

FLORIDA RETIRED EDUCATORS ASSOCIATION HANDBOOK and INFORMATION GUIDE



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Handbook Committee

FLORIDA RETIRED EDUCATORS ASSOCIATION HANDBOOK COMMITTEE

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Greetings



Dear FREA Member,

I am honored to share with you our FREA Handbook. The objective of our committee compiling the information is to insure there is continuity throughout our units of the process we use to conduct our business and complete our responsibilities. The information is compiled and written by the actual people doing the work in each area under the guidance of our President Elect, Harriett Jenkins. We owe them a debt of gratitude, for their dedication to FREA in completing this handbook.

Our history connects us to the National Retired Teachers Association (NRTA) and AARP' educational community as Ethel Percy Andrus founded the associations after finding a teacher living in a chicken coop in California, without retirement benefits. Her motto became our mantra, "To serve, and not be served". We have a long history fighting for support for retired educators over many decades. We were established as the Florida Retired Educators in 1954.

We strive to promote the economic wellbeing of our retired educators, as well as continue the professional concern for education in the State of Florida. It is important for our membership to be involved in community affairs and enjoy fellowship among our retirees as we pursue our volunteer activities. Through our Florida Retired Educators' Foundation, we invest in future educators by providing State Scholarships to high school seniors in the field of education.

FREA's motto is *"The Organization that Honors your yesterdays, enriches your present, and Secures your future."* Our goal is to welcome new members and continue to share our talents and enrich our communities in which we live.

Each FREA member brings true value to our organization. There is a place for each member and each local unit. Through our seminars and symposiums, we provide the leadership training to support each chair and officer serving in a local unit. State business for FREA is conducted at our Conventions. As educators we will always be lifelong learners. We hope this handbook guides you and provides a framework of ideas and directions. No one handbook can answer all questions, but our FREA Board and Executive Director are here to answer additional questions as needed.

Best Wishes for a successful year to each local unit.

Sincerely,

A handwritten signature in cursive script that reads "Edwenna Williams".

Edwenna Williams,
President FREA

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FREA Vision and Mission



FREA Vision and Mission Statements

The Florida Retired Educators Association (FREA) is a caring, active, and knowledgeable community of retired educators, school personnel, and other supporters who give their talents and time to support retired and active school employees; and the communities in which they live.

FREA Mission

- To safeguard the strength of the Florida Retirement System
- To support public education in Florida
- To provide fellowship opportunities
- To encourage community involvement
- To be a source of information and materials

Suggested Strategies

To Safeguard the Strength of the Florida Retirement System:

- Strongly support action plan of FREA Legislative committee
- Contact legislators with regular emails, letters, phone calls, and visits
- Share FREA legislative agenda with community
- Invite legislators to meetings

To Support Public Education in Florida:

- Attend school board meetings
- Serve on school committees
- Adopt a classroom
- Volunteer in schools
- Invite school board members to attend meetings; make them honorary members

To Encourage Community Involvement:

- Support the 5th Grade Essay Contest
- Network with other organizations
- Donate magazines to hospitals and libraries
- Promote scholarships both local and FREF
- Promote the Margaret Poppell Literacy Project

To Be a Source of Information and Materials:

- Refer to website, Facebook and *FREA Bulletin*
- Give informative programs
- Create posters for libraries, post offices, and other public spaces

To Provide Fellowship Opportunities:

- Be welcoming
- Provide nametags
- Have icebreakers
- Have interest groups
- Have FUN!



What is FREA?

HISTORY OF FLORIDA RETIRED EDUCATORS 1954-Today

A brief historical background of FREA

1954: The Retired Educators of Florida were organized on April 9, 1954, as a section of the Florida Education Association (FEA) with Paul D. Phillips serving as President.

The three purposes for organizing were:

1. to promote the economic, social, and professional status of retired educators, and the exchange of information of value to them
2. to safeguard and improve retirement benefits by promoting passage of legislation
3. to promote the involvement of retired educators in promoting Literacy through volunteer services

1971: The Florida Retired Educators section was reorganized in the fall of 1971, as the Florida Retired Teachers Association (FRTA), an affiliate of The Florida Educators Association (FEA).

1974: In September of 1974, a committee was appointed to study the future of the organization.

1975: A recommendation of the committee was accepted to discontinue affiliation with FEA and establish an independent organization with a separate office.

1975: FRTA affiliated with NRTA and was provided space in the NRTA/AARP District office in St. Petersburg.

1982: In July the NRTA officially merged with and became a division of AARP.

1982: Fall - FRTA changed its name to Florida Retired Educators Association (FREA), so benefits could be extended to faculties of higher education and certificated employees of county school boards who were primarily employed as supervisors and administrators.

1984: February - The Florida Retired Educators Foundation established as an adjunct to the FREA for the purpose of providing scholarships for future Educators, assisting retired educators in crisis, and publication of valuable educational material.

1988: The FREA office was housed in the St. Petersburg AARP State office.

1994: FREA moved down the hall to a separate four-room office, which was sub-leased from AARP.

1999: AARP located to a new building and FREA remained at current location.

2001: FREA moved office to larger quarters at the Bay View Tower in downtown St. Petersburg.

2005: FREA relocated the office to 10051 5th St. N Suite 108, St. Petersburg, due to demolition of previous building.

2015: FREA moved office to a different building at the request of landlord. Their current location is: 8950 9th St. N. Suite 105, St. Petersburg, FL 33702-3047

2018: With the higher level of available technology increasing efficiency, FREA downsized from three office personnel to two, an Executive Director and a Membership Accounting Specialist.



FREA State Office

What is FREA (Florida Retired Educator Association)?

- FREA is a not-for-profit 501(c)(4) organization established in 1954.
- FREA is independent, nonpartisan, and does not endorse candidates.
- FREA is a statewide organization with 48 Units.
- FREA considers Florida public education system retirees a top priority and provides valuable resources for members.



The FREA Office
8950 9th St. N. @105
Saint Petersburg, FL 33704
727-577-6400
info@frea.org www.frea.org
We are on Facebook and Twitter



Anne M. Fagan
 FREA Executive
 Director
anne@frea.org

Diane Lynch
 Membership and
 Accounting Specialist
Diane@frea.org

FREA Office hours are 8AM to 4PM Monday through Friday.
FREA has two full time employees who create the continuation
of knowledge and service in the organization.

What is an Association?

- An association is an organization of people with a common purpose.
- Effective organizations are composed of interdependent and coordinated parts that have common goals.
- All of the parts must cooperate and function as a coordinated whole within the framework of approved programs that provide a healthy degree of uniformity.
- To provide a degree of uniformity and direction toward the association goals for all FREA units, the following framework is supported in the FREA Bylaws as follows:

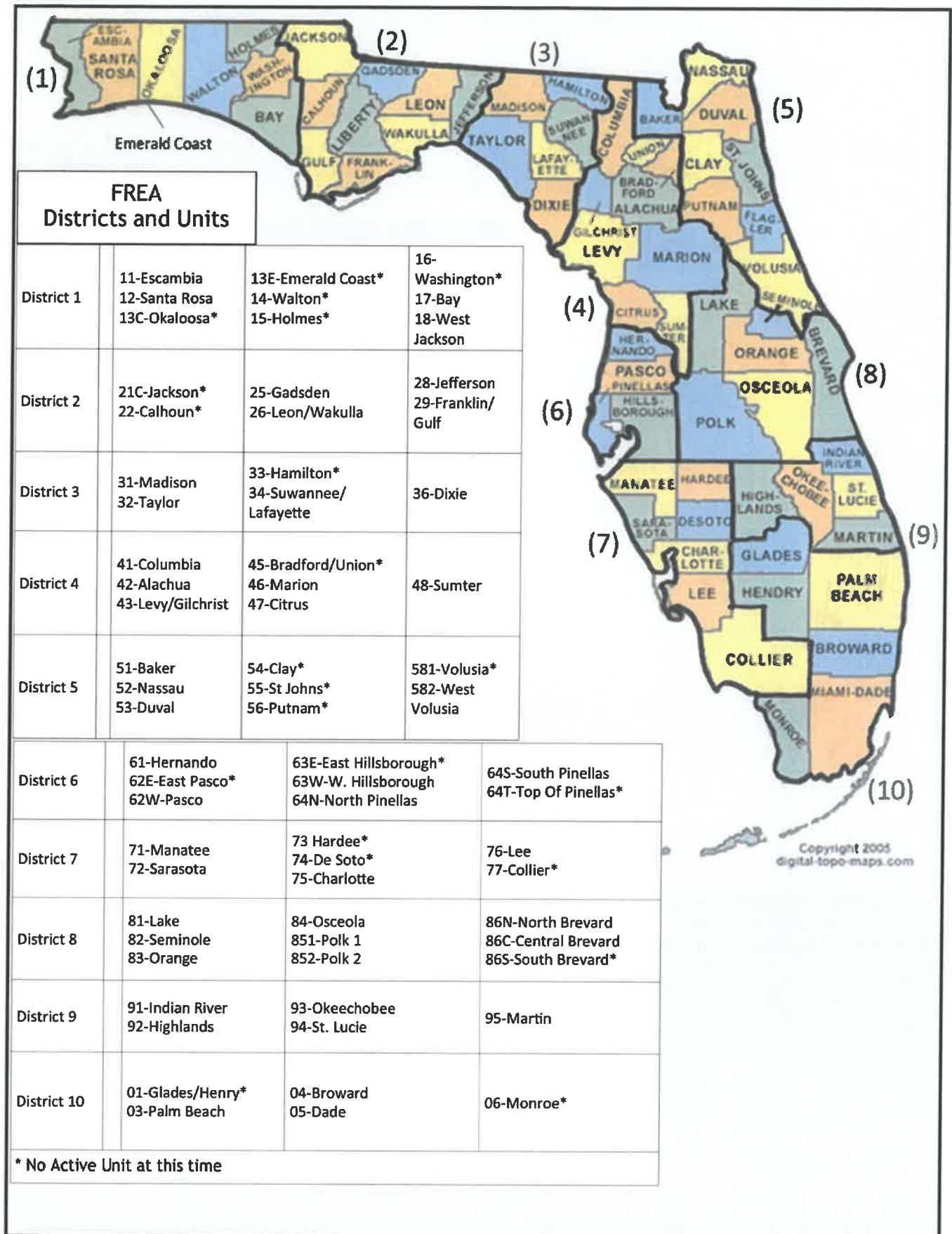
FREA State Office - The FREA state office is the administrative headquarters of the association. It is staffed by an Executive Director and Membership Accounting Specialist. The state office is responsible for the day-to-day operations of FREA, and the implementation of policies and programs as approved by the FREA Executive Committee.

FREA Districts - FREA is divided into 10 Districts determined geographically by counties. These geographic units take into consideration major metropolitan areas, urban areas and rural counties. Each District elects a District Director who is a voting member of the Board of Directors. Each District Director is a main point of contact between the state office and the local FREA units.

Local Units - The FREA recognizes 48 local units. They adhere to the requirements of the state Bylaws. Local unit members are made up of education and school personnel retirees. Our Units are very important to us, and the State Office strives to provide a strong support system for Units.



FREA Districts and Units





FREA Awards

FREA Awards

Unit Awards

Volunteer Services Participation

Presented by: State Volunteer Services Chair

A unit will receive an award if 10-40% (depending on unit size) or more, of its members report actual volunteer hours. The highest 6 units will receive an award.

FREF Foundation – Certificate of Recognition

Presented By: State FREF Chair

A unit will be awarded a certificate if it meets the requirements on the "Certificate of Recognition Form". If the unit does the before mentioned plus increases its donation to \$5.00 per member, it will receive an award.

Membership Award

Presented By: State Membership Chair

A unit will receive an award if it increases its FREA membership. FREA Office verification is required.

Annual New Member Contest

Presented By: State Membership Chair

Each local FREA unit will be awarded one (1) entry for each NEW FREA member added for the period of January 1— December 31. The entries will be placed in a drawing for \$100, held at the Annual FREA Convention. The award may be used by the unit as they so choose. FREA Office verification is required.

Unit of Excellence Award (Suspended)

Presented By: President-Elect

This is a voluntary award. A Unit will receive this award if it completes the criteria contained in the rules. Some of the criteria are to be verified. Verified FREA membership growth is mandatory.

Individual Awards

Volunteer Services Award

Presented by: State Volunteer Services Chair

Unit Volunteer of the Year: Each unit nominates a candidate and provides a way to recognize that member.

District Volunteer of the Year: Each will receive a certificate and an award.



Organizational Chart

FREA Organizational Chart

FREA Executive Committee

7 Members

President

President Elect

Treasurer

District Director Rep 1-5

*President's Invited Guests

State Director

Secretary

District Director Rep 6-10

FREA Board of Directors

15 Members

President

President Elect

State Director

Secretary

Treasurer

Directors 1-10

*President's Invited Guests: State Committee Chairs
FREA Executive Director, FREF Chair, Past Presidents,
Ad Hoc Committee Chairs, Speakers, and Persons of Interest

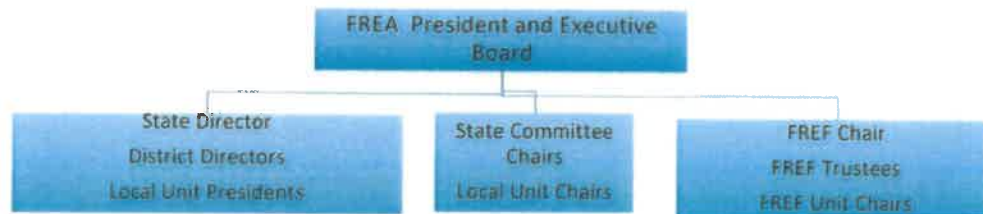
State Committee Chairs

6 Members

By-Laws Information Services Legislative
Membership Nominations Volunteer Services

Ad Hoc Committees

Necrology Recruitment Convention





FREA/FREF
Unit Reports-Actions Calendar

FREA/FREF Unit Reports-Actions Calendar			
Date	Report	Responsible	Destination
VIF—Very Important Form: Report of Contact Info for Unit Officers and Meetings—Please send to Office after election of officers and when any changes of meeting times, locations, etc.		Unit President	FREA Office
January 1	Deadline: Any Unit Dues increase 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"> Unit volunteer services reports Volunteer of Year Nominee 5th Grade Essay Deadline for units 	Unit VS Chair	District VS Chair
March 31	Certificate of Recognition Deadline <ul style="list-style-type: none"> Per member contribution (\$2-3-4-5) Honorarium and Memorial donation 	Unit President	FREA Office
April 1	<ul style="list-style-type: none"> Copy of each units' volunteer report 1 5th Grade Essay selection 1 VOY selection 	District VS Chair	State VS Chair
	Liability Insurance Payment Due to FREA Office	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"> 5th Grade Essay Information to schools* Practicing Educator Grant info to schools* 	District/Unit Volunteer Services Chair	<ul style="list-style-type: none"> All grade schools possible All schools possible
October 15	Notify FREA Office of person receiving Extravaganza tickets	FREF Chair	<ul style="list-style-type: none"> FREA Office
2nd week in November	Office mails Extravaganza Tickets	FREA Office	<ul style="list-style-type: none"> FREA Office
	VS = Volunteer Services		



District Directors

District Directors

The FREA organization provides a valuable resource for all local unit Presidents—District Directors. In each District throughout the state, convention delegates elect an individual from the district to represent them on the FREA Board of Directors. That individual's responsibility is to "serve as the chief liaison between the FREA Board of Directors and the local units".

FREA District Director Goals and Duties

1. To serve as a liaison between the FREA Board of Directors and the local units.
2. To provide information and assistance to Unit Presidents regarding the FREA operations and the role of local units within the organization.

How:

- Contacting local unit presidents within a District to offer assistance to assure the smooth operation of local units
- Serving as the principal source of help to the local Retired Educators Association units by providing information regarding memberships, programs and services/benefits from the Association
- Providing opportunities for leadership training activities through the Fall Symposiums planned for each District
- Attending local unit meetings or unit board meetings
- Requesting a spot on the local unit meeting agenda to speak to the membership regarding Association business
- Encouraging local units to submit newsworthy articles to the FREA office for publication in the *FREA Bulletin*
- Distributing all relevant materials to unit presidents
- Assisting unit presidents in preparing and submitting all reports in a timely fashion; and
- Encouraging and assisting local units with membership recruitment and retention activities.



FREA Standing Committees And Purposes

FREA

Standing Committees



The 6 FREA Standing Committees include:

- Bylaws
- Information Services
- Legislative
- Membership
- Nominating
- Volunteer Services

Each of these committees has a State Chair that is appointed by the FREA President. The FREA President-Elect works with the State Committee Chairs.

FREA Standing and Special Committee Purposes

FREA has multiple committees that carry on the work of the Florida Retired Educators Association, and it is critical to FREA's mission that all committees work together. The standing committees are:

Membership

This committee's purpose is growing FREA Membership. We invite all members of the retired educational and school support community to join the team of FREA members, who are bound together by the goals set forth in the FREA Mission Statement.

Volunteer Services

This committee encourages volunteerism and the reporting of volunteer hours by all unit members. Any unpaid services to individuals, groups, or entire communities qualify for volunteer hours: tutoring, hospital service, personal help to the disabled, conservation activities, and serving on civic committees and boards. As retired educators and school personnel, projects that place an emphasis on literacy are encouraged.

Information Services

This committee provides a comprehensive approach to living in retirement. Using live and/or virtual programs, and online and print information, the committee works to enable members to live a healthy, safe, and fiscally sound retirement.

Legislative

This committee promotes legislation at the state level to meet the needs of all Florida Retirement System retirees. This committee communicates with, and supports, the local unit legislative chairs with materials necessary to promote the current FREA Legislative Priorities.

Nominating

This committee is charged with the task of finding qualified candidates to fulfill the positions of elected officers, in both FREA and FREF, in accordance with the FREA Bylaws procedure below:

Section 9.01

A standing Nominating Committee composed of the immediate Past President, who will serve as Chair, the State Director, the two District Directors on the Executive Committee and one member at large appointed by the incoming President for a two-year term, coinciding with the President's term of office, shall work on a year-round basis to secure candidates to fill vacancies in elective offices. The Nominating Committee shall prepare a slate of nominees to be presented to the Convention. This slate shall be printed in the last issue of the *FREA Bulletin* published before the meeting of the Delegate Convention. Nominations may be made from the Convention floor provided prior consent of the nominees has been obtained. *(From Anne – I thought that this committee should be more formally outlined as it is so structurally defined.)*

Bylaws

This committee is charged with the task of reviewing the Bylaws in accordance with the FREA Bylaws procedure below:

Section 15.01 Proposals.

Any member, affiliated unit, or other committee or group of the Association, having any recommendation for changes in these Bylaws, may submit the recommendation for changes in writing to the President, with a copy to the Chair of the Bylaws Committee.

Section 15.02 Review.

The Bylaws of the Florida Retired Educators Association shall be reviewed for change at least every two (2) years.

Special Committee: Benefits

The FREA Benefits committee is a special committee and meets at the state level only when deemed necessary. This committee's purpose is to study, recommend, and monitor benefits to FREA members. The committee also acts as a liaison between the members and the companies. The Benefits Committee ensures nothing goes to the State Insurance Department for consideration without the committee's approval.



FREA Committee Chairs

FREA Bylaws Chair

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

Responsibilities of STATE Bylaws Chair

- Report directly to President Elect.
- Maintain an accurate contact list of Bylaws Chairs and notify FREA as changes occur.
- Provide support, guidance, and information for Unit Bylaws Chairs to share with units.
- Attend FREA Board of Directors meetings by invitation of FREA President.
- Present reports at August and January Board of Directors Meetings
- Present an Annual Report due April 15th.
- Participate as requested at FREA Convention.
- Maintain active participation with local unit.
- Assist other State Committees as requested
- Perform other duties as stated in FREA Standing Rules.

Responsibilities of UNIT Bylaws Chair

- Review and check for consistent unified language between the FREA State Bylaws and the Unit's Bylaws. Unit Bylaws must comply with FREA Bylaws.
- Notify the membership in writing 30 days in advance of the vote if there are revisions to the Unit Bylaws. Any revisions must be voted upon by the membership.
- Lead the committee during the review of the Unit's Bylaws every two years.
- Transmit an electronic copy of the current Unit Bylaws with updated approved revisions to the Executive Director in the FREA Office when asked, or every time there is a revision.
- Notify Unit members that FREA Bylaws are available online at the FREA website.
- Ensure the Unit follows the procedures as stated in accordance with the Bylaws.
- Have experience of Parliamentary Procedure.
- Have knowledge of Roberts Rules of Order (latest version) for effective meeting management.
- Have knowledge of the correct way to conduct a meeting (Executive Committee and General meetings of the Unit).
- Mentor Presidents and officers in motions and amendments to ensure correct procedures are followed.
- Consider joining National Association of Parliamentarians (NAP) for personal growth.

Excerpt from the current FREA Bylaws:

Section 15.01 Proposals.

Any member, affiliated unit, or other committee or group of the Association, having any recommendation for changes in these Bylaws, may submit the recommendation for changes in writing to the President, with a copy to the Chair of the Bylaws Committee.

Section 15.02 Review.

The Bylaws of the Florida Retired Educators Association shall be reviewed for change at least every two years.

FREA Information Services Committee

The Information Services Committee works to increase FREA membership through communication, providing information important to FREA retirees that will improve their quality of life in retirement.

Responsibilities of STATE Information Services Chair

- Report directly to President-Elect.
- Select District Information Services Chairs (2-year term) and notify FREA by August 1st. (State Chair option)
- Maintain an accurate contact list of District/Unit Information Services Chairs and notify FREA as changes occur.
- Provide support, guidance, and information for District/Unit Information Services Chairs to share with their local units, on an ongoing basis.
- Attend FREA Board of Directors meetings by invitation of FREA President.
- Present reports at August and January Board of Directors meetings
- Present an Annual Report due April 15th.
- Participate as requested at FREA Convention.
- Submit Information Services column for *FREA Bulletin* (July 1st, November 1st, March 1st)
- Act as a District Information Services Chair in absence of one.
- Assist other State Committees as requested
- Maintain active participation with local unit.
- Perform other duties as stated in FREA Standing Rules.

Responsibilities of DISTRICT Information Services Chair (position currently inactive)

- Maintain an accurate contact list of unit Information Services chairs.
- Provide personal contact information to unit chairs
- Pass any local information changes on to FREA in a timely manner.
- Share information received from STATE Information Services Chair with units in a timely manner.
- Assist District Director as requested at the District Symposium
- Complete requested reports and turn in to State Chair as requested.
- Maintain active participation with local unit.

Responsibilities of UNIT Information Services Chair

- Arrange for Information Services programs and/or handouts at each unit meeting.
- Monitor the FREA website and other sources for new activities and reports that may be shared at unit meetings.
- Share information on FREA benefits and discounts with current and prospective members.
- With permission from the unit president, invite representatives from various organizations specializing in information important to retirees. to present at unit meetings.
- Attend meetings of local unit and work with the unit president and executive board to develop and support unit and state activities.
- Maintain communication with District and/or State Information Services Chair.
- Complete and submit requested reports to District Chair by due date.
- Maintain active participation with local unit.
- Work with the Unit President and Executive Board to develop and support unit activities
- Monitor the FREA website and District/ State Information Services Chair emails for information to share with members
- Access AMBA and FRG Benefits information to share with members.
- Be willing to assist other committees that need information shared.
- Perform other duties as defined by the Unit Bylaws or as necessary.

FREA Legislative Committee

The Legislative Committee of Florida Retired Educators Association works diligently and cooperatively to inform lawmakers of the needs of its membership to live economically secure and healthy lives. Committee members communicate in an ongoing manner with FREA members, keeping them informed on legislative issues that affect their daily lives.

Legislative Priorities:

The Legislative Chairs meet at least once a year to review the Legislative Priorities. This list of priorities will include, but are not limited to, maintaining benefits for retired school employees: pensions, health insurance subsidy, Cost of Living Adjustment (COLA) etc. The priorities will also include the safety of students and maintaining funding for public education.

Responsibilities of STATE Legislative Chair

- Use the FREA.org website to encourage and train units to understand and use the legislative priorities, advocacy strategies and resources.
 - Select District Legislative Chairs (2-year term) and notify FREA by Aug 1st
 - Maintain an accurate contact list of District Legislative Chairs.
 - Contact District Legislative Chairs on a regular basis. Provide support, guidance, and information to be shared with local units.
 - Attend FREA Board of Directors meetings by invitation of FREA President.
 - Present reports at August and January Board of Directors Meetings
 - Present an Annual Report due April 15th.
 - Report directly to President Elect
 - Participate as requested at FREA Convention
 - Maintain active participation with local unit.
 - Perform other duties as stated in FREA Standing Rules

Responsibilities of DISTRICT Legislative Chairs:

- Use the FREA.org website to encourage and train units to understand and use the legislative priorities, advocacy strategies and resources.
- Maintain continuous contact with local senators and representatives in order to be personally recognized by the elected official.
- Invite elected officials to attend district meetings.
- Maintain an accurate list of Unit Legislative Chairs.
- Communicate FREA Legislative priorities to the membership through the Unit Chairs.
- Communicate legislative issues that will affect the members. Contact the Unit Chairs.
- Develop questions for state and local legislators/candidates regarding their position on FREA's priorities.
- Share legislators/candidates answers to questions with the membership through the unit chairs.
- Develop partnership strategies with other organizations that have mutual legislative priorities.
- Encourage the membership to become active on issues pertaining to FREA priorities through person contact, emails, letters, phone calls etc.
- Assist District Director as requested at the District Symposium
- Participate in annual trip to Tallahassee
- Maintain active participation with local unit.

Responsibilities of UNIT Legislative Chairs

- Use the [FREA.org](https://www.frea.org) website to encourage and train members to understand and use the legislative priorities, advocacy strategies and resources.
- Maintain continuous contact with local senators and representatives develop relationship.
- With permission from the Unit President, invite elected officials to attend local unit meetings
- During election years, have local candidates speak with your Unit membership
- Communicate legislative issues that will affect the members.
- Encourage the membership to become active on issues pertaining to FREA priorities through personal contact, emails, letters, phone calls etc.
- Maintain active participation with local unit.

DRAFT

FREA MEMBERSHIP COMMITTEE

The primary objective of this committee is to *Recruit/Retain/Reclaim* FREA members. FREA is a unified organization. All Unit members should also be State Members. FREA Benefits are only available to STATE Members. FREA supports unit efforts providing posters, unit specific informational packets, etc. upon request.

Responsibilities of STATE Membership Chair

- Report directly to President Elect.
- Select District Membership Chairs (2-year term) and notify FREA by August 1st. (State Chair option)
- Maintain an accurate contact list of Membership Chairs and notify FREA as changes occur.
- Provide support, guidance, and information for District/Unit Membership Chairs to share with units, on an ongoing basis.
- Attend FREA Board of Directors meetings by invitation of FREA President.
- Present reports in August and January Board of Directors meetings
- Present an Annual Report due April 15th.
- Participate as requested at FREA Convention.
- Maintain active participation with local unit.
- Submit Membership column for *FREA Bulletin* (July 1st, November 1st, March 1st)
- Act as District Membership Chair in absence of one.
- Assist other State Committees as requested
- Perform other duties as stated in FREA Standing Rules.

Responsibilities of DISTRICT Membership Committee Chair (position currently inactive)

- Maintain an accurate contact list of unit membership chairs
- Share information received from STATE Membership Chair with unit members as directed and in a timely manner.
- Turn in requested reports to the State Chair by due date.
- Maintain active participation with local unit.

Responsibilities of UNIT Membership Chair

- Encourage State Only members, i.e., those recruited by AMBA or FRG to join local unit.
- Ensure New Member Registration forms and payment are sent into FREA in a timely manner. Retain a copy.
- Encourage members to support FREA and renew their annual membership early. Labels are sent to Unit Treasurers. FREA begins collecting state dues March 1st. Early renewal saves FREA time and money.
- Report any deceased members to FREA directly (No form needed). info@frea.org
- Maintain up-to-date list of all Unit members
- Attend local unit meetings and work with the unit president and executive board to develop and support unit and state activities.
- Work with unit treasurer to ensure FREA has correct contact information for unit members. Members should review and update contact information annually on the FREA website if possible.
- Complete reports and turn in by due date.
- Maintain active participation with local unit.
- Maintain a master list of all unit members with emails

- Set up a caller list of paid members without emails
- Contact Unit members via email, USPS, or phone regarding dues renewal.
- Run labels and name tags as needed
- Contact new retirees in the unit's area and explain FREA's goals and mission
- Obtain district retiree list from the school district office when possible. You will be notified by State Membership Chair when the FRS Retiree list is available.

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

FREA/FREF Awards and Opportunities with Membership Component

- The number of STATE members in each-unit as of January 31st of each year will be used to determine awards eligibility as well as the number of delegates for each unit.
- **NEW MEMBER CONTEST** (January-December)
- **MEMBERSHIP AWARD** – Must show increase in State Membership (Verified by FREA)
- **MEMBERSHIP GRANT PROPOSAL** Due to FREA March 1st (attention: FREA Treasurer)

FREA VOLUNTEER SERVICES COMMITTEE

The FREA Volunteer Services Committee encourages FREA members to continue their public service by providing and encouraging opportunities to serve their local communities as retired educators. Local Units are encouraged to participate in FREA statewide projects like The Margaret Poppell Project for Literacy, but Units are also encouraged to create service projects and to ask members to track volunteer hours completed on an individual basis.

Note: While FREA considers time spent caring for grandchildren, elderly parents, or other family members as very important, these activities are family obligations and would not qualify as volunteer hours.

By tracking volunteer hours, members show that volunteer programs help to achieve the objectives of FREA.

Responsibilities of STATE Volunteer Services Chair

- Report directly to President-Elect.
- Select District Volunteer Services Chairs (2-year term), and notify FREA Office of any changes by August 1st, or as soon as changes occur.
- Maintain an accurate contact list of District Volunteer Services Chairs.
- Provide support, guidance, and information for District Volunteer Services Chairs to share with ~~their~~ local units, on an ongoing basis.
- Attend FREA Board of Directors meetings by invitation of FREA President.
- Present reports for August and January Board of Directors Meetings.
- Present an Annual Report due April 15th.
- Participate as requested at FREA Convention.
- Maintain active participation with local unit.
- Submit the Volunteer Services column for each FREA bulletin (due July 1, November 1, and March 1).
- Act as a District Volunteer Services chair in the absence of such.
- Assist other State Committees as requested.
- Perform other duties as stated in FREA Standing Rules.

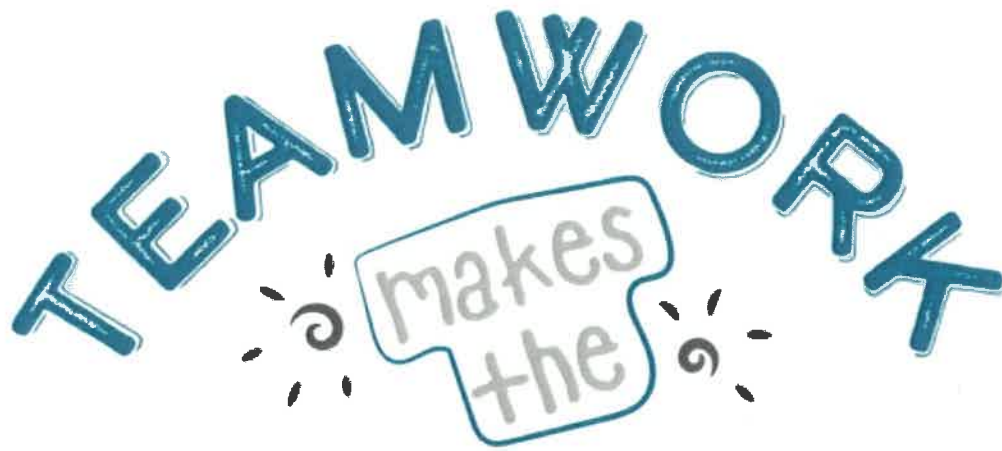
Responsibilities of DISTRICT Volunteer Services Chair

- Maintain an accurate contact list of Unit Volunteer Services Chairs.
- Provide personal contact information to Unit Volunteer Services Chairs.
- Inform FREA and the State Volunteer Services Chair of any personal or local unit contact changes.
- Contact Unit Volunteer Services Chairs on a regular basis, providing support, guidance, and information for them to share with their members.
- Assist District Director as requested at the District Symposium.
- Review annual data reported by local units and send to the State Volunteer Services Chair for compiling by April 1.
- Select one winner for Volunteer of the Year from local submissions. This may be done by committee. Notify the District winner of his/her selection so that he/she may register for the annual FREA convention if not already done so. Report this to State Volunteer Services Chair by April 1.
- If you have participating units, select one winner from entries submitted for the 5th Grade Essay Contest and report to State Chair by April 1st. Ensure that the winner's form is complete, and that the winner's photo is attached.
- Turn in all completed Volunteer Services reports to the State Chair on time by April 1st.

- Participate in a TBA (To Be Announced) conference call or virtual session if arranged by the State Chair.
- Email contact information to the State Chair by November 1st or whenever information changes. Contact information should include: Name, Position, Local Unit, District, Address, City/State/Zip, Home Phone, Cell Phone, E-mail
- Maintain active participation with local unit.

Responsibilities of UNIT Volunteer Services Chair

- Encourage members to become volunteers in their local communities. Emphasize opportunities that encourage literacy.
- Ask members to track volunteer hours and submit them either monthly or annually by the end of February. With Our Youth hours can qualify for an award by AARP; please report them separately if possible.
- Attend all local Unit meetings and work with the Unit President and Executive Board to develop and support local volunteer projects.
- Complete the Unit Volunteer Services Report and Unit Volunteer of the Year Nomination form and submit to the District Chair by March 15th.
- Encourage your local Unit to show appreciation and recognition to your Volunteer of the Year and encourage attendance at the annual FREA Convention.
- Encourage 5th Grade public school students, Teachers, and Administrators to participate in the 5th Grade Essay Contest.
- Complete the 5th Grade Essay Contest Cover Page in its entirety with an attached student photo and updated home address.
- Participate in conference calls or virtual sessions if arranged by the State Volunteer Services Chair.
- Email personal contact information to FREA and the State and District Volunteer Services Chairs by November 1st or as soon as the information changes. Contact information should include: Name, Position, Local Unit, District, Address, City/State/Zip, Home Phone, Cell Phone, E-mail
- Maintain active participation with local unit.



UNIT POSITIONS WITH SUGGESTED RESPONSIBILITIES

FREA recognizes that our units, members, and communities each have unique strengths and talents. Some Unit Position suggestions and responsibilities are listed for your consideration, however you are encouraged to “think out of the box” and assign responsibilities in a manner that works for you.



Unit Officer Responsibilities

As Unit President

Responsibilities to the Unit and the State

Unit

- Reserve and confirm meeting rooms for Executive Board and General meetings. Publish a list of the scheduled meetings for membership.
- Plan engaging meetings with assistance of Executive Board.
- Publish meeting agendas. (Maintain copies for 2 years.)
- Preside at Unit Executive Committee 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
- 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 virtual training for the unit membership.
- Personally attend the Convention, if possible. Encourage Unit membership to attend.
- Review and update Unit Bylaws every 2 years in accordance with the FREA Bylaws.

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 two years in accordance with the FREA Bylaws.

Unit President-Elect/Vice President

Responsibilities to the Unit and the State

Unit

- Attend Executive Board 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

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As Unit Treasurer

Responsibilities to the Unit and the FREA State Office

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 Board and at the Unit meetings. Work with EC to develop yearly budget.
- Coordinate audit of accounts at end of fiscal year (June 30th).
- 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.

FREA

- Use “Unit Membership Dues Form” to transmit dues and updated contact information to FREA office as dues are collected. The form is available from the state office and website. 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 Unit Recording Secretary

Responsibilities to the Unit

Unit

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

Unit Corresponding Secretary/Sunshine Chair

Responsibilities to the Unit

Unit

- Attend Executive Board and unit meetings. Work with Unit President and Executive Board 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

Responsibilities of UNIT Volunteer Services Chair

- Encourage members to become volunteers in their local communities. Emphasize opportunities that encourage literacy.
- Ask members to track volunteer hours and submit them either monthly or annually by the end of February. With Our Youth hours can qualify for an award by AARP; please report them separately if possible.
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- Encourage 5th Grade public school students, Teachers, and Administrators to participate in the 5th Grade Essay Contest.
- Complete the 5th Grade Essay Contest Cover Page in its entirety with an attached student photo and updated home address.
- Participate in conference calls or virtual sessions if arranged by the State Volunteer Services Chair.
- Email personal contact information to FREA and the State and District Volunteer Services Chairs by November 1st or as soon as the information changes. Contact information should include: Name, Position, Local Unit, District, Address, City/State/Zip, Home Phone, Cell Phone, E-mail
- Maintain active participation with local unit.

Unit FREF Scholarship Chair

Responsibilities to the Unit and the State

Unit

- Attend Executive Board and Unit meetings. Prepare report for each meeting.
- Work with Unit President and Executive Board 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

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.



Florida Retired Educators
Foundation, Inc.
(FREF)



Florida Retired Educators Foundation, Inc. (FREF)

What is FREF?

The Florida Retired Educators Foundation (FREF) is an autonomous branch of FREA. It is a 501(c)3 not-for-profit corporation chartered by the State of Florida in 1984.

FREF Mission Statement

Awarding scholarships to students majoring in education, grants for current educators' classroom projects, and fiscal assistance to retired educators in crisis.

Purpose of FREF

The purposes for which the Foundation is organized are: (1) to encourage, receive and administer contributions, gifts, bequests, and grants of funds and property for scientific, educational and charitable purposes, and (2) to disburse funds for the above stated purposes.

How is FREF Organized?

The FREF Board of Trustees consists of ten 10 district representatives (Trustees), who are elected by their district for a three-year term. Each Trustee can serve a total of three terms. The Chair of the FREF Board of Trustees is an ex-officio member of the Board of Directors of FREA.

Where does the Foundation get its funds?

- **Donations for a named scholarship**

Individuals or organizations may donate a minimum of \$10,000 to the Foundation in order to have a named/designated scholarship. The donor can specify how the scholarship can be awarded (i.e., must be awarded to a student from a specific Unit of FREA or a specific District). These donated funds will be invested and when the interest accrued is sufficient to fund a scholarship, one will be awarded. The student is selected in accordance with FREF selection evaluation procedures. Gifts to the Foundation are deductible as charitable contributions on Federal Income Tax returns.

- **Unit Contributions**

Units are required to donate at least \$2.00 per paid local unit member. In addition, units are asked to make annual gifts in memory or honor of individuals. Unit contributions to the Foundation are part of the criteria for earning an annual Certificate of Recognition.

- **Fundraising**

FREF Trustees and local Unit FREF chairs raise funds for the Foundation by selling Extravaganza tickets, fundraisers at the District Symposiums and activities at the annual FREA Convention (Dollars for Scholars, Country Store, etc.)

Responsibilities of the STATE FREF Chair

- Preside over State FREF Board meetings.
- Attend State FREA Board meetings, as an ex-officio member.
- Provide orientation for new Trustees. **If a District Trustee has not been selected, ensure units are notified of pertinent information.**
- Establish committees and assign committee chairs.
- Stay in constant contact with the Trustees and State FREA Office.
- Maintain active participation with local unit.
- Perform other duties as stated in FREA Standing Rules

Responsibilities of DISTRICT Trustee

- Attend all required state meetings.
- Visit all local units included in the district.
- Share all pertinent information you receive from the FREF Board and FREA with local units—scholarships (process and deadlines), practicing educator grants, financial assistance for retirees in financial crisis, process for receiving a unit award, etc.
- Attend District meetings and deliver current FREF information to all members in or of the district.
- Complete requested reports and send to FREF Chair.
- Maintain active participation with local unit.

Responsibilities of UNIT Scholarship Chair

- Stay in contact with the District Trustee.
- Keep local unit informed of the purpose of FREF.
- Create fundraising ideas to earn money for FREF, in addition to the sale of Extravaganza tickets.
- Communicate state scholarship information to local high school contacts.
- Form a committee to interview and select a nominee for the state scholarship program.
- Inform local unit about Practicing Educator Grants and assistance for retirees in financial crisis.
- Inform local unit of the criteria for receiving a Certificate of Recognition.
- Maintain active participation with local unit.

FREF Scholarships and Grants

Benefitting Past, Present, and Future Educators

FREF Scholarships - Future

FREF awards scholarships to graduating high school seniors who wish to become teachers. Each FREA Unit may submit one scholarship applicant per year. A second application may be submitted if a Unit has a named scholarship, and it is available for that year. Contact the FREA office to check on the scholarships availability.

FREF scholarships pay \$,4000.00, \$1,000 a year. Checks are mailed directly to the colleges/universities. the institution. For each year recipients accept the scholarship, they are required to teach one year in the State of Florida or repay the money at 5% per annum.

Each Unit designates an FREF scholarship chair whose responsibilities include distributing the scholarship application to local high schools, reviewing applications, interviewing applicants, selecting the Unit applicant(s) and submitting the application(s) to FREF. Unit FREF chairs are urged to organize a scholarship committee for this process.

In March, the FREF Board of Trustees reviews and scores applications submitted from all Units in Florida. The number of scholarships awarded in any year is dependent on the amount of funds available in the FREF portfolio. Scholarship recipients receive their funds prior to the fall term of college.

Practicing Educator Grant - Present

Each year FREA awards one or more \$1,000 grants to practicing educators who have a classroom project that needs funding. Applicants submit an application, essay, and letters of recommendation to be considered for the grant. The winners are chosen by the FREF Trustees at the March meeting.

Retired Educators in Financial Crisis - Past

FREA members who are facing a financial crisis due to a catastrophic event may apply for emergency financial aid from FREF. The individual must be a member of FREA for at least five years to be eligible. An application for aid must be submitted to the President of the local unit who will assess the application. After review, the application is sent to the Chair of the FREF Board of Trustees and later to the FREF Board of Trustees to determine merit. If authorized by the FREF Board, a check will be sent directly to the individual. This financial aid is in the form of a gift. If the individual later becomes able and wants to repay the Foundation, a donation or bequest to the Foundation would be appreciated. The local Unit President will receive a confidential report on the outcome of the request.