HANDOUT

CHECKLIST: Preparing for the Presidency

D = Done; DS = Do Soon; DL = Do Later; X = Don't Need to Do

Transition Stage

____ I have met with our outgoing president regarding projects that need completion.

____ I have met with the other incoming Chapter officers, and we have developed written outlines regarding our roles for the coming year.

____ I have met with our Chapter's Primary Contact Staff person.

____ I have familiarized myself with the rules for conducting meetings (parliamentary procedures) and am confident that I can run our meetings skillfully and fairly, even if debate becomes heated.

____ I have reviewed the minutes of last year's Chapter meetings, know the major positions taken, and have identified carryover tasks that need to be completed.

Personal Planning

____ I have discussed fully with those in my personal life the responsibilities of my role as president and we have attempted to resolve any problems we foresee.

____ I have prepared a daily schedule for myself, budgeting reasonable time for my school and Association duties, my family and myself.

____ I have familiarized myself with the contents of this *Handbook* and believe I understand the importance of delegating responsibility to other capable leaders and how to get help when I need it.

Program Planning

____ In consultation with our Chapter's executive group (officers or board of directors), I have developed a calendar for the coming year.

____ In consultation with the executive group, I have reviewed our committee structure, identified those that will continue to function, and recruited an able leader for each committee.

____ I have conferred with each committee leader, and we have identified the goals for the committee, target dates for achievement of the various goals, and procedures for reporting progress.

____ I have entered all task completion deadlines into my calendar so I may ensure each project is on schedule.

____ I have familiarized myself with the financial status of our Chapter, our bookkeeping system and our budget and have attempted to ensure that sufficient funds will be available to carry out our programs.

HANDOUT

CHECKLIST: Preparing for the Presidency (continued)

D = Done; DS = Do Soon; DL = Do Later; X = Don't Need to Do

Legal and Contractual

____ I have familiarized myself with the Educational Employment Relations Act ("EERA") and I understand what the duty of fair representation imposes on our Chapter.

____ If the Chapter's gross receipts normally exceed $25,000 annually, we have filed an application for nonprofit status (unless such status has already been obtained) and filed annual tax information returns with both the State Franchise Tax Board and the Internal Revenue Service.

____ I have knowledge of our contract and have consulted with members of the bargaining team about its content and intent.

____ I have identified a sufficient number of leaders to provide representation to unit members at meetings with district administration.

____ I have identified a sufficient number of grievance representatives to represent unit members at each stage of the grievance procedure up to arbitration and planned appropriate grievance training.

Governance Documents

____ I have at least one copy of our Chapter's governance documents (Articles of Incorporation or Constitution, Bylaws, and/or Standing Rules) and have carefully read them.

____ I take copies of our governance documents with me whenever I attend Chapter meetings so that I can refer to them as needed.

____ Our Chapter's governance documents are consistent with CTA and NEA requirements (as listed in the *CTA Requirements for Development of Bylaws and Standing Rules for Chartered Chapters,* available online in Leader Resources).

____ Our governance documents have been reviewed by CTA's committee to review local governance documents within the past five years.

____ If our governance documents need revision, I have delegated this task to a person or committee.