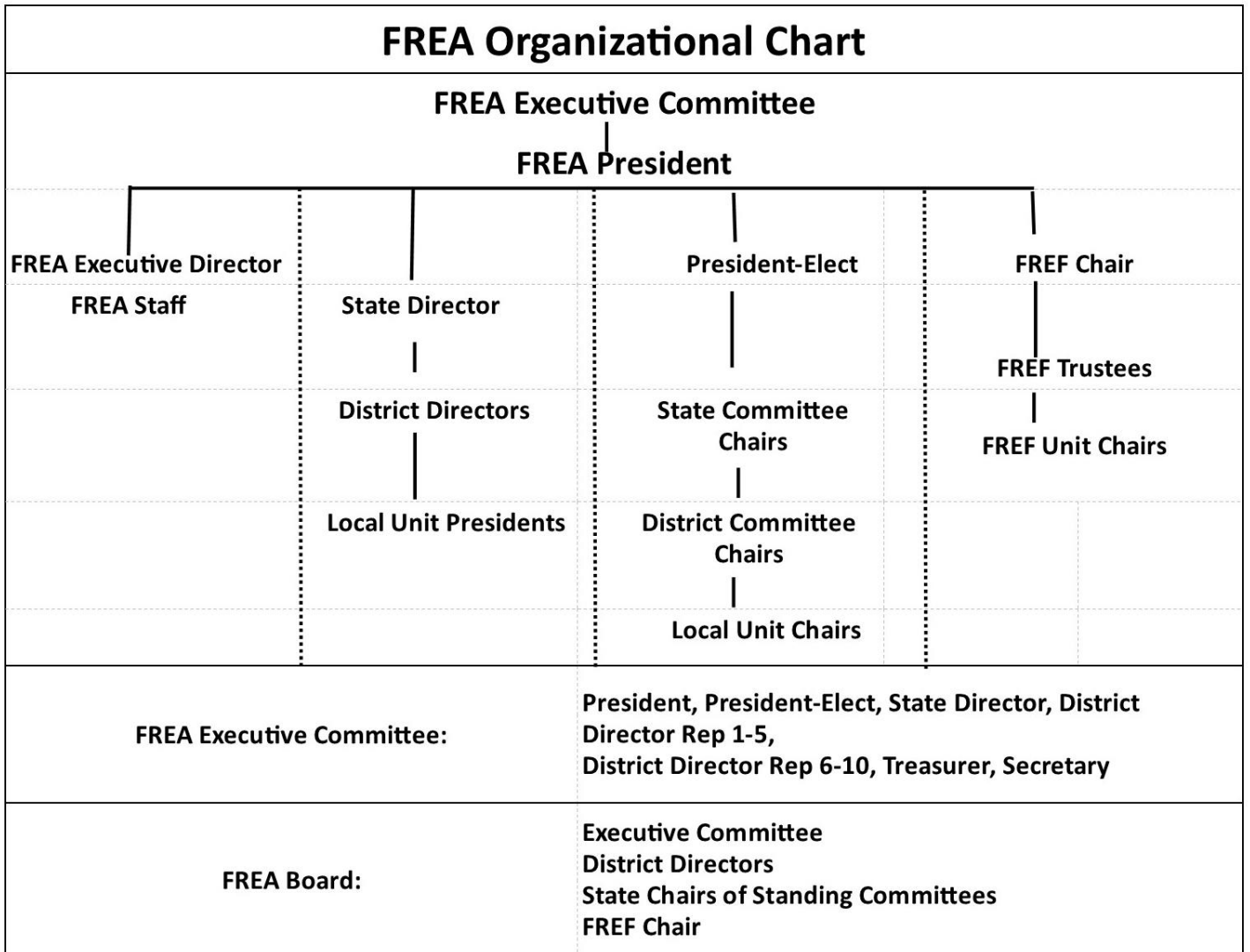




# FREA Unit Officer Handbook

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<b>FREA/FREF Unit Reports-Actions Calendar</b>			
<b>Date</b>	<b>Report</b>	<b>Responsible</b>	<b>Destination</b>
	<b>VIF—Very Important Form: Report of Contact Info for Unit Officers and Meetings</b> —Please send to Office after election of officers and when any changes of meeting times, locations, etc.	Unit President	FREA Office
January 1	<b>Deadline: Any Unit Dues increase</b> is due to the Office to be included in Member renewal invoice for upcoming year.	Unit President	FREA Office
February 15	Scholarship Submittal Deadline from Units	Unit FREF Chair	FREF District Trustee for District 1-5/6-10
February 15	Practicing Educator Grant	Practicing Educators	FREA Office
Jan/Feb FREA Board Meeting	Unit Contact Progress report	State Committee Chair	President-Elect
	Potential Leadership Candidates	District Directors Unit Presidents	Nominating Chair State Director
March 1	Membership Grant Proposals	Unit Membership Chair	FREA Office
	Return Convention Delegate Names to Office	Unit President	FREA Office
March 15	<ul style="list-style-type: none"> <li>Unit volunteer services reports</li> <li>Volunteer of Year Nominee</li> <li>5<sup>th</sup> Grade Essay Deadline for units</li> </ul>	Unit VS Chair	District VS Chair
March 31	Certificate of Recognition Deadline <ul style="list-style-type: none"> <li>Per member contribution (\$2-3-4-5)</li> <li>Honorarium and Memorial donation</li> </ul>	Unit President	FREA Office
April 1	<ul style="list-style-type: none"> <li>Copy of each units' volunteer report</li> <li>1 5th Grade Essay selection</li> <li>1 VOY selection</li> </ul>	District VS Chair	State VS Chair
	<ul style="list-style-type: none"> <li>Liability Insurance Payment Due to FREA Office</li> </ul>	Unit President/ Treasurer	FREA Office
May 1	Deceased names to FREA Office for Convention Memorial Program	Unit Officer responsible	FREA Office
August 31- Sept 30	Scholarship Information to High Schools	FREF Trustees Unit FREF Chairs	All High Schools in District
September - October	<ul style="list-style-type: none"> <li>5<sup>th</sup> Grade Essay Information to schools*</li> <li>Practicing Educator Grant info to schools*</li> </ul>	District/Unit Volunteer Services Chair	<ul style="list-style-type: none"> <li>All grade schools possible</li> <li>All schools possible</li> </ul>
October 15	<ul style="list-style-type: none"> <li>Notify FREA Office of person receiving Extravaganza tickets</li> </ul>	FREF Chair	<ul style="list-style-type: none"> <li>FREA Office</li> </ul>
2nd week in November	<ul style="list-style-type: none"> <li>Office mails Extravaganza Tickets</li> </ul>	FREA Office	<ul style="list-style-type: none"> <li>FREA Office</li> </ul>
	VS = Volunteer Services		

## As Unit Bylaws Chair

What are your responsibilities?

Our Bylaws outline the unit's overall structure and key policies, defining how the unit operates when everything runs well or when issues arise.

To your Unit?

- Attend Executive Committee (EC) and Unit meetings.
- Review and check for consistent unified language between the FREA State Bylaws and the Unit's Bylaws. Our Unit Bylaws must comply with FREA Bylaws.
- If there are revisions to the Unit Bylaws any revisions must be voted on by the membership. The membership must be notified 30 days in advance of the vote.
- Transmit an electronic copy of the current Unit Bylaws with updated approved revisions to the Executive Director in the FREA Office.
- The Unit's Bylaws committee must review all bylaws every 2 years.
- Ensure the Unit follows the procedures as stated in accordance with the Bylaws.
- Must have experience of Parliamentary Procedure, and
- Knowledge of Roberts Rules of Order (latest version) for effective meeting management.
- Knowledge of the correct way to conduct a meeting (Executive Committee and General Meeting).
- Mentor Presidents and officers in motions, and amendments, to ensure correct procedure is followed.
- Chair is encouraged to join Parliamentary group for personal growth (National Association of Parliamentarians, NAP).

To FREA?

- Transmit an electronic copy of the current Unit Bylaws with updated approved revisions to the Executive Director in the FREA Office.
- The FREA office has electronic copies of the Unit Bylaws. The FREA Bylaws are available online at the FREA website.

To understand the revisions in Bylaws:

If a word, phrase, sentence, or paragraph has been struck through ~~like this~~ that means it will be omitted.

If a word, phrase, sentence, or paragraph has been underlined like this that means it will be added.

## **As Unit Corresponding Secretary/Sunshine Chair**

What are your responsibilities...

To your unit?

- Attend Executive Committee (EC) and unit meetings. Work with Unit President and EC to develop and support unit and state activities.
- Use cards, emails, phone calls to contact members who have experienced major life events.
- Recognize member birthdays, i.e. cards, recognitions at meetings, and newsletters.
- Write thank-you notes for meeting presenters or others for service to the unit.
- Other duties defined by Unit Bylaws or as necessary

## **As Unit FREF Scholarship Chair**

What are your responsibilities?

To your unit?

- Attend Executive Committee (EC) and Unit meetings. Prepare report for each meeting.
- Work with Unit President and EC to develop and support unit and state activities.
- Introduce your members to FREF.
- Keep local unit informed of the activities and programs of FREF.
  - Fundraising
  - State scholarships
  - Practicing Educator Grant
  - Assistance for Retirees in Financial Crisis
- Create local fundraising activities to raise money for FREF.
- Coordinate fund-raising for Unit Scholarships.
- Communicate FREA and unit scholarship information to local high schools.
- Encourage students to complete scholarship applications on a timely basis.
- Form a committee to interview and select a nominee from your unit for the FREF scholarship program.
- Arrange to present FREF scholarship during high schools' awards program.
- Current Unit chairs will serve as a mentor to new chairs before they take office and after they are in office.
- Form a committee to select a nominee for your unit scholarship.
- Arrange Unit Scholarship award events.
- Other duties defined by Unit Bylaws or as necessary

### **To FREA/FREF?**

- Coordinate unit fundraising efforts on behalf of FREF.
  - Extravaganza tickets
  - Unit contribution to FREA/FREF Convention fundraiser
  - Other unit contributions for Certificate of Recognition
- Keep in touch with FREF District Trustee.

## **As Unit Information Services Chair**

What are your responsibilities...

To Your Unit?

- Attend Executive Committee (EC) meetings. Work with the unit President and EC to develop and support unit and state activities.
- Arrange for Information Services programs/handouts at teach unit meeting.
- Monitor the FREA website, and State Information Services Chair emails to share information with members.
- Access AMBA and FRG Benefits information as to what they offer our members.
- Other duties as defined by the Unit Bylaws or as necessary.
- Assist members in accessing the FREA website and available resources.

To FREA?

Keep in touch with District and State Legislative chairs.

## As Unit Legislative Chair

What are your responsibilities ...

To your unit?

- Attend Executive Committee (EC) and unit meetings. Work with the Unit President and the EC to develop and support unit and State activities.
- To maintain our tax - exempt status, ensure unit activity is nonpartisan. We can address key issues in compliance with our FREA Legislative priorities (i.e., retirement issues).
- Share information from District Legislative Chairs with unit members in a timely manner.
- Encourage and assist unit members to become active on issues pertaining to FREA priorities.
- Maintain continuous contact with local senators and representatives.
- Invite elected officials to meet with local members at unit meetings throughout the year.
- Prepare talking points to address key issues.
- Relay “action alerts” during legislative sessions to members on pending legislation to encourage member support for FREA efforts.
- Provide current contact information to all members of the local senators and representatives.

To FREA?

Keep in touch with District and State Legislative chairs.

## As Unit Membership Chair

### What are your responsibilities ...

#### To your unit?

- Keep in touch with the State Chair, build membership for the unit and state.
- Maintain a Master list of all unit members with emails (send out once a year / or as directed to all members with email)
- Attend the Unit Board of Directors monthly meetings - give a report. Work with the Unit President and the Board to develop and support unit and state activities.
- Set up a caller list of paid members without emails
- New Member registration
  - Collect completed Unit registration forms and submit FREA forms,
  - Transmit dues paid to Treasurer, and
  - Work with unit Treasurer to update membership lists with names of paid members
- Turn checks and or cash into the Treasurer in a timely manner
- Notify unit President and FREA of members' info changes and unit membership deaths
- Contact unit members via email, snail mail or phone of dues renewal, etc.
- Update Membership data and email as needed
- Run labels and name tags as needed
- Obtain District retiree list from the county office or the FREA State Office. Normally the list is available in August by request through the State office.

#### To FREA

- Complete FREA forms for membership and retain a copy
- Notify President and FREA of members' info changes and unit deaths
- Complete all FREA reports on time
- Submit membership grant requests to FREA Treasurer.

#### **Note: FREA welcomes all retirees:**

Teachers

Administrators

Administrative and Classroom Assistants

Secretaries, Bookkeepers/ Accountants

Bus Drivers

Custodial Personnel

Cafeteria Workers

Paraprofessionals and Teacher Assistants

Retirees from other states who now live in Florida

Charter School Retirees

Associate members (any persons with interest in the FREA Mission and education)



## As Unit President

What are your responsibilities...

To your unit?

- Reserve and confirm meeting rooms for Executive Committee (EC) and general meetings. Publish a list of the scheduled meetings for membership.
- Plan engaging meetings with assistance of EC.
- Publish meeting agendas. (Maintain copies for 2 years.)
- Preside at EC and general membership meetings.
- Organize unit committees as defined by Unit Bylaws.
- Appoint committee vacancies as needed.
- Other duties defined by Unit Bylaws or as necessary
- Review the Unit of Excellence Suggested Strategies with the EC and general meeting twice a year.
- Coordinate with the District Director for the Fall Symposiums.
- Gather the end of the year reports in June and maintain a file for 2 years.
- Mediate any conflicts that arise.
- Conduct a yearly training on the use of the FREA website and zoom training for the unit membership.
- Encourage membership and attend the Convention.
- Review and update unit By Laws every 2 years in accordance with the FREA Bylaws.

To FREA?

- Use “Unit meeting and Officer Contact Information” report to notify FREA of unit officers whenever change occurs.
- Send convention delegate information to FREA.
- Keep in touch with District Director.
- Review and update unit Bylaws every 2 years in accordance with the FREA Bylaws.

To FREA?

Keep in touch with District Director

## **As Unit President-Elect/Vice President**

What are your responsibilities...

To your unit?

- Attend Executive Committee (EC) meetings and general meetings.
- Preside in place of Unit President when necessary.
- Assist the Unit President with their duties.
- Prepare to assume the duties of President.
- Other duties defined by Unit Bylaws or as necessary

## **As Unit Recording Secretary**

What are your responsibilities...

To your unit?

- Attend Executive Committee (EC) and unit meetings. Work with Unit President and EC to develop and support unit and state activities.
- Record and maintain minutes at all EC and unit meetings.
- Distribute copies of above minutes.
- Other duties defined by Unit Bylaws or as necessary

## As Unit Treasurer

What are your responsibilities...

To your unit?

- Maintain an accurate record of unit income and expenses.  
Unit may maintain separate accounts of general expenses and scholarships.
- Make deposits and write checks in a timely manner.
- Provide Financial Report to Executive Committee (EC) and at the Unit meetings.  
Work with EC to develop yearly budget.
- Coordinate audit of accounts at end of fiscal year (June 30<sup>th</sup>).
- Work closely with Membership Chair to maintain an up-to-date list of paid members.  
Big membership push in April and August.
- Other duties defined by Unit Bylaws or as necessary.

To FREA?

- Use “Unit Membership Dues Form” to transmit dues and information to FREA office as dues are collected. The form is available from the state office. Labels will be sent to you from the state office.
- Transmit FREF donations in a timely manner.
- Transmit Liability Insurance payment to FREA in the spring.

## As Volunteer Servicers Chair

What are your responsibilities ...

To your unit?

- Encourage members to become volunteers in their communities. Remember to emphasize opportunities that encourage literacy.
- Keep members informed of opportunities in your local area.
- Ask members to keep track of their volunteer hours and submit them to you either monthly or annually by the end of February. With Our Youth hours may qualify for recognition by AARP, so please report them separately if possible.
- Attend all meetings of your local unit and work with the unit president and executive committee to develop and support local volunteer projects.
- Complete the Unit Volunteer Services Report and Unit Volunteer of the Year Nomination form and submit to your District Chair by March 15<sup>th</sup>. Use the current forms located on the FREA website.
- Encourage 5th Grade students, Teachers and Administrators to participate in the 5th Grade Essay Contest.
- Email your contact information to the State Chair as soon as the officer begins the position. Contact information should include the following: Name Position Local Unit District Address City/State/Zip Home Phone Cell Phone.

To FREA?

Keep in touch with District and State Legislative chairs.