

# SAMPLE AGENDA

## Local Union Executive Board Planning Meeting

4 Hours

### Sample Meeting Objectives

*By the end of this meeting we aim to have:*

1. A common understanding of the Vital Signs of a Strong Local Union so that we can develop a plan that strengthens our local union's ability to win for our members, students, and communities.
2. A plan for the next (6-18) months that results in a stronger union, increased membership, and greater participation in the union's campaigns and activities. The plan will take advantage of existing opportunities and will include quantitative goals, concrete activities, a specific timeline, and assignments.
3. Shared understanding of the individual responsibilities that are essential to operationalizing the plan we develop, including board member outreach to our union's members.

### Sample Facilitation Agenda for the Meeting Leader

**Before Meeting:** Meet & Greet with refreshments as meeting participants arrive (30 minutes)

#### **1. Welcome, Introductions, Review Objectives & Agenda** (10 minutes)

- Set context and explain purpose of today's meeting.
- Do a round of introductions.
- Review the meeting objectives and agenda.
- Establish meeting norms/ground rules.

#### **2. In These Times** (15-20 minutes)

*Update on current national landscape and federal threats to public education and workers rights, including legal challenges to fair share agency fees.*

- Ask large group: What policy and legal challenges do you see today that present threats to public education and workers rights?
- Take a sampling of responses.
- Summarize with a brief update and why it's so important that our union has a plan.

#### **3. Building A Strong Local Union: Priority Areas for Our Local Union** (60 minutes)

*A review and discussion of the Vital Signs of a Strong Local Union. We will assess our local union and identify priority areas to strengthen.*

- Review with the large group the Vital Signs of a Strong Local Union
- In small groups, ask people to discuss the Vital Signs relative to our local union. Star the areas where we have a solid program that meets goals. Circle areas where improvement is needed. Ask groups to prioritize the areas for improvement ranking the top 3 priorities. Small groups should be prepared to explain to the larger group why they chose their priorities.
- Report back and debrief.
- Aim to reach consensus on the top 3 priorities for our local union.

#### **4. Break** (15 minutes)

#### **5. Review of Existing Key Union & District Dates** (15 minutes)

*A review of meetings, events, and key time periods already on the calendar in order to identify existing opportunities to maximize for our plan.*

- Pre-Chart dates using different color markers or post-it notes so that types of events are color coded. Include dates for things like: bargaining sessions, union executive board meetings, site rep/steward/department rep meetings, general membership meetings, district board meetings, district holidays and breaks, semester start and end dates, and other significant

union and district dates.

- Review with group.
- As you develop the plan later in the meeting, use this calendar as a reference point. Are there existing meetings or events that you can use as an opportunity for member recruitment and turnout? Are there dates that are best suited for a membership outreach drive? Or, dates to avoid? Given the bargaining calendar, what member outreach or contract campaign activities are best suited for the particular contract campaign phase you are in? Etc.

#### **6. Making Our Plan and Putting It Into Action (105 minutes)**

*Putting strategic goals and ideas into concrete action, responsibilities, and timelines.*

- Take the top priority area and open discussion. Solicit the group's ideas for goals, ideas, and activities. Allow people to generally share their perspective.
- Then, begin to narrow in and reach agreement on specific goals, ideas, and activities. Test for consensus. Note on a flipchart when decisions have been made.
- Make sure for each activity that you decide on a timeline/deadline. And, make sure that each activity has a point person to coordinate the work and volunteers to help out. Write names down.
- Track who will do what by when on a flipchart:  

<i><b>What (Decisions/Activities)</b></i>	<i><b>Who (Point Person &amp; Volunteers)</b></i>	<i><b>When</b></i>
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#### **7. Wrap Up (15 minutes)**

- Summarize decisions and next steps
- Determine process for tracking progress and checking in on the plan. At the very least there should be reports at each Executive Board meeting.
- Evaluate today's planning meeting

#### **8. Adjourn** with an inspiring send off!