jointhefuture.org](http://www.jointhefuture.org)

## **East Central Ohio Education Association (ECOEA)**

129 Easton St. NE, Suite 103  
Canton, OH 44721  
330-499-8587  
[www.ecoia.oea.us](http://www.ecoia.oea.us)

## **Eastern Ohio Education Association (EOEA)**

[www.eastern.oea.us](http://www.eastern.oea.us)

## **North Central Ohio Education Association (NCEOEA)**

[www.ncoea.oea.us](http://www.ncoea.oea.us)

## **North Eastern Ohio Education Association (NEOEA)**

6001 Landerhaven Dr., Suite D  
Mayfield Heights, OH 44124-4190  
216-518-0200  
[www.neoea.org](http://www.neoea.org)

## **Northwestern Ohio**

### **Education Association (NWOEA)**

101 W. Sandusky, Suite 302  
Findlay, OH 45840-3267  
419-424-1708  
[www.nwoea.oea.us](http://www.nwoea.oea.us)

## **Southeastern Ohio**

### **Education Association (SEOEA)**

[www.seoea.oea.us](http://www.seoea.oea.us)

## **Southwestern Ohio**

### **Education Association (SWOEA)**

270 Northland Blvd., Suite 224  
Cincinnati, OH 45246-3775  
513-771-3319 or 800-346-2175  
[www.swoea.com](http://www.swoea.com)

## **Western Ohio Education Association (WEOA)**

308 James E. Bohanan Memorial Drive, Vandalia, Ohio 45377  
937-387-9960  
[www.woea.org](http://www.woea.org)

# OEA Board Policy on Local Affiliates

*One of the most valuable resources you have as a local president is the support of your Labor Relations Consultant (LRC) and your UniServ Leadership Council. Every OEA local is assigned to a Council, which includes all the local affiliates supported by a given LRC. Below are the key components of OEA policy on those Councils, the support you are entitled to receive, the process for raising any service complaints, and the negotiated job description of the LRC.*

## OEA Board Policy Section 1200.001 – UNISERV LEADERSHIP COUNCILS

To ensure alignment with the Board of Directors' priorities, UniServ Leadership Councils (ULCs) are created and intended to support the UniServ Program as well as support the overall success of OEA and strategic priorities which may evolve over time. UniServ Leadership Councils are a means to increase the ability of locals to engage with each other to build greater capacity for success while allowing flexibility to address locals' diverse needs. It is essential to continue collaboration between governance, local leaders and OEA staff and engage UniServ Leadership Councils to promote alignment with OEA's and NEA's strategic direction.

1. Purpose of the UniServ Leadership Councils is to ensure effective:
  - a. Member engagement, organizing, recruitment and retention of members;
  - b. Regular communication between OEA and assigned local affiliates;
  - c. Opportunities for networking and collaboration among and between leaders of local affiliates;
  - d. Coordination of activities and programs within UniServ Leadership Councils and other association entities.
2. Structure of the UniServ Leadership Councils
  - a. UniServ Leadership Councils shall be formed annually by September 30th of each year. Councils may be organized individually or as joint Councils that include more than one (1) UniServ Leadership Council.
  - b. UniServ Leadership Councils shall be configured in a way that provides a community of interest to the greatest extent possible and may include one (1) or more locals.
  - c. The OEA Executive Director, or designee, shall configure the UniServ Leadership Council assignments.
3. Governance and Representation
  - a. Each UniServ Leadership Council shall maintain a constitution and bylaws and establish an appropriate governance structure.
  - b. All UniServ Leadership Council Chairpersons must be active OEA members in good standing.
  - c. If a UniServ Leadership Council's constitution and bylaws do not address the formula for determining representation on that Council, then representation shall be as follows:
    - i. Each affiliate assigned to that UniServ Leadership Council shall be entitled to one (1) representative who carries one (1) vote.
    - ii. One (1) additional representative and vote if membership is between 101–300.
    - iii. One (1) additional representative and vote for each additional 200 members beyond the 300 or majority fraction thereof.
4. Responsibilities
  - a. UniServ Leadership Councils shall:
    - i. Meet a minimum of four (4) times per year to determine the unique needs of each Council and develop appropriate programming to meet those needs.
    - ii. Review, assess and revise effectiveness of programming to meet the needs and interests of the UniServ Leadership Council's local affiliates.
    - iii. Participate in giving input to the greatest degree possible on the Council's unique needs in determining the recommendation to employ a UniServ Labor Relations Consultant for an existing vacancy which may include the opportunity to interview one or more potential candidates.
    - iv. Provide input and feedback on existing UniServ Labor Relations Consultants as appropriate and participate in the process for resolution if an issue is identified.

5. OEA Support for UniServ Leadership Councils
  - a. OEA shall provide financial and logistical support for Council meetings and programs as appropriate.
  - b. OEA shall annually provide a copy of the UniServ Leadership Council Policy and the UniServ Labor Relations Consultant job description to Council members.
  - c. UniServ Leadership Councils are functions of governance and shall establish appropriate programming, agendas and activities with the support of the assigned UniServ Labor Relations Consultant and other appropriate OEA staff.

(En: 10-21-17)

### **1200.002–Responsibilities & Support of Local Affiliates**

OEA is committed to supporting its local affiliates through programs and opportunities in alignment with OEA's mission, vision, core values and strategic priorities and grounded in the following principles:

1. Collaborative leadership between governance, local leaders and OEA staff
2. Continuous assessment and adjustment of programs in response to local affiliates' diverse needs
3. Creating empowerment opportunities for members to build strong local affiliates, increase engagement and build capacity at all levels

OEA shall support local affiliate leaders in assessing and building local capacity to achieve desired results through the assigned UniServ Labor Relations Consultant and other appropriate OEA staff.

Each local affiliate is responsible for making final decisions related to its direction, policies and programs in consideration of the mission, vision, core values and strategic priorities of OEA. Each local affiliate shares responsibility in providing input and feedback on existing UniServ Labor Relations Consultants as appropriate and participating in the process for resolution if a service complaint is identified.

(En: 10-21-17)

### **1200.003–Resolving Service Complaints Regarding Support of Local Affiliates Policy**

If a local affiliate or an individual member has a service complaint regarding an individual professional staff employee, the member shall contact the employee's immediate supervisor and follow the process outlined in the OEA/PSU Master Contract.

Unresolved service complaints related to the OEA Responsibilities & Support of Local Affiliates Board Policy may be brought before the Business/Support/Administration Committee of the Board of Directors for review and possible recommended action.

Unresolved service complaints to be reviewed by the Business/Support/Administration Committee of the Board of Directors shall be submitted to the committee chairperson in writing.

Final interpretation of OEA Board Policy as related to Responsibilities & Support of Local Affiliates shall be made by the Board of Directors once a recommendation has been received from the Business/Support/Administration Committee of the Board of Directors.

(En: 10-21-17)

## **Labor Relations Consultant Job Description (from Section 8.03 of the Master Contract between the Ohio Education Association and the Professional Staff Union)**

### **I. Title: UniServ Labor Relations Consultant**

#### **1. Function**

Assists the United Education Profession in the achievement of its goals through membership recruitment, promotion, and engagement and support to local associations and members in areas including, but not limited to, organizing, collective bargaining, member rights advocacy, local development and training, professional efficacy, and political advocacy.

#### **2. Responsibilities**

- a. Plans, assists, and/or serves as a consultant to the local association in the collective bargaining process
- b. Assists members and locals in member rights advocacy
- c. Advises leaders in dealing with local operations and assists in local association program development
- d. Assists in the development and dissemination of general communications and may serve as public spokesperson as assigned
- e. Assists local associations in developing effective internal and external public relations programs
- f. Uses OEA/NEA resource personnel and participates in providing programs and support to local associations and members through learning and engagement opportunities such as workshops and trainings
- g. Assists locals with political advocacy at the local, state and national levels
- h. Provides assistance in crisis situations as assigned
- i. Assists existing, new and potential locals in internal and external organizing activities. Collaborates with UniServ Organizers as required
- j. Assists members and locals with professional issues advocacy
- k. Plans, develops, and provides training for leaders and members
- l. Serves in field operations as assigned
- m. Serves as a liaison/advisor and subject matter expert as assigned
- n. Attends major conferences, workshops, etc. in areas of assignment and disseminates relevant information obtained at said approved professional training
- o. Performs other duties as assigned by the immediate supervisor within the job description

#### **3. Authority and Relationships**

Is responsible to the immediate supervisor; recommends policy and procedure changes to and through the immediate supervisor; determines priorities except as established by the OEA.

# Ohio Education Association Service Regions



# Local Association Structure

## Association Leaders

*Suggested Leaders and Responsibilities/Duties (also refer to your Association Constitution and Bylaws)*

### Vice President

- Be prepared to act as president should the need arise
- Act as the President's designee when needed
- Prepare a schedule for attendance at school board meetings
- Become knowledgeable about the contract
- Chair the Constitution and Bylaws Committee
- Assist in recruiting, training, and orienting building representatives and other relevant Association Leaders
- Attend appropriate training conferences/meetings

### Secretary

- Assist the President in preparing agendas for meetings
- Distribute and/or post notices of meetings
- Keep a permanent record of Minutes from meetings and of any Association correspondence
- Maintain the local's archives regarding Constitution and Bylaws, past and present officers, committee structures, etc.
- Attend appropriate training conferences/meetings

### Membership Chair

- Establish a system and program for welcoming and recruiting new hires to the district
- Ensure that each new hire receives information about the Association, and is personally asked to become a member
- Work with the appropriate administrator in the school district (i.e. Human Resources Director, Treasurer) to receive notice of new hires throughout the year and ensure a system that those new hires are informed about the Association
- Order membership materials from OEA and ensure membership materials are distributed to the members
- Maintain accurate membership rosters for the Association and report any additions, deletions, and changes to the OEA Membership Department on a regular basis
- Contact non-members annually to recruit them as members
- Attend appropriate training conferences/meetings

### Local Treasurer

- Receive, protect and disburse all funds of the Association and keep an accurate account of same
- Assist in preparing a budget for the local and serve as financial advisor to the local
- Prepare and submit monthly and annual reports to the Association
- Verify accuracy of payroll deduction of dues with the Association membership chairperson
- Forward payment of dues to the OEA Membership Department
- Have financial records audited each year
- Attend the OEA Treasurer's Workshop and other appropriate training conferences/meetings

### Communications Chair

- Publish an Association newsletter or establish a social media presence for the Association and members
- Prepare a local Association membership directory and telephone tree
- Establish contact with local media outlets
- Assist in the preparation of recognitions for colleagues and members of the public (if determined as an activity of the Association)
- Attend appropriate training conferences/meetings

### **Government Relations and Political Action Chair**

- Implement and coordinate lobbying efforts (letter writing, phone calls, personal meetings with legislators, participation in OEA Lobby Days)
- Campaign for candidates who are friends of education
- Promote involvement in screening of political candidates and actively seek members for legislative screening committees
- Inform membership of the actions of the Legislature
- Attend OEA Lobby Day activities at the State Capitol
- Organize an annual OEA Fund Drive
- Assist in identifying candidates for Board of Education elections and Association efforts to elect pro-teacher Board of Education members
- Attend appropriate training conferences/meetings

### **Grievance Chair**

- Process formal grievances with the assistance of your Labor Relations Consultant
- Keep members informed of their rights and responsibilities in accordance with the contract, current statutes, and Professional Code of Conduct
- Police the contract through familiarization with current language and note where problems occur and where new or revised language may be needed. Work closely with Association negotiations team.
- Be involved in negotiation planning sessions and report suggested contract language revisions based on grievance issues
- Serve as a representative with members at grievance meetings as needed
- Attend appropriate training conferences/meetings

### **Building/Worksite Representative**

- Conduct building meetings
- Keep members informed of activities, events, problems, and Association accomplishments
- Assist in recruiting new members to the local and assist new members in becoming familiar with the District and Association
- Promote 100% membership in the building
- Assist the membership chairperson in maintaining an accurate membership roster by verifying correct names, addresses, and phone numbers of members in the building
- Serve as a main source of communication to the members in the building or department
- Ensure that appropriate Association material is displayed in the building
- Develop a personal contact system for the building and serve as the initiator of any Association messages to be communicated to members in the building
- Distribute Association communications in the building
- Advise the Association President of membership concerns in the building
- Assist members in receiving help they may need regarding member rights, membership concerns, etc.
- Help identify potential Association leaders and volunteers
- Attend appropriate training conferences/meetings

### **Community Outreach Chair**

- Develop a plan and establish community activities for the Association
- Recruit volunteers to assist with community activities
- Increase Association visibility and awareness in the community
- Establish appropriate communication with media outlets regarding Association community activities
- Attend appropriate training conferences



# Local Assessments

The landscape of public education is in a constant state of change. What worked well or made sense a year ago might not work or make sense right now or a year from now. Only by reflecting, learning and building upon what we learn can we ensure that our Unions remain relevant, visible and powerful.

Presidents should work with LRCs to assess their Local's capacity using the OEA Local Assessment Tool. A copy of this tool is available through the LRC. This assessment will help each local to evaluate progress and inform Local Development Plans for the following school year and begin working on the Back-to-School plan for the next year. The Assessment update helps the local evaluate their capacity on eight power indicators. These indicators include, Advocacy, Contract Negotiations, Member Organizing, Community Organizing, Communication, Political Action/Lobbying, Leadership Development and Governance/Finances.

To access The Local Assessment Tool on the Internet, copy and paste this link into your Internet browser:  
**<http://surveys.ohea.org/index.php/655421>**

Other areas for yearly discussion and/or reflections include the following:

- Does our local have a complete, active executive board and worksite representative and distributed leadership structure?
- Are our worksite leaders trained to have relationship-building conversations to identify new member leaders and discern needs and values?
- What information discerned from members could inform planning other engagement or support opportunities going forward?
- What, if anything, should we do differently during the Back-to-School period?
- What training or support do we need from OEA to be prepared to build on the progress we made this past year?
- How will the discoveries made through the Local Assessment process and the data collected throughout the year impact our Local Development Plan for next year? What additional data do we need to collect next year?

# The Local Development Plan

The Local Development Plan is the roadmap to achieving local goals. (See Appendix for Local Development Plan Form) Planning the details for your local is time well spent, as are frequent references back during the year to ensure that goals are on track, that deadlines are being met, responsibilities fulfilled, and benchmarks are being measured. The year-round approach to membership has four primary areas of focus in order to have time to evaluate, reflect, and make mid-year updates that reflect the needs of each local.

The first step in developing a plan is distinguishing between a strategy and a tactic. The Local Development Plan should include both and must distinguish one from the other. In short, strategies (the Why) are long-term plans for achieving goals. Tactics are the short-term means by which to implement these strategies (the How).

Tactics typically have a start and end date, action items to help achieve the tactic, and costs assigned to each. Knowing and anticipating costs is essential in order to seek funding sources to support plans through completion. Also, be sure to assign responsibility for each tactic and plan out your schedule with the school calendar in mind. Who can be responsible for activities during Back-to-School, fall recruitment drives, sports seasons, exams, and holiday and semester breaks? Know the internal capacity to maximize participation and attention.

Finally, what does success look like? How will you know when you have achieved your goals? Establish benchmarks for what you would like to achieve along the way to help determine the effectiveness of the plan. Debrief after each focus area to evaluate, measure achievements, and recalibrate the year-round plan.

Reach out to your Labor Relations Consultant to get more support on the development of your plan.

<b>What (The Goal)</b>	Specific change you want to happen
<b>Why (The Strategy)</b>	<p>Theory of Change which is the narrative story that drives the plan. It's a general but well-reasoned articulation of the plan to win. Questions to consider when developing this theory include:</p> <ul style="list-style-type: none"> <li>• Who are our people?</li> <li>• What is our purpose?</li> <li>• Where is our power?</li> </ul>
<b>How (The Tactics)</b>	<p>Strategic actions that make concrete and measurable progress towards the goal, change, or win you are seeking. Each tactic should result in more:</p> <ul style="list-style-type: none"> <li>• People engaged</li> <li>• Commitment to the purpose</li> <li>• Leaders taking responsibility for supporting others to achieve purpose around a shared vision.</li> </ul>
<b>Data (The Result)</b>	How will you use data to inform your goals and measure the success of your tactics?

# Your Local Constitution and Bylaws – Maintaining Compliance with OEA Affiliation Requirements

OEA Bylaw 9-2 sets forth standards for affiliations of Departments, Districts and Local Associations. This Bylaw lays out what is necessary for you to ensure your local is compliant with OEA's requirements for affiliation. Bylaw 9-2 reads as follows:

## **9-2. Standards for Affiliations of Departments, Districts, and Local Associations.**

An affiliate shall:

- a. Require membership, if eligible, in the local, district, state and national associations provided that if the local association elects by secret ballot to exclude Education Support Professionals from membership, that the affiliated local composed exclusively of Education Support Professionals shall require membership, if eligible, in a local association for Education Support Professionals and the district, state and national associations.
- b. Have a Constitution consistent with the Constitution of OEA.
- c. Adopt a policy that recognizes the preeminence of the Code of Ethics of the Education Profession, if appropriate.
- d. Apply the one-member, one-vote principle for representation on its governing bodies and the affiliate shall provide for ethnic minority representation at least proportionate to its ethnic-minority membership.
- e. Provide for proportional representation between its classroom teacher members and its education support professional members where a multi-jurisdictional affiliate exists.
- f. Require periodic elections of officers by secret ballot subject to recognized safeguards concerning the equal right of all members to nominate, seek office, and vote in elections, as set forth in the OEA Elections Manual.
- g. Conduct all ratifications of collective bargaining agreements in accordance with the guidelines for ratification of collective bargaining agreements and fact finder reports as set forth in the OEA Elections Manual.
- h. Preserve all ballots, marked, unmarked and voided, and all other records pertaining to elections of OEA officers, OEA and NEA delegates and alternates for one year from the election, and make such ballots and other records available to OEA officers and/or designee(s) for inspection and examination.
- i. Have the same membership year as that of OEA.
- j. Have a dues structure to fund adequately a quality program.
- k. Provide for regular meetings.
- l. Provide for effective member communication.
- m. Provide for effective committee structure to achieve the goals of the organization. Such structure will include an election committee.
- n. Be reviewed by the Board of Directors every five (5) years to determine compliance with the above minimum standards.
- o. In the case of a local affiliate, the local must have or be actively seeking the status of exclusive bargaining representative of the members of the local.

It is important that you work with your local officers, executive board, and Labor Relations Consultant to review your local Constitution and Bylaws (C&B) at least once every five years to ensure it is up to date and in compliance with these affiliation standards. The process of reviewing your C&B can be a powerful opportunity for member engagement as well. When you consider issues such as term lengths and limits, committee structures, meeting requirements, election procedures and contract ratification procedures, you and your members should consider what structure will provide you with the greatest opportunity to grow and strengthen your local union.

A complete copy of OEA's Model Constitution and Bylaws as well as the form that OEA Membership Department utilizes to evaluate the compliance of local Constitutions and Bylaws with affiliation standards may be found in the Appendix.