

New Presidents: First Month Checklist

Source: OPSEU's *New Presidents Getting Started Toolkit*

This checklist is designed to help you pull together the information and documents you need to be an effective new local president.

Check "Yes" to the items you have gathered.

Put question marks beside or highlight the items you don't understand or would like to discuss further.

Set up a place to work	Yes	?
Secure computer and printer to use for union business?		
Secure email address for union business?		
Filing cabinet?		
Local filing system? (e.g. accordion file)		
Local union office? <ul style="list-style-type: none"> If yes, is there a phone, desk, chairs, office supplies 		

Gather information about your local	Yes	?
Local number and the workplaces that are represented by your local?		
Types of jobs your local members do?		
Names and contact information of your local executive committee (LEC) and stewards?		
Copies of the minutes of the last general membership meeting (GMM)?		
Names and contact information for your local's committees (both local and joint with the employer)?		
Minutes of past committee meetings?		
Copies of your local's Trustee Audit Reports (TARs)?		
Whether your local has completed its Trustee Audit Reports? (Required two times per year)		
Copies of the collective agreement(s) that cover your members in your local?		
Copy of your local by-laws (if your local has by-laws)?		
Copy of your local's budget or financial reports to the membership?		
Current information about the active grievances in your local?		

Gather OPSEU information	Yes	?
Name and contact information for your OPSEU staff representative and regional office support staff person?		
Where your OPSEU regional office and/or membership centre is located?		
Name and contact information for your three regional executive board members (EBMs)?		
OPSEU's main phone number? (1-800-268-7376)		
OPSEU website (www.opseu.org)		
Copy of the OPSEU Constitution? If not, do you know where/how to get one?		
Name and contact information of your regional representatives on the: <ul style="list-style-type: none"> • Aboriginal Circle? • Provincial Francophone Committee? • Provincial Human Rights Committee? • Provincial Women's Committee? • Provincial Young Workers Committee? 		
Names and contact information for the: <ul style="list-style-type: none"> • Disability Rights Caucus? • Rainbow Alliance arc-en-ciel? • Workers of Colour Caucus? 		
Whether the local is affiliated with an OPSEU area council?		

Identify local connections to the labour movement and community	Yes	?
Is your local affiliated with the local labour council?		
If affiliated, the names and contact information of the person(s) who represent your local there?		
Contact list for community organizations that your local has connections with?		

Take these actions in your first month	Yes	?
Fill out the Local Executive Committee Contact Information form and send a copy to all LEC, stewards, and the regional office support person		
Notify relevant employers of the local's election results		
In consultation with your LEC: <ul style="list-style-type: none"> • Set a date and time for your first LEC meeting • Set an agenda for your first meeting 		
Set up a meeting with your OPSEU staff rep		