HANDOUT

Chapter Yearly, Month-to-Month Program Calendar

PLANNING AHEAD

This sample calendar of activities should be modified in accordance with local needs and conditions. Use it as a point of departure in beginning general planning; scan it each month as the year progresses. Consult the CTA/NEA and district calendars to avoid conflicts.

At the beginning of the membership year:

- Hold organization meeting of the Executive Board.
- Complete appointment of committee leaders.
- Hold initial planning meeting of officers, chairpersons, and executive board members. Prioritize the agenda items for the upcoming year.
- Instruct and delegate responsibilities to chairpersons.
- Put CTA Primary Contact Staff person on the mailing or email list for all chapter newsletters, publications, reports, activities, projects, etc.
- Establish calendar for all Association activities.
- Take note of all deadlines related to legal and financial obligations.

Some suggested general items for inclusion in the calendar are:

Chapter, State, and National Association Meetings

- ☐ General chapter meetings and annual meeting, if any
- ☐ Executive Board and/or Rep Council meetings
- ☐ CTA State Council meetings
- ☐ Community College Association meetings
- ☐ Service Center Council meetings
- ☐ Committee meetings
- ☐ Special forums for members and/or public

Elections

- ☐ District School Board election
- ☐ CTA State Council elections
- ☐ Statewide and local elections
- ☐ Election of officers
- ☐ Report of NEA delegate(s)
- ☐ NEA delegate election

Local, State, and National Associations Conferences

- ☐ Workshops (Sponsored by local Association)
- ☐ CTA and NEA sponsored conferences
- ☐ Committee workshops
- ☐ Membership workshops
- ☐ Regional Resource Center or UniServ conferences and workshops



Chapter Yearly, Month-to-Month Program Calendar

- ☐ Faculty representative workshop(s)
- ☐ Regional leadership conference(s)
- ☐ Presidents Conference
- ☐ Summer Institute
- ☐ Grievance rep workshop(s)

Negotiations

- ☐ Negotiations, Organizing, Contract or Site Action Team, etc. team selection and training
- ☐ Contract needs survey and site visit plan
- ☐ Coordinated Bargaining group
- ☐ Preparation of contract proposal to District governing board
- ☐ Target date for contract settlement including backwards planning

District and Community Events

- ☐ Meetings with civic groups
- ☐ District board meetings
- ☐ PTA meetings (if district-wide)
- ☐ Semester or Trimester dates
- ☐ School/Department meetings

Miscellaneous Dates

- ☐ New teacher welcome and recruitment event
- ☐ Public Schools Week
- ☐ American Education Week
- ☐ Newsletter publication dates
- ☐ Social events
- ☐ Education-Community Day
- ☐ Community progress reports
- ☐ Vacations and holidays
- ☐ Awards programs
- ☐ Community Newsletter publication dates
- ☐ Compliance deadline for governance documents*

HANDOUT

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MONTH – BY – MONTH CALENDAR

CHECK EACH ITEM AS TRANSFERRED TO YOUR CALENDAR

EACH MONTH

- Meet with Primary Contact Staff.
- Meet with school board members.
- Identify non-members and ask them to become members.

JULY

_____1. Try to find some time for yourself before the traditional calendar cycle begins.

_____2. Complete bargaining new contract if negotiations extend into summer.

_____3. Attend NEA Representative Assembly.

_____4. Attend Presidents Conference and Summer Institute.

_____5. Order membership materials.

_____6. Plan Executive Board and/or Rep Council planning retreat or meeting.

AUGUST

_____1. Develop an Association calendar and plan for the year.

- Exec Board planning for year/goal setting/delegate tasks
- Who is attending school board meetings for the year?
- Newsletter schedule
- Site visit schedule
- Schedule Rep Training

_____2. Begin membership campaign including AB 119 data request.

_____3. Officers and Committee Chairpersons develop plans and budget requests for the coming year.

_____4. Send greetings to the new faculty as they are employed. Offer support and invite them to join.

_____5. Hold welcome and orientation meetings recruiting new unit members.

_____6. Reserve location for Exec Board and Rep Council meetings for the year.

_____7. LCAP goal setting with exec board. What we want our role to be (sitting in on the writing, help with survey, etc.), what our goals are; connect with community groups, let them know that they can be a part of the process.

_____8. Plan for district board election, if any.

- FPPC paperwork
- Schedule phone banks
- CTA/ABC Paperwork- INTENT FORM
- Political Dos and Don'ts for Reps
- Start creating materials for election to drop in October (postcards, flyers for schools, door hangers, buttons, bracelets, stickers)
- What local events will the local want to be at? (start paperwork if needed)



Chapter Yearly, Month-to-Month Program Calendar

SEPTEMBER

_____1. Complete committee appointments including the bargaining team, contract writing team, organizing team, contract action or site action teams, etc.

_____2. Develop site visit plan and contract assessment (bargaining) survey.

_____3. Rep Training

- Do you have a rep at every site?
- Are all of your exec board positions filled?
- Is there a membership committee set?

_____4. Distribute chapter handbook, including year's calendar.

_____5. Select delegates for CTA leadership training conferences.

_____6. Membership, Finance Committees to prepare recommendations on budget and dues (if not developed previous spring).

_____7. Plan Kick-Off conference/event, grievance, and faculty rep workshop(s) to begin year's activities.

_____8. Meet with other chapters to plan coordinated bargaining.

_____9. Publish chapter newsletter to introduce chapter officers and committee chairs. Outline bargaining timeline.

_____10. Register members to vote.

_____11. Consider the program of CTA State Council. Instruct representative(s).

_____12. Ensure completion of the second pre-election FPPC report (due about September 28) if the chapter has a PAC that is currently participating in a Fall election.

OCTOBER

_____1. Distribute contract assessment survey to all unit members (if contract expires or includes reopeners) and implement site visit plan.

_____2. Contract Committee reviews current contract and district policies for needed changes.

_____3. Send selected delegates to appropriate fall conferences, sponsored by RRC, UniServ, and Regions.

_____4. Recognition of legislators (non-election year).

_____5. Work with other chapters to plan coordinated bargaining activities.

_____6. Get acquainted with legislator candidates (election years).

_____7. Begin training bargaining team.

_____8. Publish chapter newsletter – introduce bargaining team.

_____9. Plan American Education Week program to increase public awareness of needs.

_____10. Committees submit meeting schedule and goals.

_____11. Announce committee appointments, goals, emphasis.

_____12. Participate in CTA candidate recommendations program in election years.

_____13. Encourage November voting.

HANDOUT

Chapter Yearly, Month-to-Month Program Calendar

_____14. PERB required chapter Financial Report for the prior fiscal year must be made available by October 30 (Does not have to be sent to PERB but must be available to members if requested).

_____15. Ensure completion of the second pre-election FPPC report (due about October 26) if the chapter has a PAC that is currently participating in a Fall election.

NOVEMBER

_____1. Tally results of assessment survey and share bargaining objectives based on negotiations plan.

_____2. American Education Week – involve parents in identifying education needs.

_____3. Wrap up Fall Membership Drive.

_____4. Publish newsletter to community leaders and interested parents.

_____5. Coordinate contract proposal development with other chapters in your coordinated bargaining cluster.

_____6. Study actions of State Council of Education.

_____7. Elections activities including GOTV, precinct walking, phone banks, poll watching.

DECEMBER

_____1. Complete first draft of contract proposals.

_____2. Identify common priority objectives with other chapters in your coordinated bargaining group.

_____3. Check on committee activities and progress toward objectives.

_____4. Publish chapter newsletter.

_____5. Attend Service Center School Board Dinner.

_____6. Reach out to local legislators to talk about local issues.

_____7. Ensure completion of the semi-annual FPPC report (due January 31) if the chapter has a PAC.

_____8. LCAP Meeting with district.

JANUARY

_____1. Review actions of State Council of Education, instruct State Council Representative(s).

_____2. Review Governor's January Budget Proposal for next fiscal year.

_____3. Review legislative program of CTA and be prepared to assist as called upon.

_____4. Publish community newsletters – highlight bargaining objectives of interest to the public.

_____5. Meet with coordinated bargaining chapters to coordinate proposal presentations.

_____6. Start thinking of potential WHO awards candidates.

_____7. Plan for Read Across America in early March.

_____8. IRS and California Franchise Tax Board Annual Exempt Organization Returns, Forms 990 and 199, are due January 15.

_____9. W-2s and 1099-NECs due to recipients January 31, W-3/W-2 and 1096/1099 due to IRS January 31.

HANDOUT

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FEBRUARY

_____1. Present contract proposal to be public at Board of Trustees session (January, February, or early March – see contract requirements, aka Sunshine).

_____2. Update lists of bargaining unit members and association members with updated AB 119 request.

_____3. School Counselor Week – early February.

_____4. Evaluate committee activity – redirect it as needed.

_____5. Hold spring membership campaign – include new faculty, dropouts, and holdouts (February - March).

_____6. Participate in CTA/NEA legislative activity.

_____7. Start to surface school board candidates for next election, if any.

_____8. Review legislative program with membership.

_____9. Begin negotiations with district (late February – early March).

_____10. Publish association newsletter – highlight the start of bargaining.

_____11. If contract expires, gear to thwart any decertification threat during "decert window" period.

MARCH

_____1. Attend PAC Treasurer Training (or send designee).

_____2. Accelerate negotiations efforts.

_____3. Distribute bargaining updates to members after each bargaining session.

_____4. Participate in CTA legislative program.

_____5. Update and test communication system for bargaining support activities.

_____6. Coordinate bargaining strategy with coordinated bargaining group; target best districts for good settlements.

_____7. Study program of the State Council of Education; instruct representative(s).

_____8. Schedule WHO Awards.

_____9. Read Across America.

_____10. Begin campaign for election of new chapter officers.

_____11. LCAP Meeting with district.

APRIL

_____1. Escalate bargaining/organizing efforts; test site organizing structures.

_____2. Public Schools Week – recruit parent support for bargaining goals.

_____3. Administrative Professional Day – last Wednesday of April.

_____4. Develop budget and dues proposals for next year (include attendance at CTA/NEA conferences, provision for bargaining, organizing, and grievance expenses, community action and political action projects, possible crisis, and NEA RA delegate expenses).

_____5. Review actions of State Council of Education.

_____6. Arrange to send delegates to the NEA Representative Assembly.



Chapter Yearly, Month-to-Month Program Calendar

_____7. Accelerate coordinated bargaining: Identify target districts; set settlement standards (if not yet done).

_____8. Register your successor – or yourself if you are serving another term – for the Presidents Conference.

_____9. Register for CTA Summer Institute.

_____10. Ensure completion of the first pre-election FPPC report (due about April 28) if the chapter has a PAC that is currently participating in a Spring election.

MAY

_____1. Achieve contract settlement or escalate.

_____2. Ratify contract – or culminate bargaining/organizing activities.

_____3. Day of the Teacher (early May), School Nurse Day (mid-May), Classified Employee Week (end of May).

_____4. WHO Awards.

_____5. Elect officers/Reps and send election report to the Primary Contact Staff office (timing varies with chapter constitutions and bylaws).

_____6. President Release Day (Sacramento Lobbying).

_____7. Instruct delegates to State Council.

_____8. Complete committee activities – submit written reports.

_____9. Gather summer contact information from members.

_____10. Ensure completion of the second pre-election FPPC report (due about May 26) if the chapter has a PAC that is currently participating in a Spring election.

JUNE

_____1. Publish the association annual report – special issue, or in regular newsletter.

_____2. Install new officers. Give recognition to outgoing officers, bargaining team, committee chairpersons.

_____3. Give recognition to retiring members, those leaving the district, those achieving permanent status.

_____4. Send a copy of new contract to the CTA Bargaining Specialist and Primary Contact Staff.

_____5. Appoint new committee leaders – begin selection of committee members.

_____6. Hold joint meeting of *old* and *new* committees and officers to evaluate year's work and plan for next year (goals/successes).

_____7. Complete mailing list of members' summer addresses.

_____8. Ensure completion of the semi-annual FPPC report (due July 31/August 1) if the chapter has a PAC.

If the chapter or UniServ is incorporated, a Statement of Information SI-100 must be filed with the California Secretary of State every two years.