



Managing your time

Importance of building a Local Union
Calendar



We have all used calendars to keep track of important events, managing time, and planning schedules out of busy routines. There might be different methods used to keep yourself on track by making you aware of important events and dates, but the motive of all those methods is almost the same . And now in this digital world, even calendars have their space in the digital world. We crave those methods which are highly accessible and easy to use. However, merging personal calendars, work calendars, and local union calendars can prove challenging at times.



The purpose of this module is to offer a way to:

- Merge work-union demands into a single calendar since most dates are set at the beginning of the academic year (for school-based locals) or calendar years (for non-school based locals).
- Create a calendared checklist to track tasks of the Executive Committee members throughout each year.

Let us start with building a Local Union Calendar

The local union calendar can be built the “old fashioned way” which means on paper, (You will need to download and print the materials listed below) OR; some may prefer to create the calendar online using word or PDF versions of the documents. What is most important is that you have the materials AND the idea of **COLOR-CODING** events.

MATERIALS:

- blank calendar pages for the months of the [\(school\) year](#) (good idea to have multiple copies of the blank pages)
- list of national and [commonly](#) observed religious holidays
- copy of school district or employer’s calendar ([OU BOCES](#), [PNW BOCES](#), [SWBOCES](#))
- Copy of [TRO ED 14](#) or [TRO ED 15-16](#)
- copy of last year’s union calendar (if you had one) or list of proposed meetings, events, etc.
- copy of union constitution & bylaws
- copy of union guidelines/timelines for meetings, nominations, elections, etc.
- pencils, colored pens, markers or highlighters, erasers & “white out” (or your computer/tablet)



PROCEDURE:

**** Suggestion: Do everything in PENCIL first!****

- Use the school district or employer's calendar to block out all breaks, holidays, conference days, etc. for the entire year.
- Mark the dates of national holidays and the religious holidays most observed in your community.
- Put in the dates of any community events your union participates in (village fair, Making Strides Against Breast Cancer, Labor Day Parade, Relay for Life, etc.)

April 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
	Spring Forward for CHHS					
14	15	16	17	18	19	20
Palm Sunday	No School - Spring Recess				Good Friday	Passover
					Passover begins at sundown	
21	22	23	24	25	26	27
Easter	No School - Spring Recess		PASSOVER			
28	29	30				



PROCEDURE:

Use the union calendar from last year or your list of proposed meetings, events, etc. to start placing union events on the available dates of your calendar.

- a. Start with dates that are least flexible. Some dates/timelines, such as nominations and elections, or annual membership meetings, may be mandated by your constitution & bylaws.
- b. Next place events that are more frequent and recurring – Executive Board, Representative Council, committee meetings, etc.
- c. Now add in other events from last year you wish to continue (workshops or trainings, social events, food drive, etc.).
- d. Last put in new events, including tentative plans. (Putting things on the calendar helps make sure they happen!)

April 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5 1st Friday Social	6
7	8 Spring Forward for CHHS	9 Rep Council	10	11	12	13
14 Palm Sunday	15 No School - Spring Recess	16	17	18	19 Good Friday Passover begins at sundown	20 Passover →
21 Easter	22 No School - Spring Recess	23	24	25	26	27
28	29	30 Exec. Board				



PROCEDURE:

Now transfer the events from the calendar pages to the [electronic template](#) for the one-page listing sheet. This will allow you to provide your members with one place to see all union events for the year.

2018-2019

Dates subject to change.

August

- 1 Event 1
- 2 Event 2
- 3 Event 3

September

- 4 First Day of School
- 7 1st Friday Social
- 18 Representative Council Meeting
- 21 ACU Annual Picnic
- 25 Executive Board Meeting

October

- 2 General Membership Meeting
- 5 1st Friday Social
- 16 Representative Council Meeting
- 21 Harry Chapin Memorial Walk/Run
- 30 Executive Board Meeting

November

- 2 1st Friday Social
- 13 Representative Council Meeting
- 20 General Membership Meeting
- 27 Executive Board Meeting

December

- 4 Representative Council Meeting
- 7 1st Friday Social
- 18 Executive Board Meeting

January

- 4 1st Friday Social
- 15 Representative Council Meeting
- 20 General Membership Meeting
- 29 Executive Board Meeting

February

- 1 1st Friday Social
- 5 Representative Council Meeting
- 26 Executive Board Meeting

March

- 1 1st Friday Social
- 5 Health Governance Board Meeting
- 12 Representative Council Meeting
- 19 General Membership Meeting
- 26 Executive Board Meeting

April

- 5 1st Friday Social
- 8 Spring Forward for CHEFS
- 9 Representative Council Meeting
- 30 Executive Board Meeting

May

- 3 1st Friday Social
- 6 Notice of Elections to be Mailed
- 14 Representative Council Meeting
- 21 ACU Elections
- 28 Executive Board Meeting

June

- 4 General Membership Meeting
- 7 1st Friday Social
- 11 Representative Council Meeting
- 14-15 Relay for Life
- 18 Executive Board Meeting
- 20 ACU Retirement Party
- 26 Last Day of School

Officers and Chairs Calendar

As discussed in the Constitution and Bylaws module, each member of the Executive team as well as members who chair local union committees have specific responsibilities.

For example, besides processing and paying dues, the treasurer must also submit tax forms and ensure there is an annual audit. Your secretary may be the one to be sure that all paperwork is submitted for the annual NYSUT RA. As president, you must ensure that all of the deadlines are met plus whatever other responsibilities you have.

A way to keep track of these tasks and dates is to create a “[task and status](#)” list.

- Organized by title such as president, VP, etc., you can keep track of deadlines of tasks for each officer or committee chair. You can anticipate and help to ensure deadlines are met.
- If needed, others can step in and transition into a position knowing what is expected.
- This is an INTERNAL calendar that can be used at Executive council meetings.

Update and check for accuracy all personal email group distribution lists	Sept
Establish Committees and chairs (consider moving to annual May meeting in future so summer training can occur)	Sept
Know your Contract Activity	Sept
Review Constitution and By-laws	Sept
Seniority lists; check for accuracy; in contract by October	October
Negotiations year	October start process with NYSUT rep
Nominating Committee/Voting	April alert, vote May (annual meeting), transition June, official July 1
Elections, stipends voted on and approved yearly Negotiators, Executive Team	May Annual Meeting currently here in Constitution: budget and stipends should also be decided here: standing committee chairs as well
Meet and review with new executive board accomplishments and recommendations	June
New team meet and discuss roles: i.e. will all team member be part of decisions or President	June
Maintain ALL communication via email and/or cell with local NYSUT Representative	ongoing
Maintain email communication with NYSUT and forward important info	ongoing

Example of the president's tasks and due dates (from the link)

Treasurer		
Status	Task	When
	<p>New members- changes throughout the year based on resignations, new hires, etc.</p> <p>Change membership roster on NYSUT website to reflect retirees, new members, etc. NYSUT Member Link (will need new Treasurer to set up NYSUT account for access)</p>	<p>Ongoing</p> <p>Have new members either fill out an application online or paper copy. If any member does not want to be in the Association they need to fill out a separate form. All copies of forms need to be submitted to Business Office</p> <p>Notify business office of any due's that need to be withdraw for new employees (need to keep track throughout the year with new employees coming/going)</p>
	<p>Change name on Banking account to reflect new Treasurer Change of Signers</p>	September
	<p>Annual Budget presented and voted on by Rep Council at first meeting Annual Budget</p>	September
	Submit Membership Categories to Business	After voted on by Local
	<p>Office with dues withdrawn noted Membership Categories</p> <p>Needs to be completed as soon as possible <i>*Business Office needs to have a copy of all new member enrollment papers</i></p>	<p>*note do not have dues withdrawn from any member that has not signed up for the Association</p>
	<p>Tax Exempt Postcard - submit online for non-profit tax exemption www.irs.gov/990n</p>	By end of January
	<p>Have Audit from previous fiscal year completed by Association members Audit Requirements</p>	By end of February
	Deposit bi-monthly checks into Association Bank account	Twice a month

Example of the treasurer's tasks and due dates (from the link)

Now that you have your
materials, give this a try!

OR

If you have another way to
calendar, please share it
with us! We always love to
hear new ideas!



1. Understand Your Mission

2. Analyze Risks

3. Identify Power Players

4. Review Your Organization

5. Audit Internal Systems

6. Challenge Your Findings

How will you use calendars to manage your time and delegate work?

How will you use calendars to review your organization and ensure fiduciary responsibility?