



# 2024 SMART-TD Local Support Training Catalog

The SMART-TD Local Support Department offers a variety of training opportunities for Local officers throughout the year, both online and in-person. Please note, this catalog is subject to change. Check the Local Toolbox for updates.



## Local S&T/President In-Person Workshop

**Description:** This workshop is the most comprehensive and thorough training option for Local **Treasurers and Presidents**. The workshop is 4 days long for Local Treasurers. The portion for Local Presidents is only the first day and a half. The two groups will be combined on the first day and a half. Each Local Treasurer will have a Local evaluation one-on-one session with one of the trainers on the last day of the workshop. Local Presidents should plan departure flights for after 3 pm, day 2. Local Treasurers should plan departure flights for after 7 pm, day 4. Unless held at the National Training Seminar, there is no cost to register for this workshop.

**Capacity:** 25 Treasurers, 25 Presidents

**Day 1 (Combined AM & PM):** Role of Local Officers in Business Operations, Local Meeting Basics, WinStabs (Treasurers only), Elections (Presidents only)

**Day 2(Combined AM, Treasurers only PM):** Disbursements, Excel (Treasurers only), Fund Accounting & Budgeting (Treasurers only)

**Day 3 (Treasurers only AM & PM):** Member Records, TD Connect, eBill, and Variances

**Day 4 (Treasurers only AM & PM):** Payroll Taxes, Reporting & Record Keeping, One-on-One Local Evaluation

Dates:	March 19-22, 2024
Location:	Independence, OH
Class Registration Link:	<a href="https://forms.office.com/r/fjrtFvFD7z">https://forms.office.com/r/fjrtFvFD7z</a>
Registration Deadline:	March 12, 2024
Additional Details/Lodging Information:	<a href="https://bit.ly/wkshpMAR24">https://bit.ly/wkshpMAR24</a>

Dates:	April 9-12, 2024
Location:	Rosemead, CA
Class Registration Link:	<a href="https://forms.office.com/r/6h3kWcZ7kU">https://forms.office.com/r/6h3kWcZ7kU</a>
Registration Deadline:	April 1, 2024
Additional Details/Lodging Information:	<a href="https://bit.ly/APR24wkshpCA">https://bit.ly/APR24wkshpCA</a>

Dates:	June 11-14, 2024
Location:	Glastonbury, CT
Class Registration Link:	<a href="https://forms.office.com/r/2DAp51Edd7">https://forms.office.com/r/2DAp51Edd7</a>
Registration Deadline:	June 3, 2024
Additional Details/Lodging Information:	<a href="https://bit.ly/Junewkshp">https://bit.ly/Junewkshp</a>

Dates:	July 9-12, 2024
Location:	Cleveland, OH (at the National Training Seminar)
Class Registration Link:	<a href="https://register.smart-union.org/">https://register.smart-union.org/</a>
Registration Deadline:	July 8, 2024
Additional Details/Lodging Information:	<a href="https://www.smart-union.org/members/td-regional-training-seminar-schedule/">https://www.smart-union.org/members/td-regional-training-seminar-schedule/</a> COST: \$200-\$290

Dates:	October 16-19, 2024 – S&Ts only. There will not be a Local President track.
Location:	Houston, TX
Class Registration Link:	<a href="https://forms.office.com/r/pE6i8KiEk4">https://forms.office.com/r/pE6i8KiEk4</a>
Registration Deadline:	September 30, 2024
Additional Details/Lodging Information:	<a href="https://bit.ly/Oct24wkshp">https://bit.ly/Oct24wkshp</a>

Dates:	November TBA
Location:	Independence, OH
Class Registration Link:	Coming Soon
Registration Deadline:	November 4, 2024
Additional Details/Lodging Information:	Coming Soon

## Local S&T In-Person Training at Regional Training Seminar

Description: This workshop is an abbreviated option for Local **Treasurers**. The treasurer content is presented on days 2 and 3. Hands-on activities are limited. One-on-one assistance can be scheduled for day 1. Covered topics may include: Role of Local Officers in Business Operations, Local Meeting Basics, Disbursements, Payroll Taxes, WinStabs Overview

Dates:	March 4-7, 2024
Location:	Albuquerque, NM
Class Registration Link:	<a href="https://register.smart-union.org/">https://register.smart-union.org/</a>
Registration Deadline:	March 4, 2024
Additional Details/Lodging Information:	<a href="https://www.smart-union.org/members/td-regional-training-seminar-schedule/">https://www.smart-union.org/members/td-regional-training-seminar-schedule/</a> COST: \$50

## Local S&T/President Online Workshop

Description: This workshop is the most comprehensive and thorough online training option for Local **Treasurers** and **Presidents**. The online version of this workshop is more lecture-based with fewer hands-on activities. The workshop is 3 and a half days long for Local Treasurers. The portion for Local Presidents is only the first day and a half. The two groups will be combined on the first day and a half. A minimum of 10 Treasurers must be registered, or the workshop will be canceled.

Day 1 (Combined AM & PM): Role of Local Officers in Business Operations, Local Meeting Basics, WinStabs (Treasurers only), Elections (Presidents only)

Day 2(Combined AM, Treasurers only PM): Disbursements, Excel (Treasurers only), Fund Accounting & Budgeting (Treasurers only)

Day 3 (Treasurers only AM & PM): Member Records, TD Connect, eBill, and Variances

Day 4 (Treasurers only AM): Payroll Taxes, Reporting & Record Keeping

Dates:	<b>None Scheduled at this Time</b>
Location:	
Class Registration Link:	
Registration Deadline:	
Additional Information:	

## First Steps When Taking Office as Local Treasurer – Online Webinar

Description: **This class is for the newly seated Local Treasurer.** The Local S&T serves as the backbone of the business operations of the Local Union. Join us for a one-hour overview of the important first steps and things to know when first taking office.

It is recommended that new S&Ts take this webinar prior to attending the in-person workshop. All registrants will be emailed a recording of the presentation after the webinar ends. A minimum of 4 Treasurers must be registered, or the workshop will be canceled.

Date:	February 20, 2024; 10:00 am – 11:00 am EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/27b2f5d2-b688-433d-b13e-4df81ba3c0c3@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/27b2f5d2-b688-433d-b13e-4df81ba3c0c3@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	March 14, 2024; 11:00 am – 12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/6a4ddd19-48c2-4ec3-9627-ecef6ba72ce6@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/6a4ddd19-48c2-4ec3-9627-ecef6ba72ce6@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	April 2, 2024; 11:00 am – 12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/eaeb4ca0-d37c-48f9-90b6-0267434fd5ab@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/eaeb4ca0-d37c-48f9-90b6-0267434fd5ab@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	May 30, 2024; 11:00am – 12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/1e521d4f-4f77-4117-8579-886dfa9fe17@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/1e521d4f-4f77-4117-8579-886dfa9fe17@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	June 27, 2024; 11:00 am – 12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/1d3b91ea-2186-42ea-b653-973990474dd0@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/1d3b91ea-2186-42ea-b653-973990474dd0@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	September 24, 2024; 11:00 am – 12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/79a5e2c9-194d-4572-bf00-416ee5fe1a62@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/79a5e2c9-194d-4572-bf00-416ee5fe1a62@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	November 5, 2024; 11:00 am – 12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/fba08f4a-8830-4415-b9ec-84a875adf4a8@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/fba08f4a-8830-4415-b9ec-84a875adf4a8@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

## All About Generating the Treasurer's Annual Report (TAR) – Online Webinar

Description: The Treasurer's Annual Report (TAR) is a report that Local Treasurers generate using the SMART-TD local bookkeeping system called WinStabs. The TAR is required by the SMART Constitution and helps locals meet reporting requirements set forth by the Department of Labor (DOL) and Internal Revenue Service (IRS).

This webinar will explain all the portions of the TAR and the steps to generating the TAR and prepping for the Trustee audit. All registrants will be emailed a recording of the presentation after the webinar ends. **This class is for Local Treasurers.** A minimum of 4 Treasurers must be registered, or the workshop will be canceled.

Date:	February 20, 2024; 12:00 pm- 1:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/13bda66b-320c-499c-a87c-c4f06be59c2a@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/13bda66b-320c-499c-a87c-c4f06be59c2a@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	March 14, 2024
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/be4aecfb-3ff7-4645-b8ee-758127aed515@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/be4aecfb-3ff7-4645-b8ee-758127aed515@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	December 3, 2024
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/f2427995-a7b3-4ecf-a182-731071fea100@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/f2427995-a7b3-4ecf-a182-731071fea100@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

## Auditing the Treasurer's Annual Report (TAR) – Online Webinar

Description: The Treasurer's Annual Report (TAR) is a report that Local Treasurers generate using the SMART-TD local bookkeeping system called WinStabs. The TAR is required by the SMART Constitution and helps locals meet reporting requirements set forth by the Department of Labor (DOL) and Internal Revenue Service (IRS).

This webinar will explain all the portions of the TAR, the steps Trustees should take to audit the TAR and how to present the report to the Local. All registrants will be emailed a recording of the presentation after the webinar ends. **This class is for Local Trustees and Local Presidents.** A minimum of 4 Trustees must be registered, or the workshop will be canceled.

Date:	February 23, 2024; 11:00am-12:00 pm EST
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/b02a6e45-bf29-4b89-b8a5-781d7c66153f@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/b02a6e45-bf29-4b89-b8a5-781d7c66153f@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>

Date:	March 12, 2024
Location:	Online – Microsoft Teams Webinar
Class Registration Link:	<a href="https://events.teams.microsoft.com/event/63342a8e-f754-42ad-971c-2b9ba3ecae61@a462fbc2-3c7e-47d6-8139-62bd8b9cac56">https://events.teams.microsoft.com/event/63342a8e-f754-42ad-971c-2b9ba3ecae61@a462fbc2-3c7e-47d6-8139-62bd8b9cac56</a>