Stepping Up to the Plate

A Training Guide for

EMERGING LEADERS
The National Education Association is the nation’s largest professional employee organization, representing 3.2 million elementary and secondary teachers, higher education faculty, education support professionals, school administrators, retired educators, and students preparing to become teachers.

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# Training Agenda

## DAY ONE

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<td>8:00 AM – 9:00</td>
<td>Registration</td>
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<tr>
<td>9:00 AM – 9:30</td>
<td>Opening &amp; Welcome</td>
</tr>
<tr>
<td></td>
<td>Trainers and Participants Introduce Themselves</td>
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<tr>
<td></td>
<td>Discuss Objectives</td>
</tr>
<tr>
<td></td>
<td>Handout 1 (Objective, Attitude, Skills, Knowledge)</td>
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<tr>
<td></td>
<td>Review Agenda</td>
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<tr>
<td></td>
<td>Explanation of the Commitment Contract</td>
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<tr>
<td></td>
<td>Handout 2 (Sample Participant’s Commitment Contract)</td>
</tr>
<tr>
<td>9:30 AM – 10:30</td>
<td>Section 1: NEA Overview</td>
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<tr>
<td></td>
<td>Handout 1A—NEA History</td>
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<tr>
<td></td>
<td>Handout 1B—Who’s Who in the Association? Exercise</td>
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<tr>
<td></td>
<td>Handout 1C—Acronyms Exercise</td>
</tr>
<tr>
<td>10:30 AM – 10:45</td>
<td>BREAK</td>
</tr>
<tr>
<td>10:45 AM – 11:15</td>
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</tr>
<tr>
<td></td>
<td>Election Handouts A and B—Guidelines for Mock Elections (2 pages)</td>
</tr>
<tr>
<td></td>
<td>Campaign Work Period by Participants</td>
</tr>
<tr>
<td>11:15 AM – 12:00</td>
<td>Section 2: Leadership Roles and Responsibilities</td>
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<tr>
<td></td>
<td>Handout 2A—Roles of an Association Leader</td>
</tr>
<tr>
<td>12:00 Noon – 1:00</td>
<td>LUNCH</td>
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<tr>
<td>1:00 PM – 4:00</td>
<td>SKILLS WORKSHOPS</td>
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<tr>
<td></td>
<td>(Participants break out into two groups. Each group will rotate through three</td>
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<tr>
<td></td>
<td>skills training sessions—two on Day 1 and a recap on Day 2)</td>
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<tr>
<td>1:00 PM – 2:15</td>
<td>First Workshops (1 1/4 hours each)</td>
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<tr>
<td></td>
<td>Meetings Skills (Meetings Handouts A-F)</td>
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<tr>
<td></td>
<td>Communications Skills (Communications Handout A)</td>
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<tr>
<td></td>
<td>Membership Recruitment Skills (Membership Recruitment Handouts A-F)</td>
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<tr>
<td>2:15 PM – 2:30</td>
<td>BREAK</td>
</tr>
</tbody>
</table>
Introduction

This NEA training guide is designed to help local and state Association members who have stepped forward to become leaders in their local organizations. It can be used as a resource for existing leaders or as a training program to help prepare potential leaders for their leadership roles in the state and local Associations.

**LEARNING GOALS FOR EMERGING LEADERS TRAINING**

- Understand the history and mission of the National Education Association
- Understand the structure and relationships of the national, state, and local Associations
- Understand the role/s of an Association leader
- Identify the skills needed for Association leadership
- Learn how to run a successful meeting
- Learn how to develop a meaningful message
- Understand the Association leader’s role in recruiting members

**HOW TO USE THIS MATERIAL**

The program can be used as a two-day training session or a series of independent workshops. It is divided into three main sections:
1. NEA History and Governance Structure
2. Leadership Roles and Responsibilities
3. Membership Recruitment and Development

There are four workshops which can be presented in conjunction with any of these sections, incorporated into other programs, or used by themselves. They are especially relevant for the Leadership Roles and Responsibilities module. They are:
- Mock Election Exercise
- Meetings Workshop
- Communications Workshop
- Membership Recruitment Workshop
**INTRODUCTION**

Understand the history and mission of the National Education Association

Understand the structure and relationships of the national, state, and local Associations

Understand the role/s of an Association leader

Identify the skills needed for Association leadership

Learn how to run a successful meeting

Learn how to develop a meaningful message

Understand the Association leader’s role in recruiting members

**Learning Goals for Emerging Leaders Training**

- Understand the history and mission of the National Education Association
- Understand the structure and relationships of the national, state, and local Associations
- Understand the role/s of an Association leader
- Identify the skills needed for Association leadership
- Learn how to run a successful meeting
- Learn how to develop a meaningful message
- Understand the Association leader’s role in recruiting members

**VISUAL 1—INTRODUCTION**

**VISUAL 2 ELEMENTS OF THE EMERGING LEADERS TRAINING**

**Objective:** To generate enthusiasm and to motivate the participants to prepare for future leadership positions in their national, state, and local Associations.

**Attitude:** To help participants believe that they can become effective leaders in their national, state, and local Associations.

**Skills:** To identify qualities participants need in order to be prepared for leadership in their national, state, and local Associations.

**Knowledge:** An Association leader listens to the ideas, needs, aspirations and wishes of the members and then, within the context of his or her own well-developed system of beliefs, responds in an appropriate fashion.

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**OPENING WELCOME**

NEA was founded and has been built by education personnel who came forward as leaders because they understood the need for more recognition, accurate job descriptions, improved terms and conditions of employment, and professional development for the employees in a public school district.

You and other members like you have had the courage and persistence to organize and then work hard collectively to transform the education environment in this country.

This is the beginning of your organizational journey, and the intent of this program is to cultivate, nurture, encourage, and advance each and every one of you to be leaders in your Association.

We intend to help you become empowered and committed, with a fresh understanding of who you really are and what you really can do in your local and in your school community.

By the end of this training, we expect that you will have learned how to:

- Be recognized as a leader by your members
- Know your role as an Association representative
- Be motivated, and gain self-confidence
- Put your knowledge into practice

Why should members step up to the plate and become emerging leaders? Why shouldn’t they just remain passive members? Without active participation, the organization will not survive.

**So, step up to the plate!**

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**OPENING**

Welcome and introduction of staff

**Trainer:** Have staff introduce themselves individually, emphasizing where they are from originally and what was their organizational journey to standing before participants today.

Have participants introduce themselves and give a brief explanation of where they are from, the general makeup of their local, and why they are here.

Discuss objectives, using Handout 1: “NEA Emerging Leaders Training”

Review agenda.

Explain the contract participants are asked to sign, using Handout 2: “Sample Commitment Contract”
Elements of the Emerging Leaders Training

Objective: To generate enthusiasm and to motivate the participants to prepare for future leadership positions in their national, state, and local Associations

Attitude: To help participants believe that they can become effective leaders in their national, state, and local Associations

Skills: To identify qualities participants need in order to be prepared for leadership in their national, state, and local Associations

Knowledge: An Association leader listens to the ideas, needs, aspirations and wishes of the members and then, within the context of his or her own well-developed system of beliefs, responds in an appropriate fashion

NEA Emerging Leaders Training

Objective: To generate enthusiasm and to motivate the participants to prepare for future leadership positions in their respective national, state, and local Associations.

Attitude: To help participants believe that they can become effective leaders in their national, state, and local Associations.

Skills: To identify qualities participants need in order to be prepared for leadership in their national, state, and local Associations.

Knowledge: An Association leader listens to the ideas, needs, aspirations and wishes of the members and then, within the context of his or her own well-developed system of beliefs, responds in an appropriate fashion.
SECTION 1

NEA Overview

OBJECTIVES OF THIS SECTION (VISUAL 1)
• Understand the history and mission of the National Education Association
• Understand the structure and relationships of the national, state, and local Associations
• Understand the duties of various Association leadership positions (See Handout 1A)

NATIONAL EDUCATION ASSOCIATION AT A GLANCE

Beginnings
The National Teachers Association was founded in Philadelphia, Pennsylvania, by 43 public school teachers. It was incorporated as the National Education Association by an Act of Congress in 1906. (See Appendix, "NEA History"

(VISUAL 2)
Mission
"To fulfill the promise of a democratic society, the National Education Association shall promote the cause of quality public education and advance the profession of education; expand the rights and further the interest of educational employees; and advocate human, civil, and economic rights for all." (See Appendix, "NEA History"

Strategic Focus
NEA will focus the energy and resources of its members toward restoring public confidence in public education.

The NEA Symbol
The pi symbol, adopted by the NEA Executive Committee in 1966, combines the legacy of the past (π for παίδευς, the ancient Greek word for education) with new direction for the future. The rounded triangle serving as the background represents the mutually supportive programs of education. This single image, then, symbolizes the forward thrust of education through a unified profession.

HANDOUT 2

Sample Commitment Contract

My scholarship to attend the “EMERGING LEADERS WORKSHOP” will include:
1. Transportation and a pre-paid hotel room at the conference, which I will share with another Emerging Leaders Workshop participant.
2. Meals included during the conference. (Please note: It is recommended that participants be prepared to pay for meals not provided at the conference.)
3. Attendance for the remainder of the conference through Sunday. Please make travel arrangements so you may attend the recognition ceremony for Emerging Leaders prior to the conference closing session.
4. All materials and registration fees.

I agree to the following:
• I will show up at all meetings on time.
• I will attend all sessions.
• I will demonstrate a willingness to become involved in this training.
• I will assume responsibility for my action(s) and the action(s) of my group.
• I will agree to follow the agenda and will commit the extra time necessary to make this program successful.
• I will demonstrate a willingness to communicate openly, honestly, and directly during this training.
• I will execute and bring this contract and the agenda to the opening session of the workshop.
• I will reach out and meet new and different people.

I WILL BECOME MORE INVOLVED UPON RETURNING TO MY LOCAL ASSOCIATION.
Specifically, for my local Association, I plan to:

SIGNATURE

IF YOU HAVE QUESTIONS, PLEASE CONTACT YOUR LOCAL OR STATE ASSOCIATION OFFICE OR THE ESP QUALITY DEPARTMENT AT (202) 822-7131.
Membership
NEA is the nation’s largest professional employee association. Its 3.2 million members include elementary and secondary school teachers, higher education faculty, education support professionals, school administrators, retired educators and ESP, and college students preparing to teach.

(Visual 3)
Structure
NEA has 54 state-level affiliates: 50 state Associations, Utah, USEA, UPHA, DC, and the Federal Education Association. NEA’s more than 17,750 local affiliates include some 800 higher education affiliates.

Governance
Association policy at all levels is set by the members, either directly or through their elected representatives. An assembly of elected local member representatives (Representative Assembly, or RA) meets annually to pass constitutional changes, resolutions, and business items. There is an annual national RA, attended by some 9,000 delegates, in addition to annual state level assemblies. These assemblies set guidelines and policy matters for the year. Staff, working closely with the governance structure, carries out the mandates of the resolutions and business items during the year. General and overall policies of the Association are set by goals and objectives found in the Association Constitution. Between annual meetings of the RA, a nine-member Executive Committee and a 159-member Board of Directors act for the Association. (See Handout 1B, “Who’s Who in the NEA?”)

Activities of the Local
Each local Association provides a variety of services to its members. The Association advocates for its members about salaries, benefits, and working conditions. Improving working conditions for members is directly related to the improvement of learning conditions for students and the public’s confidence in public education. The local Associations work with the national Congress, the state legislature and governor, as well as local superintendents and boards of education.

Local Representation
The local Association representatives are the vital link between the national, state, and local Associations and the rank-and-file members.

CATEGORIES OF NEA MEMBERSHIP
Active
Any person who has earned bachelor’s degree or higher or who holds a regular professional certificate or a regular vocational or technical certificate and is employed in a teaching, supervisory, or administrative position or who is otherwise recognized by State Board of Education regulations as a teacher in a public or private school, junior or senior college, or university.

Education Support Professional
Persons not identified in any other membership classification who are employed in school systems and who assist the professional personnel to provide improved educational opportunities, e.g., lunchroom workers, bus drivers, mechanics, custodians, paraeducators, school office personnel.

Associate
Any person not eligible for membership in any other category who is approved by the Local Association Board of Directors. Associates pay dues but are not eligible to vote or hold office.

Retired
All persons who have earned and are receiving monthly pension checks from the state teachers’ retirement system or other public pension plan as a result of their own employment record. Retired membership is unified and includes membership in both the state and the national retirement association. All retirees (regardless of former active level, pay, or classification) are termed “retired teachers.”

Student
Any student enrolled in college or university teacher preparation programs; students join through a chapter of the Student National Education Association. Student members have the rights and privileges of associate members.

Staff
Any person employed by the Association or any of its affiliates in a professional staff position.

Substitute
An educational employee employed on a day-to-day basis who is eligible for Active or Education Support Professional membership may join the Association as a substitute member, unless said employee is eligible for NEA-Retired membership.

Handout 1B can be used to become more familiar with NEA’s structure and governance. Handout 1C can help you keep track of the meanings of the many acronyms used by the Association.
Objectives of This Section

- Understand the history and mission of the National Education Association
- Understand the structure and relationships of the national, state, and local Associations
- Understand the duties of various Association leadership positions

NEA’s Mission

“To fulfill the promise of a democratic society, the National Education Association shall promote the cause of quality public education and advance the profession of education; expand the rights and further the interest of educational employees; and advocate human, civil, and economic rights for all.”

NEA’s Strategic Focus

NEA will focus the energy and resources of its members toward restoring public confidence in public education.

NEA Symbol

The pi symbol combines the legacy of the past (p for paideia, the ancient Greek word for education) with new direction for the future. The rounded triangle serving as the background represents the mutually supportive programs of education. This single image symbolizes the forward thrust of education through a unified profession.
SECTION 1: NEA OVERVIEW

The President has the major responsibility for the success of the local Association. The President should be willing to give time and effort to the duties of the office, have an interest in the profession, and possess a cooperative spirit for working with school employees, administrators, the board of education and the public. The President should act as coordinator and leader for all the activities of the Association, but should not attempt to do all the work. Don’t forget that other officers, Association representatives, and committee chairpersons are there to help.

The local Association President should:

- preside over meetings
- appoint committee members and delegate duties to them
- plan the local Association’s objectives, programs, and meetings in cooperation with other officers and the local executive committee members and/or Association reps
- encourage united membership of all school employees in the Association
- recruit and develop new leaders among Association members
- exercise general supervision of the budget
- serve as chief spokesperson for the local Association to the public and the press, assisted by a competent communications/public relations committee
- encourage direct Association efforts to win cooperation and understanding between the school staff and the community
- understand and promote programs sponsored by NEA national, state, and local organizations
- serve as a clearinghouse for essential information, referring new NEA materials to appropriate committee chairpersons or the membership
- coordinate long-range planning for Association programs, goals, and activities

NEA Structure

National Office
Elected Officers, Executive Committee, and Board of Directors
54 State-level Affiliates
17,750 Local Affiliates
3.2 million members

NEA Governance

Local Members
Representative Assembly or General Membership Meetings
Board of Directors
Executive Committee

NEA Members

Active
Education Support Professional
Higher Education
Associate
Retired
Student
Staff
Substitute

DUTIES OF LOCAL ASSOCIATION PRESIDENT

The President has the major responsibility for the success of the local Association. The President should be willing to give time and effort to the duties of the office, have an interest in the profession, and possess a cooperative spirit for working with school employees, administrators, the board of education and the public. The President should act as coordinator and leader for all the activities of the Association, but should not attempt to do all the work. Don’t forget that other officers, Association representatives, and committee chairpersons are there to help.

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- understand and promote programs sponsored by NEA national, state, and local organizations
- serve as a clearinghouse for essential information, referring new NEA materials to appropriate committee chairpersons or the membership
- coordinate long-range planning for Association programs, goals, and activities
Duties of Local Association Treasurer

Responsibilities of the local Association Treasurer grow steadily as school employees realize the advantages of adequate finances, planned budgets, incorporation, and appropriate Internal Revenue Service classification. Local Association Treasurers should be certain that their names are on file with state and national NEA so that important notices will reach them promptly.

The local Association Treasurer is expected to:
- receive all of the income of the local Association
- bank all funds to the credit of the Association
- pay such funds on orders signed by himself, the President, and the Secretary, unless otherwise provided
- keep an itemized record of all receipts and expenditures
- maintain records and file reports needed to maintain appropriate status of incorporation and Internal Revenue Service classification
- make such reports as may be required by the Constitution and Bylaws or by order of the President
- prepare an annual report for the Association
- present for audit all necessary records to the proper person
- assist the other officers in preparing the budget for the coming year
- work with Association reps to recruit and maintain membership
  a. set up enrolling procedures
  b. be responsible for all money received and membership cards issued
  c. keep an accurate list of all paid members
  d. make remittances and reports of memberships
  e. verify accuracy of payroll deductions for dues

Duties of Local Association Vice President

The position of Vice President has historically been a very difficult one to describe. Vice Presidents are expected to do everything and anything. Your local Association has probably already designated specific tasks to the Vice President, but if not, here are some to consider:
- assist the President in all of the functions of the office
- act as President in the President’s absence
- be ex-officio member of all committees
- oversee major projects of the Association
- assist in recruiting, training, and orienting Association reps
Duties of Local Association Secretary

The Secretary’s most important function probably is interpreting the discussions at local Association meetings. Failure to clearly record the proceedings of a meeting may confuse the officers and members of the Association.

It is the responsibility of the Secretary to:

- accurately reflect action in the meeting by getting to the heart of each pertinent discussion
- keep a permanent minute book and to make the minutes and records available to members upon request
- notify officers, committees and Association reps of appointments
- notify all committee members and Association reps of assignments and time and place of meetings
- certify with the local Association President the names of all persons chosen to serve as delegates from the local Association to annual meetings, including NEA Convention
- keep a systematic method of filing letters received, copies of letters sent, and records of the Association; Treasurer’s reports; up-to-date copy of the Constitution and Bylaws; a list of all committee members and Association reps, their addresses and telephone numbers; and copies of all committee and miscellaneous reports
- send out notices of Association meetings to Association reps and members
- carry on the correspondence of the Association, that is, correspondence which is not a function proper to other officers
- take a place beside the President or Chairperson at all meetings
- preside over meetings in the absence of the President and Vice President, and continue to so serve until those present have named a Chairperson pro tem
- prior to each meeting, prepare an order of business for the use of the presiding officer
- to keep the Association’s official membership list (unless another officer or staff member has this duty)
- to sign all certified copies of acts of the Association unless otherwise specified in the Bylaws

(Many Associations divide these duties between recording and corresponding secretaries. This division serves a dual purpose. It divides the work and provides a substitute if one is absent.)

Who’s Who in the National Association?

During this training, you may have the opportunity to meet some of the officers listed below. Take this opportunity to learn something about their respective responsibilities to the Association.

Fill in the blanks as you find out who each officer is. Make every effort to also meet the person and secure their signature.

<table>
<thead>
<tr>
<th>POSITION</th>
<th>NAME</th>
<th>DUTIES</th>
<th>SIGNATURE</th>
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<tbody>
<tr>
<td>NEA President</td>
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<td>NEA Vice President</td>
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<td>NEA Secretary-Treasurer</td>
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<td>NEA Executive Committee Member</td>
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<td>NEA Executive Director</td>
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<td>NCESP Chair</td>
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<tr>
<td>NEA Board Member from Your State</td>
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**Who’s Who in the State/Local Association?**

During this training, you may have the opportunity to meet some of the officers listed below. Take this opportunity to learn something about their respective responsibilities to the Association.

Fill in the blanks as you find out who each officer is. Make every effort to also meet the person and secure their signature.

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<thead>
<tr>
<th>POSITION</th>
<th>NAME</th>
<th>DUTIES</th>
<th>SIGNATURE</th>
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<tbody>
<tr>
<td>State Executive Director</td>
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<td>State Associate Executive Director</td>
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<td>NEA Board Member from Your State</td>
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<td>State/Local Board Member</td>
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<td>State/Local President</td>
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<td>Local Vice President</td>
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<td>Local Secretary</td>
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<td>Local Treasurer</td>
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<td>UniServ Director</td>
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**What Do the Following Acronyms Mean?**

You will often hear the following jargon used by Association leaders. It is important that everyone understands these terms when they are used. Write the correct meaning for each acronym that you learn during this two-day session. Hint: Not all are just NEA jargon. Good luck!

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
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<tbody>
<tr>
<td>NEA</td>
<td>National Education Association</td>
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<tr>
<td>NEA-FC</td>
<td>NEA Family Council</td>
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<tr>
<td>AR</td>
<td>Action Request</td>
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<tr>
<td>RA</td>
<td>Restraint Action</td>
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<tr>
<td>HCR</td>
<td>Hearing Committee Request</td>
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<tr>
<td>PR</td>
<td>Position Request</td>
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<tr>
<td>MIP</td>
<td>Membership in Position</td>
</tr>
<tr>
<td>ESP</td>
<td>Employee Support Program</td>
</tr>
<tr>
<td>RIF</td>
<td>Retention in Field</td>
</tr>
<tr>
<td>AAA</td>
<td>American Association of American Artists</td>
</tr>
<tr>
<td>AFL-CIO</td>
<td>American Federation of Labor-Congress of Industrial Organizations</td>
</tr>
<tr>
<td>NEA-R</td>
<td>NEA Representative</td>
</tr>
<tr>
<td>AFT</td>
<td>American Federation of Teachers</td>
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<tr>
<td>NCESP</td>
<td>National Council on Elementary and Secondary Education</td>
</tr>
<tr>
<td>PR&amp;R</td>
<td>Professional Relations and Representation</td>
</tr>
<tr>
<td>BOE</td>
<td>Board of Education</td>
</tr>
<tr>
<td>GR</td>
<td>Grand Rapids</td>
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<tr>
<td>NCUEA</td>
<td>National Council of Urban Education Associations</td>
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</table>

(See Appendix B for answers)
Mock Election Exercise

**OBJECTIVES OF THIS EXERCISE**

- To become familiar with the logistics of conducting an election for local Association officers
- To practice setting goals and presenting a vision for the Association in order to win the election

**DUTIES OF AN ELECTION COORDINATOR**

- Read and understand election rules and all local policies governing elections
- Follow directions carefully
- Maintain integrity in all aspects of elections
- Be prompt and accurate
- Ensure that all members have the opportunity to vote by secret ballot
- Know and follow your Association’s rules regarding campaigning

**PROCEDURES FOR MOCK ELECTION**

This exercise is part of the two-day Emerging Leaders training. The concept of mock elections can be introduced to the participants before the segment about Leadership (Section 2), right after the morning break on Day One.

By that time, the participants will have been provided information about the roles and responsibilities of Local Association officers.

Participants will break up into four “camps,” according to the color dots on their nametags. Each camp should choose either a President (red and blue camps) or a Vice President (green and yellow camps), and immediately submit those names to the workshop facilitator.

Each camp should also choose two “Election Commissioners,” whose names should be given to the facilitator by the end of Day One.

**TIPS FOR EFFECTIVE CAMPAIGNING**

- Assemble a campaign team (chairperson, speechwriter, section leaders)
- Develop a clear message or vision
- Make sure your campaign materials reflect your vision and goals
Campaign organizing can begin immediately. Campaign speeches and the election will be held immediately following the luncheon on Day Two.

The election results will be announced by the end of the Conference.

**CAMPAIGN ESSENTIALS**
- Select a campaign chairperson
- Find a speech writer/editor
- Identify your team or section leaders
- Develop a clear message or vision
- Find a public relations coordinator
- Prepare materials/flyers/placards for distribution
- Make sure all publicity reflects your vision and goals for the Association

**Objectives of This Exercise**
- Learn how to conduct an election for local Association officers
- Practice setting goals and presenting your vision for the Association in order to win the election

**Duties of an Election Commissioner**
- Read and understand election rules and all local policies governing elections
- Follow directions carefully
- Maintain integrity in all aspects of elections
- Be prompt and accurate
- Ensure that all members have the opportunity to vote by secret ballot
- Know and follow your Association’s rules regarding campaigning

**Tips for Effective Campaigning**
- Assemble a campaign team (chairperson, speechwriter, section leaders)
- Develop a clear message or vision
- Make sure your campaign materials reflect your vision and goals
Guidelines for Mock Elections

1. Political camps will be determined by the color of the dot on your nametag. They are RED, GREEN, BLUE and YELLOW.

2. The guidelines will be reviewed by one of the facilitators during the opening session.

3. The participants should separate according to the colors on the nametags. Select a candidate according to the instructions of the facilitator. Identify candidates by political camps. Candidates for President will run from the RED and BLUE camps. Candidates for Vice President will run from the GREEN and YELLOW camps.

4. The names of the candidates should be submitted to the facilitator immediately. The names of two Election Commissioners for each camp should be submitted no later than the end of Day One sessions.

5. Campaign organizing may occur as designated in the agenda and any other time deemed necessary by the campaign team.

6. Candidate speeches will be presented after the conference luncheon on Day Two.
   a. One minute for nomination (or introduction) of the candidate.
   b. Two minutes will be allowed for each candidate’s speech.

7. The election will be held on Day Two, immediately following the speeches. Commissioners will be responsible for distribution and collection of all ballots. All Emerging Leaders training participants in attendance will be eligible to vote. Staff may neither vote nor be involved in governance campaigns or elections.

8. Remove all campaign materials and dispose of them by the end of Day Two.

9. The official Election Committee will count the ballots.

10. The election results will be announced by the end of the Conference.

---

Mock Election Slate

Submit this completed form to the facilitators.

Name of Political Camp (color):

______________________________

Candidate’s name:

______________________________

Seeking which office:

______________________________

Commissioners’ names:

______________________________
Leadership Roles and Responsibilities

OBJECTIVES OF THIS SECTION

(Visual 1)
- Understand the various roles of an Association leader
- Discuss eight essential leadership skills

ROLES OF AN ASSOCIATION LEADER

(Visual 2)
Association leaders can expect to wear a number of hats in the course of their stewardship. Here are seven of the most important roles you will play:
1. Leader
2. Communicator
3. Organizer
4. Advocate
5. Election Coordinator
6. Mediator
7. Recruiter

Distribute Handout 2 and review these points:

Leader:
- Leaders are developed through action, not through training
- Continue to learn, grow, and stay involved
- You can’t be afraid to take risks
- Confront problems, don’t ignore them
- Be visionary. Think “outside the box”
- Know when to “step in” and when to “step out”
- Lead by example

Communicator:
- Be the “vital link”—maintain two-way communications between members and the Association
- Distribute newsletters and other information
- Establish an Association bulletin board and keep it current
- Set up e-mail distribution list for members (and non-members)
**Recruiter:**
- Be first to welcome new employees, then follow up by inviting them to join
- Know how to enroll new members and have materials handy
- Be able to answer the “hard questions” and refute myths about the Association
- Know the “selling points” of the Association
- Ask every non-member to join

The afternoon workshop series will present skills training for many aspects of these various roles.

**EIGHT ESSENTIAL SKILLS OF LEADERSHIP**

**VISUAL 3**

**1. Sensitivity**
- An effective leader is sensitive to...
  - Issues
  - People
  - Community and school district problems
  - Future trends

How a leader behaves is the most important part of being sensitive. It is the visible expression of our attitudes—what others actually see and then respond to.

**2. Be a Risk Taker**
- People avoid risks for many reasons:
  - “We’ve never done it before.”
  - “Nobody has ever done it before.”
  - “It’s a change.”
  - “It’s too radical a change.”
  - “Members won’t like it.”
  - “We’re not ready for it.”
  - “You’re right, but…”

---

**Advocate:**
- Be the “eyes” and “ears” of your members and the Association
- Be ready to represent a member with an administrator
- Publicize Association victories to your members
- Know the laws, policies, and procedures
- Involve others in Association tasks
- Attend Association meetings and training (local, state, national) and share what you learn
- Ensure that members receive fair treatment
- Recognize the difference between a gripe and a grievance

---

**Electoral Coordinator:**
- Read and understand election rules and all local policies governing elections
- Follow directions carefully
- Maintain integrity in all aspects of elections
- Be prompt and accurate
- Ensure that all members have the opportunity to vote by secret ballot
- Know and follow your Association’s rules regarding campaigning

---

**Mediator:**
- Listen
- Practice techniques for dealing with difficult people
- Don’t judge; get both sides of the story
- Offer suggestions to resolve the problem
- Help each party understand the viewpoint of the other party
- Look for “win/win” situations and find ways for both parties to “save face”
Leadership means understanding the difference between power grabbing and power sharing.

**Abuses of Power**  
*(VISUAL 5)*

- Arrogance: Over-evaluating yourself
- Vanity: Craving admiration and applause
- Disloyalty: Violating the trust you have been given
- Intemperance: Indulging your appetites and cravings
- Presumption: Assuming superiority and privilege

Never be a legend in your own mind.

A wise leader…
- helps and mentors others
- is respected and admired
- cannot be intimidated
- can always be trusted
- is listened to
- is inclusive and involves as many people as possible to share the power, the fame, the success
- is one whose followers can say, "It happened naturally, and we all contributed"
- is always glad to hear the previous statement

**SECTION 2: LEADERSHIP ROLES AND RESPONSIBILITIES**

**3. BE A DECISION-MAKER**  
*(VISUAL 4)*

Indecision wastes time, energy, talent, money, resources, goodwill, and—most of all—opportunity. By courageously facing issues and then making a decision, a leader initiates action to solve a problem. A good leader knows someone has to step up and take responsibility.

Ask yourself these questions when preparing to make a decision:

1. What is the objective of the decision?
2. Which leader should make the decision?
3. What is the timeline?
4. Is there enough information?
5. Who will be affected by the decision?
6. What risks are involved in the decision?
7. Has an action plan been developed?
8. Is the action plan ready for implementation?
9. How will the consequences of the decision be tracked?
10. Once the decision is implemented, is there a mechanism for review and revision?

**4. USE POWER WISELY**

These reactions have one thing in common: fear of failure. But fear doesn’t have to be a deterrent. It can sometimes provide an opportunity for more creative, imaginative solutions to problems.

- Fear sharpens perceptions.
- Fear quickens reactions.
- Fear alerts the mind and senses.

**5. BE A COMMUNICATOR**  
*(VISUAL 6)*

You cannot force your ideas and policies on others and expect obedience and results. But if you can really communicate your organizational values, mission, and objectives so that others want to own a piece of your passion, you will be able to move your agenda.

Listening is the key to communication. Problems in an organization or association often result when leaders fail to hear the real nature of a problem because they are not listening.

A communicator doesn’t hear just what she wants to hear, but rather, what is really going on. A communicator pays attention to body language and behavior in addition to what is being said. A communicator listens with her heart as well as her mind. And a communicator knows example is the loudest voice.

A leader who communicates…
When building a team, always find a way to work with those people who step forward to participate—do the job, make the call, be on the committee, chair the task force, run for office. You put up the tent, then get everyone inside—friends and foes alike. If others are willing to take the risk and do the work, an effective leader works with them no matter who they are or what their relationship is.

7. be courageous

Courage is the state of mind or spirit that enables one to face danger with self-possession, confidence, and resolve.

An effective leader has the courage to ...
- step forward and get involved
- speak out
- express beliefs
- seek what is true
- assume responsibility
- stand for something
- have faith in accomplishment
- be humble
- be ethical and consistent
- challenge cynicism
- resist peer pressure
- be controversial
- persist
- be vulnerable
- follow as well as lead
- be humble
- be ethical and consistent
- challenge cynicism
- resist peer pressure
- be controversial
- persist
- be vulnerable
- follow as well as lead

Dig a little deeper into your own passions and motivations in order to evaluate your courage. Then, have the courage to invest in yourself, to build leadership skills, to define your own passion, and to step up and serve.

8. be committed

In the end, leadership is about two things: passion and commitment. A leader must be committed ...
- to making a difference—the passion of your mission
- to being a big thinker—attracting others to you
- to inspiring trust—your followers must know you are ethical
- to being a change master—able to open the door to a solution
- to being a sensitive leader—in order to inspire others to join
and then be loyal
• to being a team leader—to maximize potential in others
• to being a communicator—to forge productive relationships in order to accomplish a shared mission
• to being a decision-maker—to step up and be responsible in order to create activity
• to using power wisely—in order to master influence
• to being a risk taker—to expand the possible
• to being courageous—to strengthen everyone’s resolve

Leadership is also all about perception. If you want to be an effective, empowered organization leader tomorrow, act like one today.

Objectives of This Section

• Understand the various roles of an Association leader
• Discuss eight essential leadership skills
Roles of An Association Leader

1. Leader
2. Communicator
3. Organizer
4. Advocate
5. Election Coordinator
6. Mediator
7. Recruiter

Eight Essential Skills of Leadership

1. Sensitivity
2. Risk-taking
3. Decision-making
4. Using power wisely
5. Communicating effectively
6. Team building
7. Courage
8. Commitment
Decision-Making Questions

1. What is the objective of the decision?
2. Which leader should make the decision?
3. What is the timeline?
4. Is there enough information?
5. Who will be affected by the decision?
6. What risks are involved in the decision?
7. Has an action plan been developed?
8. Is the action plan ready for implementation?
9. How will the consequences of the decision be tracked?
10. Once the decision is implemented, is there a mechanism for review and revision?
Communicators...

- motivate and inspire people to take action
- build cooperation and trust
- maintain focus on the issues
- resolve conflicts
- provide accurate information
- prevent communication breakdowns

Eight Basics of Team Building

- Meeting
- Directing
- Motivating
- Training
- Deciding
- Delegating
- Gratifying
- Complimenting
Rules for Successful Team Building

1. Praise in public—correct in private.
2. Praise what’s right—train for what’s wrong.

Courage is the Ability to …

- step forward and get involved
- speak out
- express beliefs
- seek what is true
- assume responsibility
- stand for something
- have faith in accomplishment
- be humble
- be ethical and consistent
- challenge cynicism
- resist peer pressure
- be controversial
- persist
- be vulnerable
- follow as well as lead
A Leader Must Be Committed to …

- making a difference
- being a big thinker
- inspiring trust
- being a change master
- being a sensitive leader
- being a team leader
- being a communicator
- being a decision-maker
- using power wisely
- being a risk taker
- being courageous

Leader:
- Leaders are developed through action, not through training
- Continue to learn, grow, and stay involved
- You can’t be afraid to take risks
- Confront problems, don’t ignore them
- Be visionary. Think “outside the box”
- Know when to “step in” and when to “step out”
- Lead by example

Communicator:
- Be the “vital link”—maintain two-way communications between members and the Association
- Distribute newsletters and other information
- Establish an Association bulletin board and keep it current
- Set up e-mail distribution list for members (and for non-members)
- Speak at every staff meeting
- Communicate all business transacted at Association meetings to your members

Organizer:
- Maintain a resource file for your members
- Report your members’ concerns and issues to the Association
- Never tell a member, “I can’t help you”
- Promote the Association at every staff meeting
- Help members understand the advocacy role of the Association
- Seek members’ advice and input on issues pending before the Association

Advocate:
- Be the “eyes” and “ears” of your members and the Association
- Be ready to represent a member with an administrator
- Publicize Association victories to your members

Recruiter:
- Be first to welcome new employees, then follow up by inviting them to join
- Know how to enroll new members and have materials handy
- Be able to answer the “hard questions” and refute myths about the Association
- Know the “selling points” of the Association
- Ask every non-member to join

Election Coordinator:
- Read and understand election rules and all local policies governing elections
- Follow directions carefully
- Maintain integrity in all aspects of elections
- Be prompt and accurate
- Ensure that all members have the opportunity to vote by secret ballot
- Know and follow your Association’s rules regarding campaigning

Mediator:
- Listen
- Practice dealing with difficult people
- Don’t judge; get both sides of the story
- Offer suggestions to resolve the problem
- Help each party understand the viewpoint of the other party
- Look for “win/win” situations and find ways for both parties to “save face”
Meetings Skills Workshop

OBJECTIVES OF THIS WORKSHOP (VISUAL 1)

• To learn how to run a successful and productive meeting
• To understand the principles of parliamentary procedure

RUNNING A SUCCESSFUL MEETING (VISUAL 2)

An Association’s power and effectiveness depends on the active involvement of the membership—from attending meetings to participating in activities such as lobbying, rallies, or leafleting at polling places. Members become active if they have a chance to participate in the decision-making process, and one place to do that is at regular Association meetings.

One skill every leader should master is how to plan and hold a successful meeting. Many Associations these days have difficulty getting people to attend meetings. Here are some suggestions for increasing participation.

Always have a reason to call for a meeting (Meetings Handout A)

While many members want to participate, no one wants to waste time at a meeting that doesn’t accomplish anything. Make people want to come. Plan and print an agenda in advance. When possible, advertise one or more specific subjects that will be discussed. Posters and leaflets should tell not only when and where the meeting will be held but also why it is worth attending.

Make the meetings interesting and productive

Make sure there is some activity associated with the meeting. The activity can take many forms. It can be to provide information, discuss upcoming legislation, to endorse a candidate, to pass a proposal, to promote a plan, to appoint a committee, to ask for volunteers, to decide on a contract, to inform the membership, and/or to congratulate the membership.

Plan ways for members to participate. Give as many members as possible assignments such as making a report, leading a discussion, taking notes, or arranging for beverages.
Meetings drag on too long, attendance will drop off. For most meetings, be brief. If word gets around that the Association meetings are often long, attendance will suffer. It may be necessary to hold serial meetings at different times.

Plan at least one discussion of actions that can be taken to deal with issues raised at the meeting. Committee members can ask members at the meeting to help them research a problem further, talk to other people who are affected, draw up a petition, etc. Have them report on progress at the next meeting. This process can keep members from feeling that "nothing ever gets decided at Association meetings."

**Invite each member**
Using your Association reps, the school "pony," your e-mail list, or whatever distribution method you have access to, ask each member to come. If you can, try to find out why they aren't coming if participation is spotty.

Schools with high turnouts should be recognized at meetings, in Association publications, and on the local's Web site.

**Make it easy for people to attend**
Set up carpools for people who need a ride. Be sure to publicize the availability of transportation.

Provide child care in a separate room or nearby location, staffed by member volunteers or their teenage children. For some members the Association meeting will then be a good opportunity to talk with other adults without taking care of kids at the same time.

Invite members to bring their spouses. Often, a member's commitment to the Association is stronger if their spouse understands the issues.

Provide non-alcoholic drinks or light snacks if the meeting must be held at meal time.

Make sure the meeting time is convenient. Consider the varied work schedules of members in different job titles and decide on a time that most can make. It may be necessary to hold serial meetings at different times.

Keep the meetings brief. If word gets around that Association meetings drag on too long, attendance will drop off. For most groups, one hour would be a long meeting; two hours would be a maximum length.

**Use one meeting to build for the next**
Promote the next meeting while you have people together, and tell them what will be covered.

Ask each member to give you one or two names of people they think could bring to the next meeting. By writing down those names, you will make people feel they should follow through. Tell them to let you know if members they contact give a reason for not planning to come—no transportation or child care, mad at the Association for some reason, not a convenient time, etc. Then together you can try to figure out what to do about that problem.

**TEN COMMANDMENTS FOR AN EFFECTIVE MEETING LEADER**

**VISUAL 3**

1. **Speak to your power base first.** Inform your supporters before your adversaries.
2. **Be inclusive.** Everyone is welcome and a variety of views is encouraged. Any help is better than none, so accept all offers.
3. **Don't get angry in public.** Remain professional. Your demeanor is always important. Members see how you behave before they understand what you are telling them.
4. **Think before you speak.** Once you say it, it is out there, and can come back to haunt you.
5. **Understand varied commitment levels and the impact of meetings on personal life.** Be grateful for any level of commitment. And thank members who come to a meeting and participate. Your level of commitment must always be greater than theirs, however. They probably want what you want, but they did not run for office and are not the leader.
6. **Know your audience.** Take the time to know your membership, your organization, and your district. If your members feel you really understand who they are, they will respect you for it and want to participate.
7. **Present the positive.** Your presentation should be optimistic and well-planned. The place for discussing roadblocks and barriers is in private with your working circle of leaders.
8. **Make sure you understand each position.** The leader should be clear about whatever is being discussed. Don't take anything for granted. Never assume you understood and find out later you didn't.
9. Present your vision for achieving your goals. Having a plan is paramount. Members come to a meeting with the expectation the leader has a plan. Don’t disappoint them. If you do they won’t come again.

10. Always: no anger, no animosity, no sarcasm, and never any personal attacks. You are the leader. You should act like one.

PARLIAMENTARY PROCEDURE

Parliamentary procedure provides consistency, guidelines, and credibility in a meeting for everyone involved—the officers and the membership alike. It enables those who are in charge to feel comfortable taking responsibility, and gives those who are not in charge a means to be heard and participate without feeling helpless and distrustful.

Parliamentary procedure provides legitimacy for the leadership and a voice for the membership.

Here are a few rules:

Meetings Handout B

1. The President is really a moderator. He or she is non-partisan in the Chair, seeing that members are treated equally, regardless of which side of the question they debate. The President is in many respects like an umpire or referee.

2. The President never makes a motion while in the Chair, nor does the President debate a motion without first having called the Vice-President or other person to preside in his/her place. In such an event, the President does not usually resume the Chair until the vote has been announced.

3. The mover may request to withdraw or modify a motion without consent of anyone before the motion has been put to the group for consideration. When the motion is before the assembly and if there is no objection, the President announces that the motion is withdrawn or modified. In anyone objects, the request is put to a vote.

4. When making the motion to close debate, the traditional form is: “I move the previous question...”

5. The motion to postpone the question until a definite time later should, of course, mention the specific time proposed.

6. The motion to refer to committee should specify the number on the committee, how the committee is to be selected, and when the committee is to report.

7. When members of the assembly call out informally, “Question! Question!” the Chair is merely to understand that they as individuals are ready to vote on the pending question or motion.

8. Without securing recognition from the Chair, or even without waiting for a speaker to yield the floor, a member may rise to a point of order, to a point of information, or to a question of privilege. No second is necessary.

9. The President should not permit one or two constant talkers to dominate the meeting. Time is limited; everyone should receive equal opportunity to speak. The Chair should not recognize the same person twice until all others who wish to speak have had an opportunity.

See Meetings Handout C for sample parliamentary procedure and language.

Meetings Handout D gives a sample agenda for a typical Association meeting.

MINUTES

(Meetings Handout E)

The proceedings of a meeting are usually called the minutes. The minutes should contain mainly a record of what was done at the meeting, not what was said by the members. They should be written accurately, clearly, and concisely, for they are often referred to in confirmation of an action, as a source of information, or as a record. The minutes should never reflect the Secretary’s opinion, favorable or otherwise.

Notes on writing minutes:
The first paragraph of the minutes should contain the kind of meeting, the name of the Association, the date, time, and place of meeting, the name of the presiding officer, and the fact that the minutes of the previous meeting were read and approved or amended.

The body of the minutes should contain a separate paragraph for each subject and should show the main motions, giving (a) the wording of the motion, (b) the disposition of the motion, including any amendments, and (c) the name of the mover. The minutes also can show the facts (only parenthetically) as to how the motion may have been debated.

The minutes should include all points of order and appeals whether sustained or lost, together with the reasons given by the Chair for his/her ruling.

The last paragraph should state the hour of adjournment.
When a count has been ordered or the vote is by ballot, the number of votes on each side should be entered. Roll call votes should indicate the names of those voting on each side.

Minutes should be signed by the Secretary.

Meetings Handout F, "Planning a 10-minute Meeting," shows a speeded-up version of a typical meeting.

**Objectives of This Workshop**

- To learn how to run a successful and productive meeting
- To understand the principles of parliamentary procedure
**Tips on Holding Successful Meetings**

- Always have a reason to call for a meeting
- Make the meetings interesting and productive
- Invite each member
- Make it easy for people to attend
- Use one meeting to build for the next

**Ten Commandments for an Effective Meeting Leader**

1. Speak to your power base first
2. Be inclusive
3. Don’t get angry in public
4. Think before you speak
5. Understand varied commitment levels and the impact of meetings on personal life
6. Know your audience
7. Present the positive
8. Make sure you understand each position
9. Present your vision for achieving your goals
10. No anger, animosity, sarcasm, or personal attacks
Basics of Parliamentary Procedure

1. The President is a moderator.
2. The President does not make motions or participate in the debate while acting as Chair.
3. The person making the motion may request to withdraw it before the vote.
4. To close debate, say “…I move the previous question…”
5. Questions may be postponed until a definite time in the future.
6. Motions to refer to committee should have details about the committee.
7. People call “Question! Question!” when they’re ready to vote.
8. A member may rise to a point of order, to a point of information, or to a question of privilege without recognition from the Chair.
9. The President should not permit one or two constant talkers to dominate the meeting.

Handout A

Why Meet?

People meet for many reasons. Some meeting topics (e.g., scheduling project activities) are action-oriented. They require a decision or a series of discussions. Others (e.g., how to operate the new copier) are information-oriented. No decisions are required, but the information may be used for future action. Most meetings combine aspects of both.

<table>
<thead>
<tr>
<th>Action-Oriented</th>
<th>Information-Oriented</th>
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<tbody>
<tr>
<td>• Make decisions</td>
<td>• Socialize</td>
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<tr>
<td>• Analyze</td>
<td>• Inform</td>
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<tr>
<td>• Plan</td>
<td>• Affiliate</td>
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<td>• Team-build</td>
<td>• Track progress</td>
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<td>• Solve problems</td>
<td>• Celebrate</td>
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<tr>
<td>• Evaluate performance</td>
<td>• Report</td>
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<tr>
<td>• Conciliate</td>
<td>• Learn</td>
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</tbody>
</table>

By the end of this meeting, we will have...

<table>
<thead>
<tr>
<th>(product)</th>
<th>(knowledge)</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ A plan for ______________________</td>
<td>❑ An awareness of ______________________</td>
</tr>
<tr>
<td>❑ An agreement on __________________</td>
<td>…so that we can __________________</td>
</tr>
<tr>
<td>❑ A list of ________________________</td>
<td>❑ An understanding of __________________</td>
</tr>
<tr>
<td>❑ A process for ____________________</td>
<td>…so that we can __________________</td>
</tr>
</tbody>
</table>
Parliamentary Procedure Without Pain

1. The President is really a moderator. He or she is non-partisan in the Chair, seeing that members are treated equally, regardless of which side of the question they debate. The President is in many respects like an umpire or referee.

2. The President never makes a motion while in the Chair, nor does the President debate a motion without first having called the Vice-President or other person to preside in his or her place. In such an event, the President does not usually resume the Chair until the vote has been announced.

3. The mover may request to withdraw or modify a motion without consent of anyone before the motion has been put to the group for consideration. When the motion is before the assembly and if there is no objection, the President announces that the motion is withdrawn or modified. In anyone objects, the request is put to a vote.

4. When making the motion to close debate, the traditional form is: “I move the previous question...”

5. The motion to postpone the question until a definite time later should, of course, mention the specific time proposed.

6. The motion to refer to committee should specify the number on the committee, how the committee is to be selected and when the committee is to report.

7. When members of the assembly call out informally, “Question! Question!” the Chair is merely to understand that they as individuals are ready to vote on the pending question or motion.

8. Without securing recognition from the Chair, or even without waiting for a speaker to yield the floor, a member may rise to a point of order, to a point of information, or to a question of privilege. No second is necessary.

9. The President should not permit one or two constant talkers to dominate the meeting. Time is limited; everyone should receive equal opportunity to speak. The Chair should not recognize the same person twice until all others who wish to speak have had an opportunity.

Sample Parliamentary Procedure

Action from the Floor

1. Member stands to present a motion:
   “Madam President.”

2. Recognizes speaker:
   “Mrs. Smith.”

3. Motion is proposed:
   “I move that...”

4. Seconder need not stand
   “I second the motion.”

Floor discussion must be addressed to the President. Motions may be amended or disposed of in various ways.

5. Presents the motion for discussion:
   “The motion has been made by Mrs. Smith and seconded that... (states the motion). Is there any discussion?”

6. Puts the motion to vote:
   “If there is no further discussion (no comment signifies consent), the motion is (repeats motion).”

   Members cast their votes.

   “DIVISION” may be called for if “voice vote” is questioned.

7. States the results, if majority can be determined:
   “The Ayes (or Noes) have it. The motion is carried (or is defeated).”

   “DIVISION” may be called for if “voice vote” is questioned.

8. Must call for a show of hands or a standing vote:
   “All in favor raise right hand (or stand).”

   Tellers may be needed for count.

   Members repeat vote by new procedure.

9. Announces result.
Sample Procedure, continued

**Action from the Floor**

1. **After a main motion has been made and seconded, a member may AMEND:**
   
   “I move to AMEND the motion by....”
   
   (Deletion, insertion or substitution of words, sentences, phrases, or a paragraph or a combination of the above.)

2. **The motion to AMEND is seconded:**
   
   “I second the motion to AMEND.”

**Action by the President**

Remember that action has NOT been completed on the MAIN MOTION. It must be considered again after disposition of the amendment.

1. **Presents the AMENDMENT for discussion:**
   
   “It has been proposed to AMEND the motion to read as follows... (the motion and AMENDMENT is repeated). Is there any discussion?”

Floor discussion of the AMENDMENT.

2. **Puts the AMENDMENT to vote:**
   
   “If there is no further discussion, the AMENDMENT is... (repeats amendment).”

Vote on the AMENDMENT.

   “All in favor of the AMENDMENT, please say ‘Aye.’ ”

   “All opposed....”

3. **Announces results on AMENDMENT:**
   
   “The AMENDMENT is carried (or defeated).”

Floor Discussion on MAIN MOTION.

4. **Puts motion, plus the AMENDMENT, IF CARRIED, to vote.**

The house proceeds to vote.

5. **Announces final result on MAIN MOTION.**

---

Sample Procedure, continued

<table>
<thead>
<tr>
<th>Action</th>
<th>DEBATABLE</th>
<th>AMENDABLE</th>
<th>VOTE REQUIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. To adjourn (only when business unfinished)</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>2. To lay on table</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>3. To close debate</td>
<td>No</td>
<td>No</td>
<td>2/3</td>
</tr>
<tr>
<td>4. To postpone until definite time</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>5. To refer to committee</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>6. To amend</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
<tr>
<td>7. To postpone indefinitely</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
</tr>
<tr>
<td>8. Main motion</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
</tr>
</tbody>
</table>
Sample Agenda Form

Name of Group Meeting _______________________________________________________________

Name of Presiding Officer ____________________________________________________________

Date _______________________________________________________________________________

1. Call to Order ________ (time)
2. Minutes of Previous Meeting
3. Reading of Correspondence
4. Report of Treasurer
5. Report of Standing Committees
   a) 
   b) 
   c) 
6. Report of Special Committees
   a) 
   b) 
   c) 
7. Unfinished Business
   a) 
   b) 
   c) 
8. New Business
9. Program
10. Comments from General Membership and Guests
11. Adjournment __________(time)

Date of Next Meeting ________________________________________________________________

Location __________________________________________________________________________

Time ______________________________________________________________________________

HANdOUT E

Minutes

The proceedings of a meeting are usually called the minutes. The minutes should contain mainly a record of what was done at the meeting, not what was said by the members. They should be written accurately, clearly, and concisely, for they are often referred to in confirmation of an action, as a source of information, or as a record. The minutes should never reflect the Secretary’s opinion, favorable or otherwise.

NOTES ON WRITING MINUTES:

The first paragraph of the minutes should contain the kind of meeting, the name of the Association, the date, time, and place of meeting, the name of the presiding officer, and the fact that the minutes of the previous meeting were read and approved or amended.

The body of the minutes should contain a separate paragraph for each subject matter and should show the main motions giving (a) the wording of the motion, (b) the disposition of the motion, including any amendments, and (c) the name of the mover. The minutes should also show the facts (only parenthetically) as to how the motion may have been debated.

The minutes should also include all points of order and appeals whether sustained or lost, together with the reasons given by the Chair for his/her ruling.

The last paragraph should state the hour of adjournment.

When a count has been ordered or the vote is by ballot, the number of votes on each side should be entered. Roll call votes should indicate the names of those voting on each side.

Minutes should be signed by the Secretary.

On the back of this sheet is an outline for the Secretary’s use in writing the minutes of an Association meeting.
**HANDOUT E**

**Minutes, continued**

Name of Group Meeting

Date: ___________________ Location: ___________________ Time: ___________________

Meeting called to order at _______ by _______

Members present:

Minutes of previous meeting (approved as distributed/corrected as noted):

Correspondence:

Treasurer’s Report:

Announcements:

Committee Reports:

Unfinished Business:

New Business:

Date of Next Meeting: ___________________ Location: ___________________ Time: ___________________

Meeting adjourned at_______

Minutes approved_____Date_____

**HANDOUT F**

**A Hypothetical 10-Minute Meeting**

<table>
<thead>
<tr>
<th>MINUTES</th>
<th>TOPIC</th>
<th>RATIONALE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Minutes (Minutes 1-2)</td>
<td>Brief overview of major topics discussed at last Association meeting.</td>
<td>We’re keeping members informed. Keeping members informed is not a matter of how much they are told, but rather a feeling that leaders are working hard to keep the members up to date.</td>
</tr>
<tr>
<td>4 Minutes (Minutes 3-6)</td>
<td>Here is a current issue. We need your consensus before we go to the next Association meeting where we will submit your collective views.</td>
<td>The mere process of getting members’ consensus reinforces in the member’s mind that their opinion is actively sought and presented to the voting body. If you neglect this step, you may have mistrust and hostility from your members.</td>
</tr>
<tr>
<td>3 Minutes (Minutes 7-9)</td>
<td>A 3-minute review of a current issue that is close to the heart and soul and guts of members in this building.</td>
<td>This may not be the burning issue that came up at the Association/Rep Assembly meeting, but the members need to feel that the Association is conscious of their needs. The individual member needs to have time spent on a topic that is important to him or her.</td>
</tr>
<tr>
<td>1 Minute (Minute 10)</td>
<td>We’re having some success in this area, or we’re optimistic in this area, due to your efforts. Keep up the good work!</td>
<td>Praise, encourage, nourish the members toward developing a spirit of optimism. An “all is lost” attitude will eventually kill support for the Association’s goals — especially during negotiations.</td>
</tr>
</tbody>
</table>

Time’s up! We told you we could do it in 10 minutes!
Don’t forget to leave your questions and suggestions at the door.
Communications Skills Workshop

OBJECTIVES OF THIS WORKSHOP
(Visual 1)
• To learn how to develop your message
• To understand some elements of Association reports and publications

RULES OF MESSAGE DEVELOPMENT
(Visual 2)

1. Never allow others to define you or your objectives.
   It is vital that you formulate your message at the very beginning of an initiative. Whether it is for a meeting, an action, or a long-range plan, take the time to get your message straight first. This will do three things:
   • It will clarify to whom you are speaking.
   • It will help to clarify where you think you are going.
   • It will give you the advantage of defining the issue first.

The first message to get out there is usually the one that is remembered.

If you allow your adversaries to define the issue first, you usually are then stuck with that framework. It becomes extremely difficult to change the message once it’s been defined.

More importantly, if they define you and your issue, you have lost two vital advantages. You have lost your own agenda and you have lost momentum.

Both are very nearly impossible to get back. It may require a new beginning to the issue, which may be more difficult or risky. Not necessarily impossible—just messier. So go for the gold and define and frame the message first.

2. Know your audience.
   Knowing who your membership really is, and what it is they really do in the school district, goes a very long way to formulating a successful message. No matter what the message is for—a campaign, an action, an election, a meeting—understanding your most important audience, your members, is always the place to go first.

If the message is irrelevant to the audience, there is no way it will get listened to.

3. Speak their language.
   If you understand your membership (or whomever your audience is going to be), you can better communicate with them by speaking in language they can relate to and understand.

Saying something the way you want to—“circles,” for instance—may be perceived by them as “squares.” Your message has failed.

When developing a message, always think in terms of “with” rather than “to” or “at.” You’ll have a better chance of delivering a message within the experience of your audience. You’ll send “circles,” and they’ll receive “circles.”

ELEMENTS OF MESSAGE DEVELOPMENT

1. What is the goal of the message? Ask who, what, why, where, how often, what timeline, who is impacted, and when is the end? Then attempt to answer these questions in 10 words or less.

2. Clarify your goal with analogies, anecdotes, and supporting materials and information that will help build your message. Figure out what is relevant and discard the rest.

3. Identify what your program (agenda, activity, position) would do to make things better for your membership. What do you visualize as the point of your message?

4. Synthesize and prioritize this information into three or four statements of purpose. Now that you have statements of purpose, you are prepared to write your message.

5. Make sure your message is not just a slogan. For example, “Children, Quality, and The Future” is an empty slogan. It doesn’t indicate any action that will be taken. If you have nothing substantial to say, don’t say anything. Go back to the drawing board because your message is not ready yet. A better message would be, “ESP—One Education Workforce Serving the Whole Student.”
6. Always collect data and information to support your message once it is out there.

**MESSAGE DEVELOPMENT EXERCISE** (10 minutes)
Develop a three-minute presentation using the elements of message development. (Be prepared to present to the group.)

**WATCH YOUR LANGUAGE**
Each of the words in the below should evoke some response in your audience. Think about how you feel about them as you formulate your message. A simple word change can dramatically alter how an audience reacts to a particular issue.

<table>
<thead>
<tr>
<th>Affirmative Words</th>
<th>Critical Words</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement</td>
<td>Betray</td>
</tr>
<tr>
<td>Ambition</td>
<td>Big Money</td>
</tr>
<tr>
<td>Balanced</td>
<td>Bosses</td>
</tr>
<tr>
<td>Bold</td>
<td>Bureaucratic</td>
</tr>
<tr>
<td>Caring</td>
<td>Cheap</td>
</tr>
<tr>
<td>Challenging</td>
<td>Corruption</td>
</tr>
<tr>
<td>Common Sense</td>
<td>Collapse</td>
</tr>
<tr>
<td>Courage</td>
<td>Crisis</td>
</tr>
<tr>
<td>Dream</td>
<td>Deals</td>
</tr>
<tr>
<td>Duty</td>
<td>Decay</td>
</tr>
<tr>
<td>Empowerment</td>
<td>Destroy</td>
</tr>
<tr>
<td>Excellence</td>
<td>Disgrace</td>
</tr>
<tr>
<td>Fair</td>
<td>Excuses</td>
</tr>
<tr>
<td>Family</td>
<td>Exclude</td>
</tr>
<tr>
<td>Focused</td>
<td>Failure</td>
</tr>
<tr>
<td>Freedom</td>
<td>Fixes</td>
</tr>
<tr>
<td>Goals</td>
<td>Foot dragging</td>
</tr>
<tr>
<td>Hard Work</td>
<td>Gang</td>
</tr>
<tr>
<td>Leadership</td>
<td>Greed</td>
</tr>
<tr>
<td>Mainstream</td>
<td>Half-baked</td>
</tr>
<tr>
<td>Merit</td>
<td>Hidden</td>
</tr>
<tr>
<td>Passionate</td>
<td>Hypocrisy</td>
</tr>
<tr>
<td>Positive</td>
<td>Incompetent</td>
</tr>
<tr>
<td>Quality</td>
<td>Irresponsible</td>
</tr>
<tr>
<td>Reform</td>
<td>Manipulation</td>
</tr>
<tr>
<td>Resolve</td>
<td>Narrow</td>
</tr>
<tr>
<td>Results</td>
<td>Power Grab</td>
</tr>
<tr>
<td>Rights</td>
<td>Red Tape</td>
</tr>
<tr>
<td>Right Track</td>
<td>Special Interests</td>
</tr>
</tbody>
</table>

**ASSOCIATION PUBLICATIONS**

**VISUAL 3**

TEN TIPS FOR EFFECTIVE ASSOCIATION NEWSLETTERS
1. Give the readers a direct voice.
2. Establish an Activist Highlight or Alert section.
3. Stress member activities and people.
4. Establish a New Member column.
5. Have a regular President’s Message or From Your Executive Board section.
6. Follow up on previous events.
7. Publish on a regular schedule.
8. Establish an identity block. Who are we?
   - official address
   - list of officers
   - editor and staff
   - when and how published
   - phone numbers, e-mail and website
9. Highlight all scheduled meetings in a consistent format every issue.
10. Make your publication as professional looking as possible.

Most of this information can be effectively presented in a regular newsletter. Here are some tips for producing an effective Association publication:

1. **Give the readers a direct voice.** Provide a regular Members Speak Out column or Letters to the Executive Board or President section.
2. **Establish an Activist Highlight or Alert section** to bring attention to planned or ongoing actions.
3. **Stress member activities and people.** Use photos of members in action whenever possible.
4. **Establish a New Member column.**
5. **Have a regular President’s Message or From Your Executive Board section.** Leaders should communicate directly to members in every issue.
6. **Follow up on previous events.**
7. **Publish on a regular schedule.**
8. **Establish an identity block.**
9. **Highlight all scheduled meetings** in a consistent format every issue.
10. **Make your publication as professional looking as possible.**
Write a paragraph or two about your Emerging Leaders Training experience to be published in your Association newsletter and/or city newspaper.

See Communications Handout A for suggested content of a report to members.

21ST CENTURY COMMUNICATIONS

The turn of the 21st century was accompanied by a global turn toward technology. It’s not a foreign idea any longer for people around the world to connect to the internet using only a handheld smart phone. What once took a bulky home computer, a phone line and 10 minutes of painful page uploads now takes a mere push of a phone button or click of a mouse. Today, Facebook, Twitter and YouTube are replacing newspapers, magazines and television. This changing environment requires a change in thinking for marketers wishing to continue to capture consumers’ attention. The same is true for Association leaders hoping to connect with the 21st century member. In order to stay connected, you have to be where the members are.

Social networking allows you to connect ideas, people, and organizations and move them to action. Being an online activist allows you as an Association leader to spearhead member engagement in multiple ways. Remember to do your research on the best social media platform to use for each planned event. Using Twitter as a social media platform and expecting in-depth dialogue you would normally see in Facebook is like trying to get a glass of lemonade from freshly squeezed apples.

What is Facebook?

Facebook is a social media tool that allows a user to share news, videos, and other files with “friends” of their page. The initiating user can make comments about the shared item that will be seen and “friends” of the page can comment in return. It allows for open dialogue to continue in real time. Facebook also has a Groups feature. This allows the user to connect to “friends” by interests. The Groups feature also allows the user to announce or organize upcoming events. Groups can be set up to be “private,” which require an invitation for viewing, or “public,” for all to see.

What is Twitter?

One dictionary defines “twitter” as a bird call consisting of repeated light tremulous sounds. The social media platform Twitter works in the same way. Twitter is a real-time network that connects users to the latest information about what they find interesting with the speed and frequency of a text message. Information is pushed through the system in small bursts called “Tweets.” Tweets are restricted to 140 characters in length and can be highlighted with the use of photos, videos and other media content.

What is YouTube?

YouTube, the most popular video sharing website, allows users to upload and share videos globally. It has become one of the most prominent “how to” sites for the online user looking to learn a new skill. It has also been frequented by users wanting to obtain important information, or just to view something entertaining. Creating a YouTube account, also known as a “channel,” is free and takes only a few minutes. (Note: the “channel” piece of your account generally refers to the parts of your account that you have chosen to make public.) Video uploads are required to be 10 minutes or less, no more than 100 MB, and are searchable by keyword, topic, viewer favorites or new uploads. Although this is generally used as a public site, there are features that allow you to make your videos private for select groups. Video content is open to user discretion as long as it does not portray graphic sex or violence. Many Associations have effectively created their own “channels” to post videos of rallies, speeches, meetings, events and informational videos about various member groups.

Hints for effective use of social media

Here are a few points to consider when deciding whether to take advantage of social media platforms.

- Lack of communication and member knowledge equals a lack of member support.
- What works for one Association’s members may not work for yours. Do your research!
- Organizing is no longer done just face-to-face. Think of yourselves as “Online Community Organizers.”
- Be very specific in your selection of social media platforms and realistic about the desired outcome.
- Don’t allow your lack of social media knowledge to intimidate you from using it.
- Remember cell phone technology! In 2010 it was reported that 4.6 billion people worldwide use a cell phone. Most social media platforms today have been simplified so that they can be used even on a cell phone. Talk about reaching the masses!
- Remember, don’t over think technology; let it do the thinking for you!
Objectives of This Workshop

- To learn how to develop your message
- To understand some elements of Association reports and publications

Rules of Message Development

1. Never allow others to define you or your objectives.
2. Know your audience.
3. Speak their language.
Ten Tips for Effective Association Newsletters

1. Give the readers a direct voice.
2. Establish an Activist Highlight or Alert section.
3. Stress member activities and people.
4. Establish a New Member column.
5. Have a regular President’s Message or From Your Executive Board section.
6. Follow up on previous events.
7. Publish on a regular schedule.
8. Establish an identity block.
9. Highlight all scheduled meetings.
10. Make your publication as professional looking as possible.

Using Social Media Effectively

- Social media can develop “online community organizers.”
- Choose your social media platform according to your desired results.
- Be realistic about what it can and can’t accomplish.
- Don’t be intimidated by new technology.
- There are billions of cell phones out there. Take advantage of them!
Membership Recruitment Skills Workshop

OBJECTIVES OF THIS SECTION
(Visual 1)
• To provide emerging leaders with tools and techniques for effective recruitment of new members

WHY BELONG TO THE ASSOCIATION?
(Visuals 2 and 3)
• Protection
• Professionalism
• Benefits and special services

A strong local has maximum membership, and it’s a leader’s job to build that membership base. Without strength in numbers, the rights and benefits we enjoy could be taken away from us.

Handout 3A describes 38 reasons to join the Association. These can be used in flyers, promotional material, and, of course, in your one-on-one talks with prospective members.

DO’S AND DON’T’S FOR MEMBERSHIP DRIVES
(Handout 3B)

Do’s—
• Always have a membership form with you.
• Know your prospective member.
• Make appointments to discuss membership when possible.
• Ask questions designed to involve the prospective member in thinking about membership.
• Listen carefully to what the prospective member is saying to you.
• Stick with a key issue you can identify that concerns them.
• Express your own personal passion about membership, but also show respect for the prospective member’s views.
• Be prepared to answer predictable questions.
• Work in pairs.
• Enlist help from members who know the prospective member well.
• Ask for suggestions for improving the organization. Take notes.
• Make an appointment for another time before leaving if you can’t get membership at the first discussion.
• If a person signs up, immediately tell about a meeting or activity to attend or committee to join.
• Agree to provide additional information to a prospective member at a next appointment if they have questions.
• Make sure to arrive with that information at the next appointment.

DON’Ts
• Don’t flatly contradict the recruit. Turn it to a positive—“That seems to be a common misconception. Actually, the Association does…”
• Never argue or raise your voice. Your point is to get them to join, not to alienate them.
• Don’t give up after one try. Keep trying. If you believe membership is important, invest the time to convince them.
• Don’t beg for membership.
• Don’t be afraid to ask someone to join. Whether they know it or not, you are offering them a very important opportunity.
• Never discuss personalities. Remain professional at all times.
• Never embarrass your prospective member in front of others. Ridicule never works.

ANSWERING THE HARD QUESTIONS

There are always some individuals who won’t even consider joining their professional organization. When you try to recruit them, they’ll come up with any number of reasons to resist your efforts.

An effective leader/recruiter needs to know how to respond to their objections. Handout 3C, “Answering the Hard Questions,” poses some frequent excuses and suggests ways to respond.

The “Feel, Felt, Found” approach to recruiting members is one way to connect with prospective members who ask the hard questions.

(Pass out the “Feel Felt Found materials — Handouts 3D and 3E — and role play this recruitment skill.)

Pass out the Membership Recruitment Assessment (Handout 3F)

and have the participants complete the form and then discuss the results.

Select one of the answers to the hard questions and employ the “Feel, Felt, Found” approach to recruiting members.

MEMBERSHIP ASSESSMENT EXERCISE

• Have you met any non-members face to face?
• Do you know who the non-members are at your worksite?
• Have you spoken personally with those non-members?
• Are there potential members you can contact in order to take advantage of the member sign-up promotion?
• Have you asked others to help with membership recruitment?
• Have you delegated any responsibilities?
• Have you personally asked another member to maintain a member bulletin board for recruitment?
• Have you scheduled and called a regular worksite meeting for membership recruitment?
• Do you have an agenda, a plan, and materials for each member or non-member who shows up?
• Do you have membership forms with you at all times?

MEMBERSHIP RECRUITMENT SKILLS WORKSHOP
Objectives of This Section

- To provide emerging leaders with tools and techniques for effective recruitment of new members

Why Belong to the Association?

- Protection
- Professionalism
- Benefits and special services
NEA Protects Member Rights and Benefits

- No benefits or rights are ever offered freely.
- All benefits and rights can be taken away—they need to be protected.
- No benefits or rights will be given freely in the future without pressure.

38 Reasons to Join Your Local Association

1. Your local Association is the professional association for the members.
2. Your local Association determines your working conditions and salary through negotiations or advocacy at the local and state level.
3. Your local Association is recognized by the School Board and the community as the voice of the members.
4. Your local Association promotes professional excellence for members and high quality instruction for students.
5. Local Association staff and leaders are readily available throughout the year to assist members with problems and concerns whenever they arise.
6. Your local Association offers members protection from arbitrary, unjust, or capricious treatment.
7. Your local Association represents members with grievances.
8. Local Association members are assured that their professional concerns are heard by the administration.
9. Your local Association sponsors conferences and workshops to address professional issues such as discipline and member rights.
10. Your local Association provides regular publications to keep members informed of educational developments and Association activities.
11. Your local Association provides research and training for local efforts.
12. Your local Association promotes human and civil rights in education and in society.
13. Your local Association provides in-depth information on current legislation and educational issues.
14. Your local Association supports pro-education candidates for office through our Political Action Committee.
15. Your local Association lobbies for pro-education legislation in the state capital and in Washington.
16. Your local Association brings members’ professional concerns to the attention of the legislature.
17. Your local Association monitors implementation of education legislation.
18. Your local Association monitors local compliance with state and federal legislation.
19. Your local Association needs membership support for political power.
20. Your local Association can assist members in organizing around issues of concern to them.
21. Your local Association provides retirement workshops for members.
38 reasons to join, continued

22. Your local Association provides members with comprehensive legal assistance in employment-related areas.
23. Local Association members are protected with $1,000,000 professional liability insurance.
24. Your local Association provides an Attorney Referral Program for personal legal problems.
25. Local Association members can take advantage of the Member Benefits provided through NEA.
26. Local Association members can borrow money under easy credit plans set up especially for members.
27. Local Association members are entitled to special rates on VISA and MasterCard.
28. Your local Association offers insurance coverage at special rates geared specifically for members’ needs: life, hospitalization, income protection, mortgage protection, etc.
29. Local Association members can participate in a tax-sheltered annuity program.
30. Local Association members receive special discount rates on car rentals.
31. Local Association members are entitled to travel discounts.
32. Your local Association provides a discount vision program for all members.
33. Your local Association provides members with an assault protection program.
34. Your local Association is a democratic organization which promotes members’ input through a network of Faculty Reps/Building Reps in each school and Area Directors who serve on the Board of Directors.
35. Local Association members are affiliated with the largest education organization in the state.
36. Local Association members are affiliated with the NEA, the largest and most highly respected educational organization in the country.
37. Your local Association has CLOUT!
38. You are your local Association.

Do’s and Don’ts for Membership Drives

**DOs**—
- Always have a membership form with you.
- Know your prospective member.
- Make appointments to discuss membership when possible.
- Ask questions designed to involve the prospective member in thinking about membership.
- Listen carefully to what the prospective member is saying to you.
- Stick with a key issue you can identify that concerns them.
- Express your own personal passion about membership, but also show respect for the prospective member’s views.
- Be prepared to answer predictable questions.
- Work in pairs.
- Enlist help from members who know the prospective member well.
- Ask for suggestions for improving the organization and take notes.
- Make an appointment for another time before leaving if you can’t get membership at the first discussion.
- If a person signs up, immediately tell about a meeting or activity to attend or committee to join.
- Agree to provide additional information to a prospective member at a next appointment if they have questions.
- Make sure to arrive with that information at the next appointment.

**DON’Ts**—
- Don’t flatly contradict the recruit. Turn it to a positive—“That seems to be a common misconception. Actually, the Association does…”
- Never argue or raise your voice. Your point is to get them to join, not to alienate them.
- Don’t give up after one try. Keep trying. If you believe membership is important, invest the time to convince them.
- Don’t beg for membership.
- Don’t be afraid to ask someone to join. Whether they know it or not, you are offering them a very important opportunity.
- Never discuss personalities. Remain professional at all times.
- Never embarrass your prospective member in front of others. Ridicule never works.
Answering the Hard Questions

There always seems to be a few individuals who traditionally refuse to consider joining their professional organizations. They come up with a multitude of reasons, all logical to them. To do a successful “selling” job on membership, you need responses to these reasons.

Here are some of the responses you can use to statements frequently given by individuals for not joining. Feel free to use them as you talk to people about becoming Association members.

"THERE ISN’T ANY REASON FOR ME TO JOIN. I WILL GET ALL THE NEGOTIATED SALARY AND BENEFITS ANYWAY."

Maybe. School boards want to know how many employees the Association represents. Representing some of the workforce isn’t enough. Sixty percent isn’t enough. Is the negotiations team representing the overwhelming majority, if not all, of the employees? If not, we all might lose in negotiations. Joining shows the school board that employees are together behind our negotiators.

Secondly, don’t you feel a little guilty about being a freeloader? Yes, I said a freeloader. You know how much work some of the leadership puts in on negotiations and on representing you at meetings. What do you give them in return? Isn’t it about time you pulled your own weight?

"MY SPOUSE ALSO WORKS IN THE SCHOOL SYSTEM. WHY SHOULD WE PAY DOUBLE DUES?"

Both of you need to join because you’re guaranteed double benefits if you do. Membership isn’t unlike an insurance policy. If one of you has an accident, it doesn’t help if the other is covered. The same thing applies if one of you needs assistance from the Association. Membership benefits come with membership only. Unless both of you join, you are only giving half of your support to your own cause.

We need strength and numbers to be successful. Both of you have a big stake in the success of your Association. Both of you should support it.

"I DON’T AGREE WITH A LOT OF THINGS THAT THE ASSOCIATION DOES."

Fine! That’s your privilege. But can you honestly say that you agree 100% with every activity of every organization to which you belong? If not, do you withhold your membership or do you give up your voting rights? Why don’t you get active and help change the things you don’t agree with?

"I DON’T SEE WHAT THE STATE ASSOCIATION OR THE NATIONAL ORGANIZATION DOES THAT THE LOCAL ASSOCIATION CAN’T DO... AND I’D RATHER SPEND MY MONEY FOR A LOCAL ASSOCIATION."

A great deal of the information used by local Associations is obtained (without charge) from your state and national organizations. Presumably someone could be employed to gather these statewide statistics, but I doubt that many would want to foot the bill.

If the local Association were to attempt to provide legislative contacts, local dues would be much higher — and just “writing letters to your legislative representative” does not produce legislation. It takes a powerful legislative lobbying effort, which is provided by your local, state, and national organizations. And then there are field services, publications, special services, and more.

"I HAVEN’T GOT A VOICE IN WHAT THE ASSOCIATION DOES."

Wrong. You have a voice and a vote every time your Local takes action. This Association prides itself on being democratic, and ensures fair representation for all its members.

"WHAT DO THE NATIONAL ORGANIZATIONS DO FOR OUR STATE?"

NEA is directly involved in providing a variety of programs and benefits to our members. NEA’s KEYS program is a union-sponsored, research-based school improvement program. NEA also offers special services, membership promotion workshops, public relations support, negotiations workshops, and much, much more.

"I JUST DON’T BELIEVE IN JOINING ANYTHING."

If that were how everyone felt, we’d still be paying taxes on tea from England. Until employees organized, how many were dismissed for unfair reasons? Until employees organized and negotiated locally, where were salaries and benefits going? Until employees organized and entered the political arena, how many “letter writing campaigns” ended up in legislative wastebaskets?

While many people philosophically don’t like to join organizations, not too many people want to turn back increases that Association negotiations and lobbying have won. In short, most people would prefer to have it both ways — get the benefits without the membership fee.

Maybe it’s time you gave some thought to supporting the organization that supports you in almost everything that affects your career.

"I CAN’T AFFORD IT."

Most occupation groups pay dues that are more than twice ours, even when employees earn considerably less. They do it because they realize that dues are an investment in their future welfare.

As a matter of fact, professional dues for the entire year are more than paid for by the salary increase won by Association action the first month of employment. Association dues are less than $2 per day — for free legal protection, negotiations service, discount economic services, and many other services. That’s a pretty small investment.
In fact, many members who take advantage of the Association’s special service programs are making up all or most of the cost of their dues in money savings, not mention higher salaries and better fringe benefits. They can’t afford not to join.

“WHY ARE DUES SO EXPENSIVE?”

“You get what you pay for” and members are getting a good program. Specifically, the program provides services to its members—such as legal assistance, negotiations assistance, retirement consultation, and special service programs.

When we tell the school board our salaries have to go up to meet inflation, we have to be ready to see our own organization’s costs go up, and they have.

“I DON’T BELIEVE SCHOOL EMPLOYEES SHOULD BE INVOLVED IN POLITICS.”

You have a right to believe that, and you have a choice whether you want to contribute to the political action arm. Other employees who feel as you do join the organization, but don’t support political activity. The important thing, however, is that they are staying in the organization and supporting not only other employees but themselves.

You should know, too, that whether we like school employees in politics or not, it’s making a difference. Our members are being appointed to statewide committees and commissions. The political action arm is proving that you only make things better when you work to make them better. Staying out of the system means you are ignored by those in the system—and we do not want to be ignored by politicians.

FINALLY, CONSIDER SOME ARGUMENTS FOR THE CHRONIC NON-JOINER.

Every non-member gives the school boards some hope that employees really aren’t behind the bargaining team. That can hurt everyone. It can mean the difference between an agreement reached reasonably and a possible impasse while the board tests the unity of the employees.

Individuals who do not join are freeloaders off members who do. Those in the school system who pay and support negotiations services also pay to support salary gains for non-members. If non-members don’t want to join, would they be willing to turn their salary gains back to the Association to be distributed to the members who paid the freight?

At some point, straight talk is needed with the chronic non-joiner. Whether that non-joiner wants to admit it or not, he or she is a parasite living off the commitment of members paying to support a strong organization. Whether they want to admit it or not, they are a possible reason why local school boards feel they can ignore legitimate employee demands.

The last thing a non-member ought to consider is the whole question of dropping out. We criticize students and others for dropping out, why not apply the same criteria to ourselves? If you don’t like what the organization is doing, get inside and try to change it. If you drop out and pout, you just silence one more voice that could change the direction of the organization.

In short, we’re all in this together, and the decision of one person to stay out of the organization has an impact on all of us. Maybe it’s time we made that clear to non-members.
Using the “Feel, Felt, Found” Approach to Recruiting Members

We have learned from experience that pamphlets, promotional materials, and flyers do not recruit members. People recruit members. Association representatives and recruiters across the country have discovered that the “Feel, Felt, Found” method of recruiting is very successful and simple to master.

**HERE’S HOW IT WORKS**
If you approach a potential member with the normal opening, “I’d like to take a few minutes to tell you about the ___________________________ Association of Educators,” and are met with “I really don’t see any real reason to join,” use the following to keep the conversation going:

- I know how you FEEL.
- I have FELT the same way myself.
- But I have FOUND that ...

With this technique you will be able to customize the message for the individual you are recruiting. You also let them know that their concerns are important to you and the Association.

There are other ways to say the same thing but still use the recruiting technique, such as:

- I know how you FEEL ...
  - I know what you mean.
  - I understand what you’re saying
  - Restate the objection by saying:
    - Do I understand your feelings?
    - I sense you are saying...
    - It appears that you feel...

- I have FELT the same ...
  - Initially I felt...
  - My first impressions were...
  - In the beginning, I believed...
  - There was a time when I...
  - Earlier in my career I shared that view.

- But, I have FOUND...
  - Realized
  - Learned
  - Became aware that...
  - As I became involved...
  - As I learned more about the Association...
  - When I examined the issue further...
  - As I obtained more information...

Recruitment Skill Practice:
Role Play Using “Feel, Felt, Found”

**Recruiter:** Hello, ___________________________________________. Thanks for finding a few minutes to talk with me this morning. I want to invite you to join our County Education Association.

**Potential:** Well, I’m so busy right now trying to get ready for the students and we’re so busy with paperwork and meetings that it’s hard to get everything finished. Anyway, I’ve always felt that the dues were just too high. I just can’t afford them.

**Recruiter:** I know how you feel, every year it seems like there is more and more to do and less and less to do it with. I also understand what you mean about the dues. I felt that way initially, too. But what I found out was that I couldn’t afford not to join. In fact, Association dues come to less than $2 a day. That’s less than I put in the cola and snack machine. And for free legal protection, negotiation services, the professional development offered, discounts for members only, and many other services, that’s a pretty small investment.

**Potential:** Well, I’ll have to think about it. I hadn’t looked at it quite like that.

**Recruiter:** That’s fine for now. But, I promise you...I’ll ask again. It’s our Association that’s going to make good things happen for both the kids in our schools and us. We really need you on board with us to help make them happen.
HANDOUT 3F

Membership Recruitment Assessment

Rate yourself 1 to 10 on each question. (Assume you are either an elected officer or Association representative of the local.)

☐ Have you met any non-members face to face?

☐ Do you know who the non-members are at your worksite?

☐ Have you spoken personally with those non-members?

☐ Are there potential members you can contact in order to take advantage of the member sign-up promotion?

☐ Have you asked others to help with membership recruitment?

☐ Have you delegated any responsibilities?

☐ Have you personally asked another member to maintain a member bulletin board for recruitment?

☐ Have you scheduled and called a regular worksite meeting for membership recruitment?

☐ Do you have an agenda, a plan, and materials for each member or non-member who shows up?

☐ Do you have membership forms with you at all times?

APPENDIX A

Short History of the NEA

1857  NEA founded as National Teachers Association
1861  Ohio Colored Teachers’ Association formed in Springfield, Ohio—first recorded organization of black teachers
1866  Women admitted to full membership in NTA
1870  NTA becomes National Education Association
1884  Booker T. Washington addresses the 5,000 member annual meeting in Madison, Wisconsin
1898  NEA employs first full-time executive secretary
1904  National Association of Teachers of Colored Schools
1905  First NEA salary study published
1906  NEA gets charter by Act of Congress
1908  NEA creates the NEA Department of National Women’s Organizations
1910  Ella Flagg Young first female president of NEA
1912  NEA endorses women’s suffrage
1913  Department of Classroom Teachers established
1914  NEA passes a resolution supporting equal pay for equal work
1917  NEA moves to Washington, D.C.
1920  NEA Representative Assembly established
1921  First NEA Representative Assembly held
1921  NEA Journal begins publication
1922  NEA Research established
1926  First NEA/NATCS Joint Committee
1937  NATCS becomes American Teachers Association
1941  NEA President DuShane establishes Defense Committee
1943  Kate Frank wins her case against Oklahoma School Board
1944  GI Bill passed
1954  Brown v. Topeka Bd of Ed Supreme Court Desegregation Decision
1957  NEA Centennial
1959  First State Public Employee Bargaining Law in Wisconsin
1960  NEA begins organizing higher education faculty
1962  First Negotiation Resolution passed
1966  NEA and ATA merge
1968  Libby Koontz first African American NEA President
1970  UNISERV Program established
1971  NEA Constitutional Convention
1972  NEA Representative Assembly votes formal support for passage of the Equal Rights Amendment
1974  NEA sets procedures for Presidential candidate endorsement
1975  NEA establishes special membership category for paraprofessionals—name is subsequently changed to Education Support Personnel (ESP)
1976  NEA helps elect Jimmy Carter U.S. President
1979  Department of Education established by Carter
1980  Education Support Personnel (ESP) are voted full membership rights in NEA by the Rep Assembly
1982  The NEA-Retired program is instituted
1984  NEA publishes Open Letter to American Public
1984  NEA fights for and wins passage of a federal retirement equity law that provides the means to end sex discrimination against women in retirement funds
1985  NEA member and social studies teacher Christa McAuliffe, who was the nation's first teacher in space, dies on the Challenger. NEA creates the Christa McAuliffe Education Fund, which provides grants to teachers to experiment with imaginative teaching approaches or to study for the purposes of professional growth.
1992  NEA lobbies successfully to pass the Civil Rights Act, which protects individuals against on-the-job harassment and discrimination, and allows victims of employment discrimination to collect compensatory damages.
1997  Iona Holloway of Louisiana is elected to the NEA Executive Committee, becoming the first ESP member elected to this office.
1997  NEA President Chase pushes New Unionism
1998  Merger with AFT debated
2001  Congress passes the No Child Left Behind Act – a reauthorization of 1965's ESEA
2001  NEA Representative Assembly passes resolution officially changing Education Support Personnel to Education Support Professional
2002  NEA Representative Assembly votes to adopt a new Education Support Professional Quality Department, separate from its original parent department, Affiliate Capacity Building
2006  NEA membership surpasses 3 million
2007  Paula Monroe of California is elected to the NEA Executive Committee, the second ESP to hold that office
2008  NEA helps elect Barack Obama U.S. President
2009  ESP membership tops 500,000. Gail Rasmussen is elected President of the Oregon Education Association, the first ESP to hold the top state affiliate position
2011  Congress passes Healthy and Hunger Free Kids Act, reauthorizing funds for child nutrition and providing for training for food service workers

APPENDIX

APPENDIX B

Acronym Answer Sheet

NEA — National Education Association
NEA-FC — NEA Fund for Children
AR — Association Representative
RA — Representative Assembly
HCR — Human and Civil Rights
PR — Public Relations
MIP — Minority Involvement Program
ESP — Education Support Professionals
RIF — Reduction in Force
AAA — American Arbitration Association
AFL-CIO — American Federation of Labor-Congress of Industrial Organizations
NEA-R — National Education Association-Retired
AFT — American Federation of Teachers
NCESP — National Council for Education Support Professionals
PR&R — Professional Rights and Responsibilities
BOE — Board of Education
GR — Governmental Relations
NCUEA — National Council of Urban Education Associations
NLRB — National Labor Relations Board
EEOC — Equal Employment Opportunity Commission
ENESC — Educators Employment Liability
PAC — Political Action Committee
FLSA — Fair Labor Standards Act
FMLA — Family Medical Leave Act
SB — Senate Bill
UD — UniServ Director
HB — House Bill
HR — Human Resources
NAPE — National Association of Professional Educators
NEASP — National Education Association Student Program
LFT — Leaders for Tomorrow
ACT — Association of Classroom Teachers
LCT — Legislative Contact Team
ELS — Emerging Leaders School
GOTV — Get Out The Vote
UEP — United Education Profession
NFIE — National Foundation for the Improvement of Education
HE — Higher Education