



# ELECTED LEADER HANDBOOK



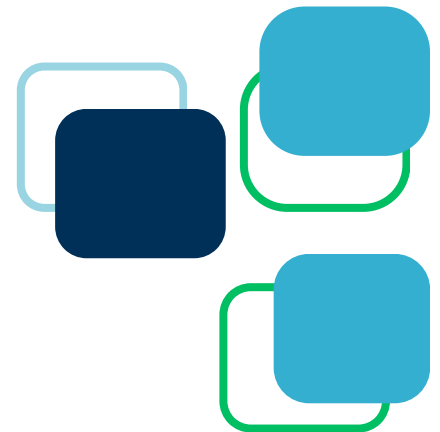
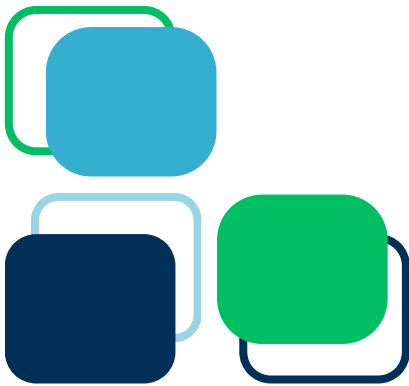
A GUIDE & BEST PRACTICES FOR ALL ASSOCIATION  
REPRESENTATIVES INCLUDING BUILDING REPRESENTATIVES  
LOCAL/REGION OFFICERS.



CENTER FOR **Leadership & Learning**  

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Building Full Capacity Locals



Updated: September 2024



# WHAT IS A FULL CAPACITY LOCAL?

A full capacity local is one that is vibrant, has a relevant, strong, engaged membership, and is dedicated to member services. It is critical that these locals have a knowledgeable, well-trained leadership team. In order to do the best job possible, each member of the leadership team needs to obtain a solid understanding of what the job entails, the elected leader responsibilities that go along with it, and the dedication to develop leadership skills.

While this is not intended to be all-inclusive, it is a great starting point and will provide local or region leaders with basic information and best practices that can help anyone become more effective in carrying out their responsibilities. It also can serve to supplement materials that you may already have, including your local's governance documents and past practices. However, it is important to acknowledge, not *all* past practices are best practices. 😊

In addition to this handbook, there are a number of MEA trainings and conferences that will help strengthen your local and hone your leadership skills in a variety of areas. Please visit the [Center for Leadership & Learning website](#) to learn more about MEA's conferences and trainings. If you are a newly elected president, please contact the MEA Executive Office to get more information on the Presidents' Academy.

*This handbook is a compilation of materials from the efforts and talents of many current and past MEA staff and members - too numerous to name, but not too numerous to thank.*

*Chandra Madafferi, MEA President*

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# PART ONE- LEADERSHIP POSITIONS WITHIN GOVERNANCE

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## First Who, Then What



“It is better to first get the right people on the bus, the wrong people off the bus, and the right people in the right seats - and then figure out where to drive.”

**Jim Collins, Good to Great and the Social Sectors**

# INTRODUCTION

The role of a governing body is to carry out the functions as determined by the bylaws. At the region level, the region elected officers oversee the election of members to the MEA Board of Directors. The region holds several meetings a year to gather information from locals and convey the needs of those locals to the MEA Board and/or the Representative Assembly.

The coordinating council (CC) is composed of representatives from various units serviced by the UniServ/Executive Director. They direct and evaluate the UniServ/Executive Director to assume that the needs of the locals in the coordinating council are being met.

Both the region and coordinating council utilize some form of Robert's Rules of Order to run their meetings, however the level of formality varies. Typically, region and coordinating council presidents are experienced leaders who have been local presidents and have a solid understanding on how to run a meeting, and how to organize a strong, efficient, and productive governing board.

## The Local

A full capacity local is one that has strong yet empathetic leaders that are organized and dedicated to continually organizing new members to grow their leadership bench. They let the current members know their union protects them and that caring individuals are advocating for them and protecting their rights. Other main functions for the local association are to represent its members in areas such as:

- Bargaining and maintaining the contract
- Processing grievances
- Managing local dues dollars
- Making local decisions
- Representing members on district or higher education committees

## Education Association (EA)

Typically made up of education professionals such as certified teachers, licensed counselors, social workers, school nurses, therapists, etc. In higher education (H-EA), these are typically, but not always, the faculty of the university/college.

## Education Support Professionals (ESP)

In the P/K-12 setting, ESPs are often positions that support the function of an efficient, well-run, and safe school. Such positions include, but are not limited to, bus drivers, secretaries, custodians, paraprofessionals, lunch-aides, cooks, playground/hallway monitors, etc. In higher education (H-ESP), many of these are degreed positions that help make the university/college run smoothly. Positions may include, but are not limited to, registration, legal, compliance, and various department support roles.

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 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 president's primary responsibility is to oversee the operation of the local and ensure that functions of appropriate committees and members are carrying out the functions of the local as described in your local/region's **governance documents**.

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

# THE PRESIDENT

The officers and/or committees carry each of the above functions out. Therefore, the president must ensure the following:

- Committees and officers exist to take care of local functions
- Committees and officers are doing their jobs effectively
- A clear plan is established in which accountability is happening to ensure a successful local
- Encourage members to get involved in the association
- Know the contract, and be familiar with MEA constitution and bylaws

**An organization's constitution and bylaws are often referred to as governance documents.**



# THE VICE PRESIDENT

In many local constitutions, the job of the vice president is not clearly spelled out and is often defined as duties “assigned by the president.” In order to have a team of officers that function at the highest level, it is suggested that the vice president takes the time to identify the expectations and responsibilities of the job along with the president.

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

- Serve as the “assistant president” helping and supporting the president of the union
- Be prepared to preside over meetings in the president’s absence
- Serve as a trustworthy, confidential, “sounding board” for the president
- Know the contract, and be familiar with MEA constitution and bylaws
- Serve as co-signer on association bank accounts as authorized
- Encourage members to get involved in the association
- Lend a sympathetic ear to members on criticism and “gripes” that are bothering them
- Serve as chairperson, on occasion, of a program or other designated committees and know the functions of all committees
- Organize new members

## **Potential other duties as assigned:**

- Represent the association at school board meetings
- Serve with or in place of the president on district committees such as restructuring and long-range planning
- Serve as association’s membership chairperson
- Assist the president with grievances
- Take charge of induction/mentoring of new association members
- Head up a special task force to resolve specific long-term member concerns such as work safety issues

In larger associations, there may be more than one vice president to better meet the members’ needs and provide adequate member representation in their local.

- **Example 1:** A vice president for grades P/K-5 and one for 6-12.
- **Example 2:** A vice president of paraprofessionals, and one for secretaries in a larger group that is combined in a support group.
- **Example 3:** A higher ed group may break up positions into colleges or schools within the university.





**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:**

- Establish a record-keeping system and keep a copy of all checks paid, including receipts, if you do not use an online banking system
- Receive all revenues, including dues, and deposit all money in the bank
- Pay all bills of the local
- Sign checks for the local. All checks should be signed by two of the three authorized officers (often the vice president)
- Assist the president with preparing and reviewing the budget
- Report regularly to the board of directors and the membership concerning the income, expenditures, and balance of local monies
- Update your information with the local field assistant and MEA

- Have a committee review the books at the end of the year
- Keep an up-to-date list of all members and nonmembers of the union, which should be done in partnership with another leader such as the membership chair or the vice president.
- If not an individually billed local (IBL), transmit dues to MEA along with necessary forms
- Have a Taxpayer Identification Number (TIN), which is assigned by the Internal Revenue Service (IRS). These allow unions to have bank accounts and file taxes. For help go to:  
[www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online](http://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online)

# THE TREASURER

# COLLECTING DUES

**LBL:** A locally billed local, or LBL, is a local that collects dues dollars directly from the membership via payroll dues deduction or direct deposit, then submits dues dollars to the MEA, region, and the coordinating council on behalf of the membership.

**IBL:** Individually billed locals are made up of members who are individually billed by MEA through a system which deducts money from someone's checking account or a personal credit card. MEA then submits dues dollars to the region and coordinating council on behalf of the member.



## NOTES:

A large white rectangular area with horizontal lines, intended for taking notes.

# THE ASSOCIATION/BUILDING REPRESENTATIVES ARE THE FACE OF THE UNION!

Many times the only direct contact many members may ever have with their association is through their Association Representatives (AR). The importance of ARs cannot be overstated. There is no replacement for a well-trained, dedicated enthusiastic AR when it comes to providing service to members.

## ASSOCIATION REPRESENTATIVES

First and foremost, an AR's job is to represent members and serve as a link between those members and their association. Other key responsibilities include:

- Holding building meetings with members to communicate information, seek input on issues, and address member concerns and questions
- Orienting new members to association activities and services
- Coordinating the prompt distribution of materials to members from the local, MEA and NEA, as well as the timely collection of materials from members
- Interpreting and implementing the master agreement (contract) at the building level
- Handling lower level grievances only if approved by the president
- Serving as the liaison between members and their supervisor/building administrator
- Representing members at all association meetings
- Identifying and developing new association leaders



Sometimes ARs are referred to as union stewards, especially in ESP locals.

# BEING AN AR - WHAT'S IT ALL ABOUT?

The following survey is designed to make you think about your role as an AR in your local association. Use the results as a discussion starter to talk about the expectations, roles, responsibilities and needs of ARs in your local.

Agree/Disagree:

As an AR, I have the potential to bring about change in my local association.	
As an AR, I sometimes worry that I am not well informed enough or skilled enough to do a competent job.	
I feel that my local does not place high importance on being an AR.	
The term of office for an AR should be at least two years with no term limits.	
ARs should hold positions that do not include any supervisory or administrative duties affecting any of the members served.	
ARs need more training in order to do the jobs expected of them.	
The major role of an AR is that of a problem-solver.	
It is critical for an AR to be discreet and to treat all member's questions and concerns with strict confidentiality.	
ARs need to keep the local president updated on all major building occurrences.	
ARs need to ensure that the master agreement is followed in the building.	

It is reasonable to expect an AR to do/know the following:

Agree/Disagree:

Develop a working relationship with each member they serve.	
Promptly advise/assist a member who becomes involved in a situation that could cause legal action from a parent/guardian.	
Advocate, know, and support MEA political decisions, as well as local PAC drives and activities.	
Where to refer a member for information about health insurance, annuities, etc.	
Hold regular building meetings to keep members informed about local and state association activities and decisions.	
Understand the basic structure of MEA and NEA, as well as the function of the coordinating council, region council, etc.	
Attend all scheduled local association meetings in order to represent members.	

# YOU CAN'T DO IT ALONE!

As a union officer, you will quickly realize that you cannot do all of the work by yourself. First, check your local governance documents to see what committees are required and how they are formed. Then look for committed volunteers, not to only help you manage workload, but to lead as it will allow more members to become involved with their association. Remember, large locals have more capacity for member participation. Standing committees that you may want to form include:

- Communication/Public Relations
- Crisis
- Sick bank (if you have one)
- Negotiations Prep Committee
- 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. Most committee chairs are appointed by the president on a yearly basis. In order to build your bench, look for new members to fill these roles. 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 and utilizes the strength 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

COMMITTEE  
CHAIRPERSON



**Please avoid any appearance of conflicts of interest, especially with bargaining and elections committees!**

# ELECTED LEADER'S TO-DO LIST

## Immediate

- Make sure that your UniServ office, MEA, and NEA are notified in writing of your election.
- If you do not have one, register for a free mymea.org email account.
- 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 your superintendent, board president, and news media to introduce yourself and to seek their cooperation in improving the educational program and staff morale.
- 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.
- Set up a monthly meeting schedule for the board of directors and executive committee.
- Make sure that your treasurer understands the dues transmittal obligations.

## Next Up

- Check on significant dates ahead—such as MEA and NEA Representative Assemblies, region and coordinating council meetings, leader trainings, and school board meetings. Make plans to attend.
- Meet with your executive committee and/or board of directors and check to make sure that committees are organized and continue operating.
- Familiarize yourself with and follow accepted rules of parliamentary procedure in conducting meetings.
- Obtain a copy of your district's employee directory (if there is one).
- Establish all necessary task forces and committees.
- Elect delegates to the coordinating council and region council. Make sure they attend meetings and report back to the executive committee and the board of directors.
- Make sure membership materials are distributed.
- Update bank account signature cards.
- Familiarize yourself with your local's constitution and bylaws.
- Establish and maintain contacts with other local association presidents and attend meetings of local presidents, including statewide Presidents' Caucus. Contact the MEA Executive Office to get contact information for this caucus.
- 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.
- Hold a preliminary meeting of the board of directors for the purpose of planning and setting goals for the year.

# ELECTED LEADER'S TO-DO LIST (continued)

## Ongoing

- Establish a list of members interested in participating in local association activities. Keep a “talent file” of these people and call upon them as needed.
- Prepare an agenda in advance for each board of directors and executive committee meeting; send it out in advance of each meeting.
- Check with the local secretary before each meeting to make sure all necessary committee reports, materials, minutes, correspondence, etc. are on hand.
- Require the treasurer to produce and present a monthly finance report for the board of directors and the executive committee.
- Work on achieving the goals you set for the year. Keep the membership informed of what they are and the progress being made.
- Communicate regularly with other officers, especially the vice president.
- Develop a quality working relationship with your UniServ/Executive Director.
- Create a plan to sign up new members.

## NOTES:

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# 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. Good meetings start on time, end on time, and are not 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. Please consider taking a training on how to run an effective meeting and Robert's Rules through the Center for Leadership & Learning.



## The Basics:

- The president never takes sides, but should act as a moderator seeing that all issues are fairly debated
- 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
- 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 leader appointed presides over the meeting until the vote has been announced



# CONDUCTING A BUSINESS MEETING **(continued)**

**You will never regret being too prepared for a meeting!**



## **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 secretary, in advance of the meeting, should send out the notice of the meeting along with the agenda and minutes from the last meeting.
- Prior to the meeting, do not forget to confirm the time, place, and room arrangements. Remind your special guests of meeting.

## **During the meeting:**

- Keep an accurate, permanent record of what transpired during the course of the meeting.

## **After the meeting:**

- Send thank you notes to speakers, guests, and others.
- Send reminders to members assigned to 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.

# PARLIMENTARY PROCEDURES FOR LOCAL PRESIDENTS

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

- **Meeting called to order**
  - The president calls the meeting to order and makes the opening remarks.
  - “The meeting will now come to order. “ (Opening remarks)
- **Roll call, if necessary**
- **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 corrections to the minutes?”
  - “If there are no (further) corrections, the minutes stand approved as read (as corrected).”
- **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.”
- **Reports of Officers**
- **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 actions are made.
  - “We will have the report of the (name) committee given by (name).”
  - “Are there any questions or discussions in regard to this committee’s report?” If not, the report to the committee stands.
- **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.
- **New Business**
  - “Is there any new business?” \*
- **Other items for discussion or program (if any) \***
- **Announcements**
  - “Are there any announcements?”
- **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)

# MOST FREQUENTLY USED PARLIMENTARY MOTIONS

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

**When in doubt about proper parliamentary procedure, use your common sense to clear up problems and continue business. Check out page 27 for more tips on how to communicate during a meeting!**

- \* "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."



# PART TWO- GOVERNANCE

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**Past practice isn't always best practice  
and what is often being done  
isn't in the governance documents at all.**

**So you either need to change your governance documents to match your  
practice or change your practice to match your governance documents.**

**It is really that simple.**

**-Chandra Madafferi, MEA President**

# FIRST THINGS FIRST - BASIC INFORMATION

## LOCAL ELECTIONS

It is very important that you notify MEA with the results of your local/region elections, and report newly elected local officers on the Officer Election form, which should be filled out and sent to your local's field office. Local election results should be reported within **30 days of the date of the election**.

Forms for reporting election results are available at [mea.org/governance](http://mea.org/governance), under the Forms section.

If you are a new president or have questions, call your local field office.

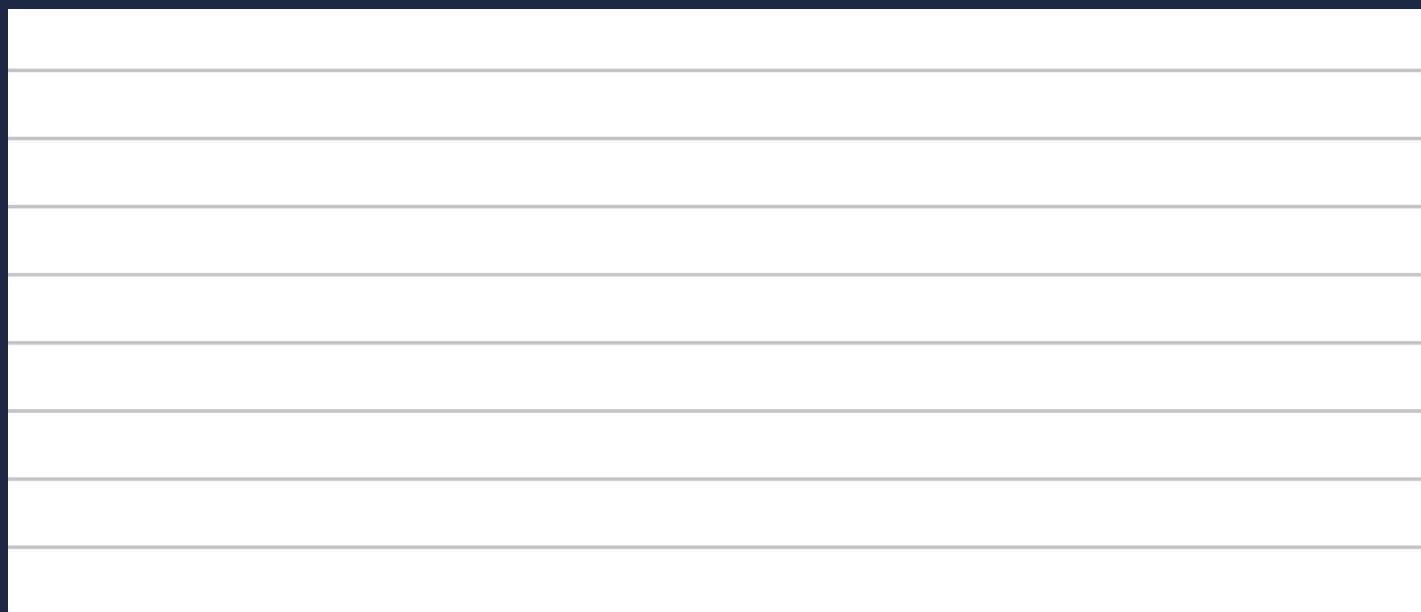
## GOVERNANCE DOCUMENTS

It is crucial that you not only obtain your local's constitution & bylaws, but they must also be the guiding principles that drive your process. Your local/region must follow the procedures as laid out in your constitution & bylaws, regardless of past practice!

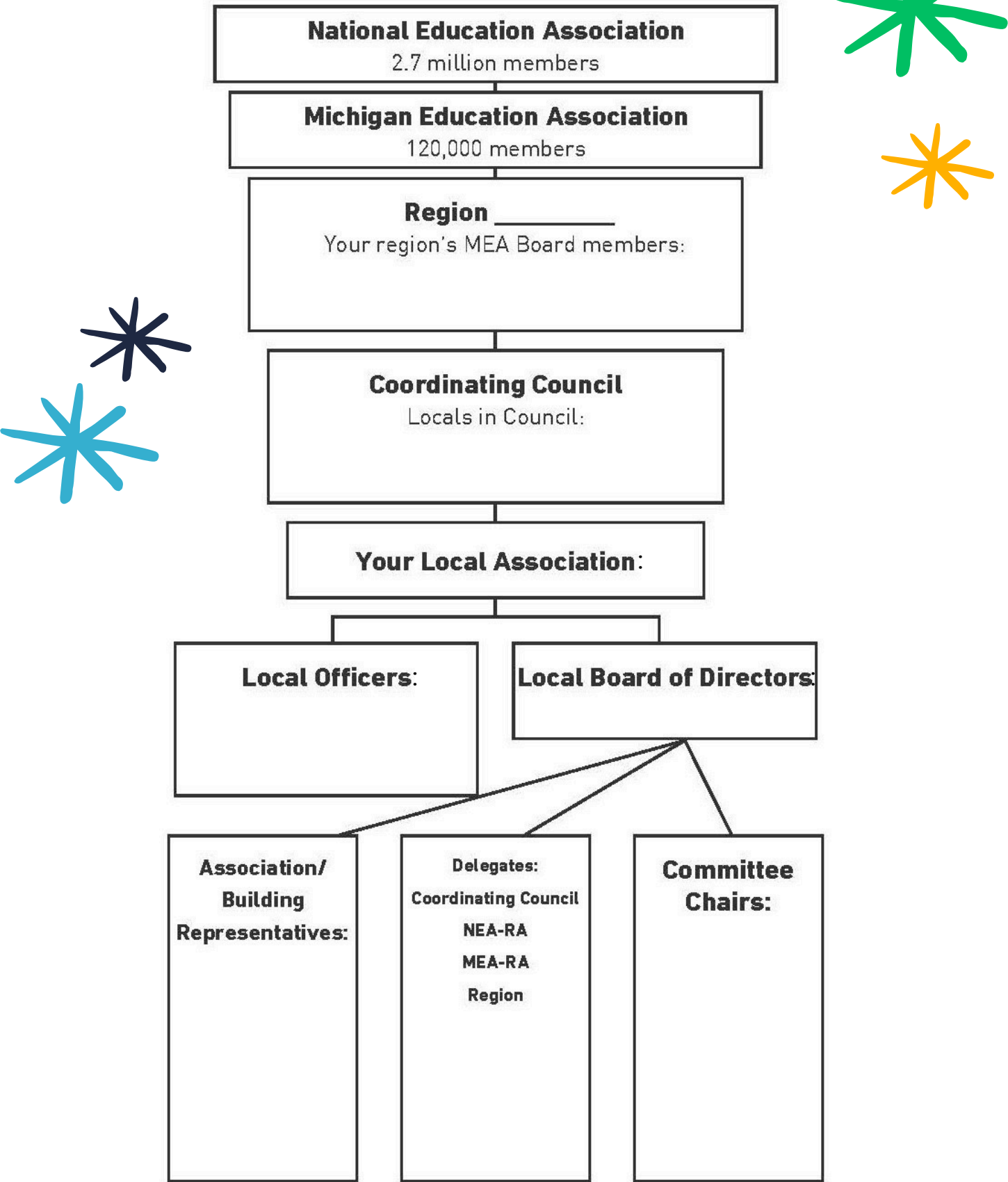
## GOVERNANCE STRUCTURE

The diagram on the following page is a tool for you to personalize for your local. Remember to include names and contact information of your leaders as a resource.

## NOTES:



# GOVERNANCE STRUCTURE



# MEA LEADERS & INFO

MEA President:

MEA Vice President:

MEA Secretary-Treasurer:

MEA Sr. Executive Director:

PAC stands for:

MEA website:

MEA toll-free number:

Your Local President:

Your Local President's contact information:

Your UniServ/Executive Director:

Your UniServ/Executive Director's contact information:

Your local association's region:

Number of MEA Board Members in your region:

Your local association's MEA zone:

Your MEA Zone Director:

Your Zone Director's contact information:

How much are your local association's dues for one full-time member?

How are MEA dues calculated for full-time EA/ESP members?

**Fill in the blank!**

# HOW WELL DO YOU KNOW YOUR CONTRACT?

1.	How many levels are there in your local's grievance procedure? _____
2.	Where can you find language regarding filling vacancies in your bargaining unit? Page # ____, Article # ____, Section ____
3.	Where can you find language regarding voluntary transfers? Page # ____, Article # ____, Section ____
4.	Where can you find information about sick days? Page # ____, Article # ____, Section ____
5.	How many sick days does each member get per year? _____
6.	Does your contract have language regarding personal days? If so, how many? _____
7.	Does your contract contain language regarding class size? YES <input type="checkbox"/> NO <input type="checkbox"/>
8.	Where can you find information about health care insurance? Page # ____, Article # ____, Section ____
9.	According to your contract, how many days are you required to work this year? _____
10.	On which page of your contract can you find this year's salary schedule? Page # ____, Article # ____, Section ____
11.	Where can you find how many hours you are expected to work each day? Page # ____, Article # ____, Section ____
12.	How is seniority defined in your contract? _____
13.	Who signed the contract on behalf of your local? _____
14.	What date does your contract expire? _____
15.	Where can you find association rights? Page # ____, Article # ____, Section ____
16.	Where can you find information about the Family Medical Leave Act (FMLA)? Page # ____, Article # ____, Section ____



# PART THREE- INTERNAL & EXTERNAL COMMUNICATIONS

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**“Seek first to understand,  
and then to be understood.”**

**-Seven Habits of Highly Effective People, Stephen Covey**



# EFFECTIVE COMMUNICATION KEY....

## Good leaders are great listeners!

We spend about 90% of our waking hours communicating in one form or another. It is estimated that we spend 7% of this time writing, 38% speaking, and 55% listening.

Despite all the “practice” we get listening, we only listen at about 25% of our listening capacity, which means we distort, forget, ignore, or misunderstand 75% of what we hear! Good listening skills will dramatically affect your ability to effectively resolve member issues—both gripes and grievances!

## 10 best practices to improve your listening skills:

1. Let the other person speak first
2. Put the speaker at ease
3. Show that you want to listen
4. Minimize distractions
5. Use empathy, put yourself in the speaker’s place
6. Be patient
7. Hold your temper
8. Go easy on the criticism and argument
9. Ask questions
10. Listen “actively” (more on this below)

## Ineffective listening behaviors to avoid:

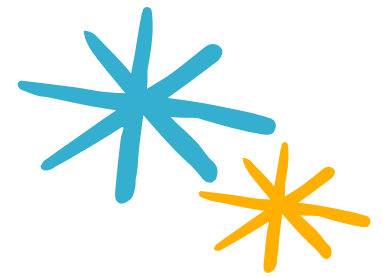
1. Editing—you hear only what you want to hear
2. Rehearsing—you think about what you want to say while the other person is speaking
3. Deriving—you focus on finding a hidden message, rather than listening to what the other person is saying
4. Daydreaming— you let your mind wander
5. Personalizing—you relate everything the person is saying to your own life
6. Switching—you change the subject quickly as soon as the person stops speaking
7. Arguing—you focus on finding something to judge
8. Agreeing - you nod your head to everything in order to avoid conflict

## Effective listening is ACTIVE listening!

Active listening means providing open, direct attention and encouragement to the speaker. It involves deliberately putting aside assumptions, prejudices, distractions, and defensive or critical thoughts. An active listener makes direct eye contact with the speaker, speaks in a voice that is encouraging and supportive, and uses body language and facial expressions that communicate interest, empathy, and concern.

Follow the Golden Rule: Listen and respond to others the same way you would like them to listen and respond to you.

# RESPONDING TO THE SPEAKER



## Nonverbally:

Good nonverbal communication includes making eye contact, leaning in toward the person speaking, nodding occasionally to show understanding or empathy, writing down important details and appearing interested and relaxed (be careful not to concentrate so much on writing that you forget about the speaker).

## Verbally:

If you want to be encouraging in order to convey interest or to keep the person talking, try using statements such as:

“Can you tell me more...”

“I’m glad to be here with you, and I want to hear what you have to say...”

“Why don’t you start at the beginning...”

“I’ve got plenty of time, so take your time...”

If you want to clarify what has been said or get more information, try using statements such as:

“Can you explain this further...”

“When did this happen, where, how...”

If you want to show that you are listening and understanding, and to check your interpretation of what has been said, try using statement such as:

“I thought I heard you say...”

“So, what you would like to see happen is...”

If you want to show that you understand how the other person feels, try using statements such as:

“You seem very upset...”

“Seems like you’re under the weather today, want to talk...”

## Sometimes people get defensive...

Oftentimes, when you discuss sensitive issues with members or ask questions about such issues, you may get some defensive reactions. The tone and wording that you use are very important. Members should always come away from a meeting feeling that you are on their side and that you understand their concerns. To reduce defensive reactions in others:

- Be aware of the difference between cold silence and warm silence
  - Cold silence: listening with no reaction—discourages speaking
  - Warm silence: listening while making eye contact and appearing intent and interested encourages speaking
- Always focus on BEHAVIOR, not the personality
- Use “I” statements, not “You” statements
  - “I” statements are specific and make your desires clear
  - “You” statements are accusing and put others down

# TIPS ON DEALING WITH ADMINISTRATORS/SUPERVISORS

As a union officer or association/building representative, 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 an AR's presence at a conference with a member. The following tips will help you to be an effective member advocate in these situations:

## **Be strong yet respectful and remember you are an equal party**

- As a union officer or association/building representative, you are a representative of the association, just the same as the administrator is a representative of the board. Act as an advocate, not as an employee in such meetings.
- As an advocate, you have the right to ask questions and make statements on behalf of the association without interference and without suffering reprisals.
- Command respect from the administration. Do not allow the administrator to treat you or the member less than respectfully. If demeaning behavior should occur, state your objections clearly, and if necessary, suspend the meeting immediately.



## **Develop a strategy for every meeting**

- If you are going with a member, make sure they know the strategy in advance of the meeting
- Decide who is going to speak and to what extent. The member may be so emotionally caught up in the issue that they may react in a manner that is detrimental to their position
- Decide how either of you will signal the other that you want to call a caucus to discuss something during the meeting
- Do not get sidetracked. Casual chitchat may be used to get a meeting going, but shouldn't be allowed once you begin
- If new facts are presented during the meeting, you may need to call a caucus (a break) with the member, or stop the meeting and reschedule, or discuss what is being said



# DO YOU THINK LIKE AN ADVOCATE?

Answer the following questions by filling in the blank with your answer (Yes, No, Maybe) that most closely correlates with your beliefs.

I believe that all members' concerns are valid.	
I am committed to protecting the rights of all members.	
I am committed to searching out all the resources available through my local association, MEA and NEA to support a member's position.	
Even if I develop some personal prejudices about this member, or the circumstances surrounding an incident, I will continue to do in all my power to advocate for the member or I will find someone who can.	
If it begins to appear that evidence supports the position of the other side, I am prepared to carry through my responsibility to search out all the facts supporting a member's position.	
In advocating for a member, I believe that my personal opinion is irrelevant and that what is most important is finding every fact, argument, witness and resource necessary to advocate for the member.	
I am prepared to do some extensive listening.	
I believe that the burden of proof is on the other side, not ours.	
I will be honest and straightforward with all people concerned as I advocate for a member.	
I will be diligent in separating rumors from facts and insist that there always be a distinction between the two when advocating for a member.	
I believe in the right of due process for every member.	

*If you answered more than two of the statements above with a "no" or "maybe," you may want to re-think what you believe the role of an association advocate to be.*

# IMPORTANT CONTACT INFORMATION

**President's Contact Information:**

**Vice President's Contact Information:**

**Secretary's Contact Information:**

**Treasurer's Contact Information:**

**UniServ/Executive Director's Contact Information:**

**UniServ Field Assistant/Office Contact Information:**

**Coordinating Council Chairperson's Contact Information:**

**NOTES:**

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# MEA COMMUNICATIONS

In addition to the MEA officers and other senior leaders who can help you, MEA has many talented, creative, and dedicated staff who can help with promotional materials and/or a local communications plan. Also, please don't forget your UniServ/Executive Director as many of them were leaders like you and will be able to give you great ideas for a successful plan.

**YOU'VE GOT  
CONNECTIONS!**

- Message development and management tailored to your association's needs.
- Targeted materials designed to help you connect with your members.
- Crisis public relations—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 flyers, our award-winning graphic artists serve your design needs free of cost, and our in-house print shop features low prices and large selection of stock. Request a job ticket through your local field office.

**If you need it,  
just ask!**











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**517-332-6551 / 800-292-1934**  
**MEA.ORG**

The mission of the MEA is to protect, advocate, and advance the rights of all education professionals to promote quality public education for all students.