
FLORIDA RETIRED EDUCATORS ASSOCIATION HANDBOOK AND INFORMATION GUIDE



8950 9th St. N. #105
Saint Petersburg, FL 33704
www.frea.org ~ 727-577-6400 ~ info@frea.org



GREETINGS FROM THE FREA PRESIDENT



Dear FREA Member,

I am honored to share with you our FREA Handbook. The objective of the committee, in compiling the information, is to insure there is continuity throughout our units of the processes we use to conduct our business and complete our responsibilities. The information was 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), AARP's educational community. Ethel Percy Andrus founded NRTA and AARP, 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 our 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 FREA Unit.

Sincerely,

Edwinna Williams,
President FREA



FREA HANDBOOK COMMITTEE

Edwinna Williams

FREA President

Harriett M. Jenkins

FREA President-Elect

FREA Handbook Committee Chair

Committee Members

Diane Bassett

Anne Fagan

Karla Brogdon

Carrie Frye

Vicki Coleman

Donna Harper

Susan Darovec

Jody Scruggs

Linda Edson

Cecelia Solomon

George Ellis



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FREA MISSION STATEMENT

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 for carrying out the FREA Mission

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:

- Promote FREA website, Facebook page
- 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!



HISTORY OF FLORIDA RETIRED EDUCATORS ASSOCIATION

HISTORY OF FREA

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:

- to promote the economic, social, and professional status of retired educators, and the exchange of information of value to them
- to safeguard and improve retirement benefits by promoting passage of legislation
- 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 PAST PRESIDENTS

<i>Mr. Paul D. Phillips</i>	1954-56	<i>Dr. Thomas A. Backus</i>	1986-87
<i>Mrs. Katherine Palmer</i>	1956-57	<i>Dr. Mary L. Zellner</i>	1987-90
<i>Dr. Ralph L. Eyman</i>	1957-59	<i>Dr. Paul L. Hanna</i>	1990-90
<i>Dr. A. R. Mead</i>	1959-61	<i>Dr. Merle H. Morgan</i>	1990-94
<i>Dr. Ralph L. Eyman</i>	1961-63	<i>Mrs. Sarah "Sally" M. Talbert</i>	1994-96
<i>Mr. L. C. Harwell</i>	1963-65	<i>Mrs. Anne U. Bullock</i>	1996-98
<i>Mrs. Mary W. Smith</i>	1965-65	<i>Dr. Robert H. Miller</i>	1998-00
<i>Miss Nina F. Fowler</i>	1965-67	<i>Mr. Larry L. Carmichael</i>	2000-02
<i>Mr. M. O. Worthington</i>	1967-69	<i>Mrs. Mildred S. Dunlap</i>	2002-04
<i>Dr. Ballard Simmons</i>	1969-71	<i>Mrs. Jan M. Colcord</i>	2004-06
<i>Mr. Ed B. Henderson</i>	1971-72	<i>Mr. Edward W. Ethridge</i>	2006-08
<i>Mr. R. Earl Kipp</i>	1972-74	<i>Ms. Marie E. Grein</i>	2008-10
<i>Mrs. Clara Louise Smith</i>	1974-76	<i>Mrs. Esther Twitchell</i>	2010-12
<i>Miss Wilma Simmons</i>	1976-78	<i>Mrs. Thelma Mosley</i>	2012-14
<i>Dr. William A. Gager</i>	1978-80	<i>Mrs. Catherine McCartney</i>	2014-16
<i>Mrs. Betty F. Zentgraf</i>	1980-82	<i>Mr. Roger Cuevas</i>	2016-18
<i>Mrs. Ruby G. Buck</i>	1982-84	<i>Mrs. Pam Schwartz</i>	2018-20
<i>Mrs. Lucile M. Doyle</i>	1984-86	<i>Mrs. Nancy Hosie</i>	2020-22

(Italics denote deceased)

*Leadership is having a compelling vision,
a comprehensive plan,
relentless implementation,
and talented people working together.*
Alan Mulally



WHAT IS FREA?

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 47 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



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.

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

Diane Lynch
 Membership and
 Accounting Specialist
Diane@frea.org

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:

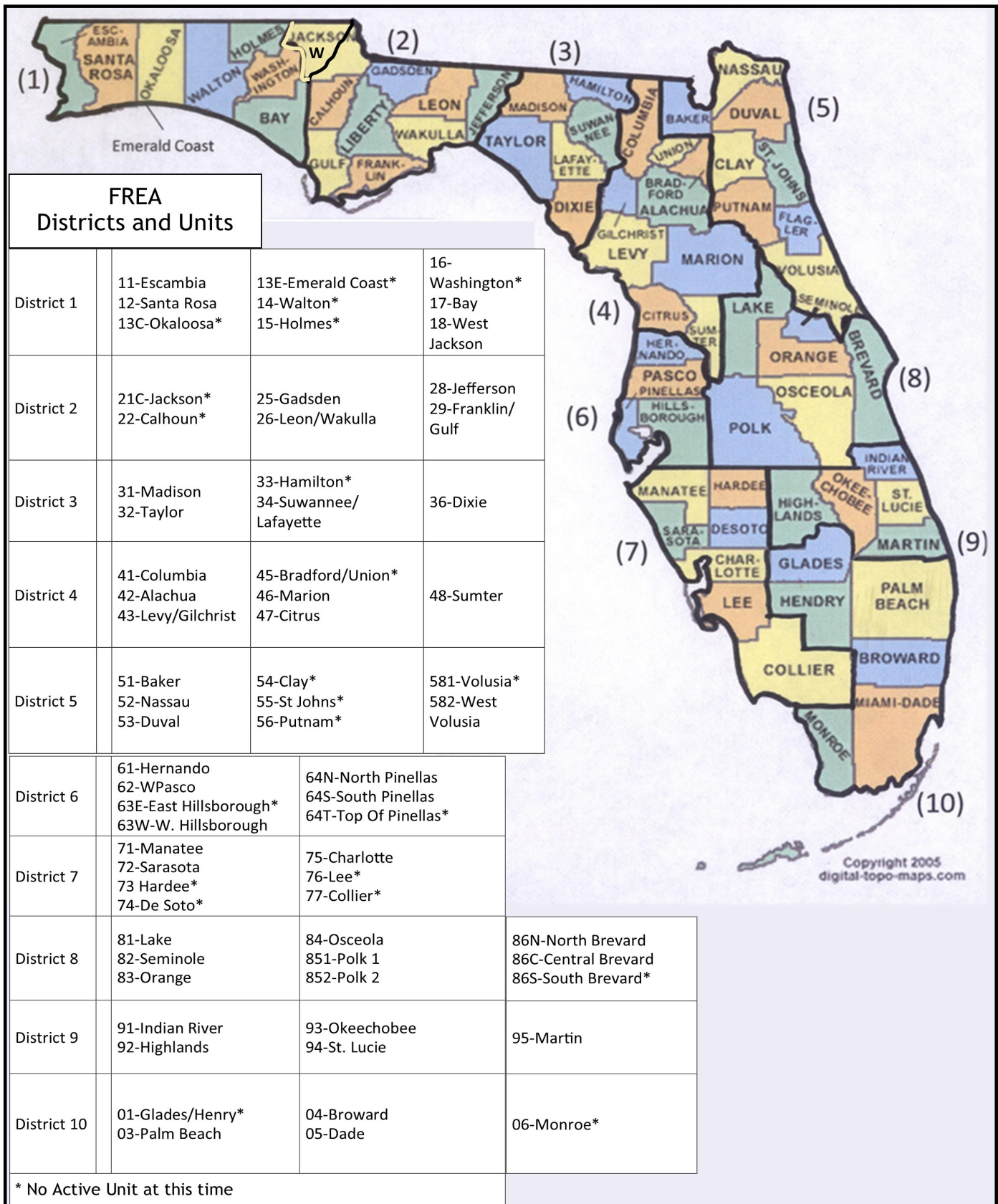
FREA State Office - The FREA state office is the administrative headquarters of the association. It is staffed by an Executive Director and Membership Accounting Specialist. The state office is responsible for the day-to-day operations of FREA, and the implementation of policies and programs as approved 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 47 local units. They adhere to the requirements of the state Bylaws. Local unit members are made up of education and school personnel retirees, plus others who believe in our Mission. Our Units are very important to us, and the State Office strives to provide a strong support system for Units.



FREA DISTRICT AND UNIT MAP





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.”

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.

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.



FREA ORGANIZATIONAL CHART

FREA Executive Committee

7 Members

President

President-Elect

State Director

Treasurer

Secretary

District Director Rep 1-5

District Director Rep 6-10

*President's Invited Guests

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

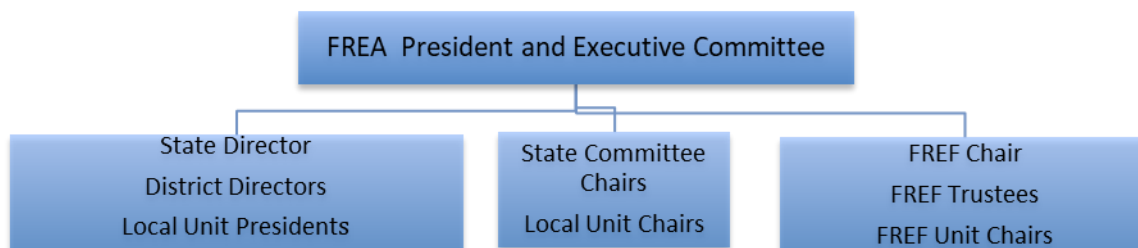
6 Members

By-Laws Information Services Legislative

Membership Nominations Volunteer Services

Ad Hoc Committees

Necrology Recruitment Convention





FREA/FREF UNIT REPORTS AND ACTIONS CALENDAR

FREA/FREF Reports-Actions Calendar

Date	Report	Responsible	Destination
VIF—Very Important Form: Report of Contact Info for Unit Officers and Meetings —send to Office after election of officers and when any meeting times, locations, change.		Unit President	FREA Office
January 1	Deadline for any Unit Dues Increase is due to the Office to be included in the Membership renewal notice for the upcoming year.	Unit President	FREA Office
January 31	Deadline for Membership for Convention Delegates	Membership Chair/ Unit President	FREA Office
Jan/Feb FREA Board Meeting	Unit Contact Progress report	State Committee Chair	FREA President-Elect
	Potential Leadership Candidates	District Directors	Give at meeting to State Director
March 1	Membership Grant Proposals	Unit Membership Chair	FREA Office
	Return Convention Delegate Names to Office	Unit President	FREA Office
	FREF Scholarship Submittal Deadline from Units	Unit FREF Chair	FREA Office
	Deadline for Practicing Educator Grant	Participants	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	FREF Certificate of Recognition <ul style="list-style-type: none"> Criteria in Handbook 	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
April 15	<ul style="list-style-type: none"> District Directors Annual Report State Committee Annual Report 	District Director State Committee Chair	FREA Office
April 30	Deadline for Units to turn in Extravaganza money and all unsold tickets.	Unit FREF Chair (If no FREF Chair, Unit President.)	FREA Office
	Deadline for Trustee to turn in Extravaganza money for tickets assigned to them.	FREF Trustee	FREA Office
June 10	FREA and FREF Expense Reports due.	All Board and Trustees	FREA Office
August Board Meeting	Unit Contact Progress report	State Committee Chair	FREA President-Elect
	Oral Progress Report	District Directors	Give at meeting
August 31- Sept 30	Scholarship Information to High Schools— Students can apply online—	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 	<ul style="list-style-type: none"> District/Unit VS Chair 	<ul style="list-style-type: none"> All grade schools possible (public) All schools possible (public)
Last week of November	<ul style="list-style-type: none"> Office mails Extravaganza Tickets 	FREA Office	Unit President
	VS = Volunteer Services		



FREA STATE AND UNIT OFFICERS GOALS AND RESPONSIBILITIES



FREA 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 Responsibilities

To serve as a liaison between the FREA Board of Directors and the local units.

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 updates and procedures
- Encouraging local units to submit articles and photos to the FREA office for publication in the *FREA Bulletin*, website, and Facebook page.
- Distributing relevant materials to Unit Presidents
- Assisting Unit Presidents in preparing and submitting all reports in a timely fashion
- Encouraging and assisting local units with membership recruitment and retention activities.

*Education is the movement from
darkness to light.*

Allan Bloom



FREA STANDING COMMITTEES AND PURPOSES

FREA Standing Committees



The 6 FREA Standing Committees include:

- Bylaws
- Information Services
- Legislative
- Membership
- Nominations
- Volunteer Services

Each of these committees has a State Chair 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:

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.

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.

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.

Nominations

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 Nominations 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.

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.

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 ensures that Benefits offered to members meet the criteria as stated in the FREA Standing Rules.



FREA BYLAWS COMMITTEE

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.
- Consider joining National Association of Parliamentarians (NAP) for personal growth.

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.

- State Chair option: Select District Information Services Chairs (2-year term) and notify FREA by August 1st.
- Maintain an accurate contact list of District/Unit Information Services Chairs and notify FREA Office 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 State/District Information Services Chair.
- 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 State/District Information Services Chair emails for information to share with members
- Access AMBA and FRG Benefits information from the FREA website to share with members. These are the only approved benefits providers. No other benefits provider shall be allowed to speak at FREA unit meetings.
- 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

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 FREA members to understand and use the legislative priorities, advocacy strategies and resources.

- Report to the President-Elect
- 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.
- 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 FREA 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 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 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.



FREA MEMBERSHIP COMMITTEE

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 Unit/District 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, if position is active.
- 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 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 mails first dues notice on May 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. The FREA Office will notify when the State FRS list is available

FREA Membership Types:

General Members: Can be selected to be a Delegate, and vote on FREA business at the Annual State Delegate Convention. This includes:

- Teachers/College Professors
- Administrators
- Administrative and Classroom Assistants
- Secretaries, Bookkeepers/ Accountants
- Bus Drivers
- Custodial Personnel
- Cafeteria Workers
- Paraprofessionals and Teacher Assistants
- Educational Retirees from other states who now live in Florida
- Charter School Retirees
- Department of Defense School Employees

Associate Members are any person with an interest in the FREA Mission, and with the exception of not being able to be a Convention Delegate, have all other FREA Membership Benefits available to them.

FREA Membership Awards and Opportunities

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)

*Setting goals is the first step in turning
the invisible into the visible.*

Tony Robbins



VOLUNTEER SERVICES COMMITTEE

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 Office 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. 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/virtual session if arranged by the State Chair.
- Email contact information to the State Chair by November 1st or whenever information changes.

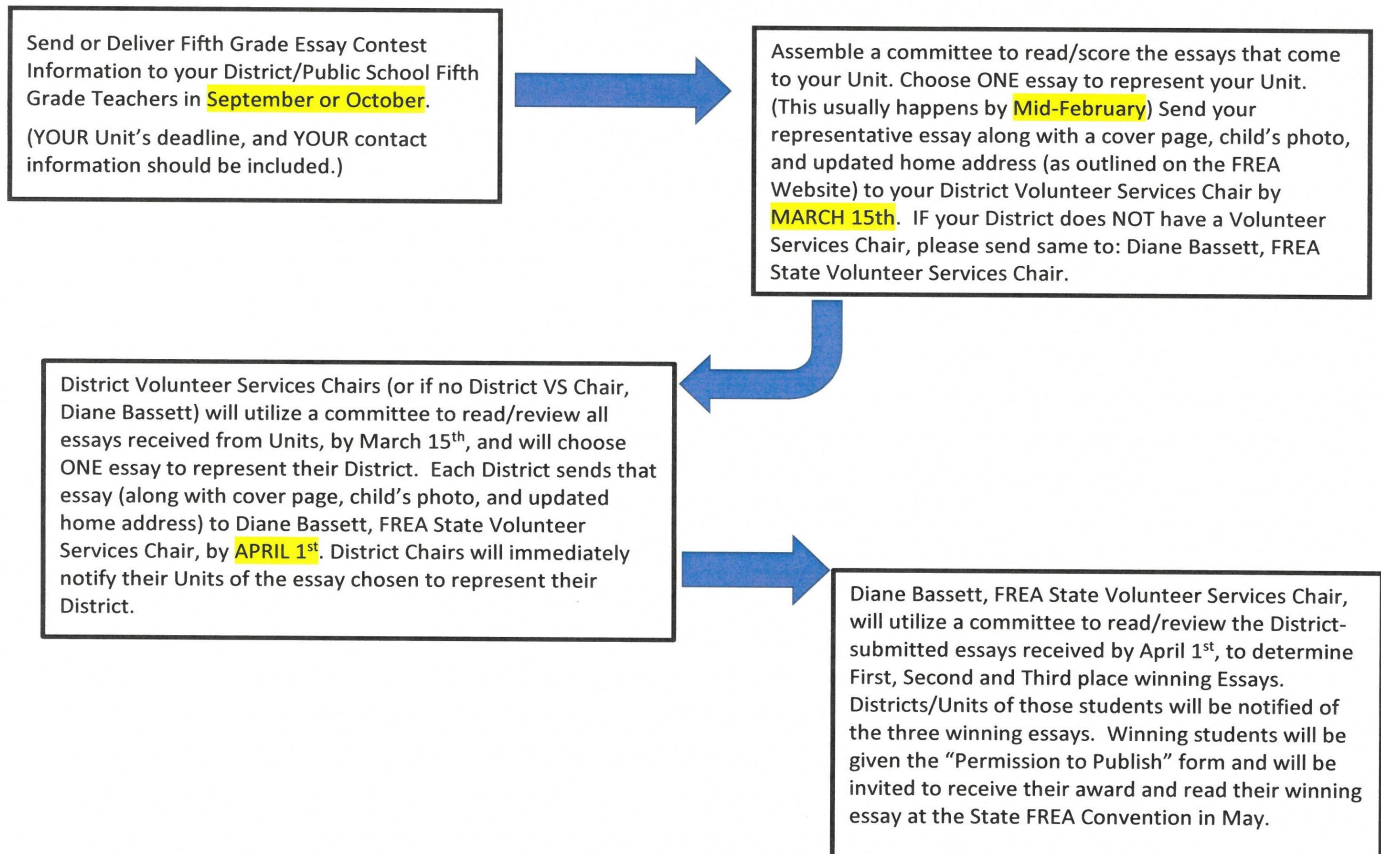
Contact information should include: Name, Position, Local Unit, District, Address, City/State/Zip, Home Phone, Cell Phone, E-mail

- 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.
- If you have an entry, 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.

FREA Fifth Grade Essay Contest Flow Chart



Frequently Asked Questions: Volunteer Services

(VS denotes Volunteer Services.)

What is the primary objective of Volunteer Services (VS)? To encourage volunteerism and the reporting of volunteer hours by all FREA unit members and Members at Large (MAL).

How many FREA districts are in the state? There are 10 (ten) FREA districts in the state. Each district and its local units are listed online at www.frea.org.

What does REA mean on the Individual Member VS Hours Report form? "REA" means Retired Educators Association.

What if my area doesn't have a unit, or I don't belong to one? You may submit your hours on the Unit VS Form found on the website. Just fill in and send to the Office. It will be counted in its own category as MAL.

What services qualify for volunteer hours? Any unpaid services to individuals, groups, or entire communities qualify for volunteer hours.

What are some examples of services that qualify for volunteer hours? Tutoring, judging at science fairs or spelling bees, hospital service, personal help to the disabled, church-related work, serving with: Retired Educators Associations, civic committees and boards, the board of a literacy council, mentoring to high at-risk youth, preparing training materials for a workshop or program, preparing for a scholarship fundraiser, reading to clients at a nursing home, these all qualify for volunteer hours.

Does time spent caring for family members qualify as volunteer hours? While time spent caring for family members is important, these activities are family obligations and would not qualify as volunteer hours.

How should I record my volunteer hours each month? First, follow the instructions of your local Unit VS Chair. Second, if you need the Individual Member VS Hours Report form and/or other volunteer services forms, they are located online at www.frea.org.

When should I submit my volunteer services hours to my local Unit VS Chair? VS hours should be submitted as per the requests of your local Unit VS Chair. Some preferences include the following: Submit your hours monthly, quarterly or at the end of the year. Most importantly, each FREA member should keep an updated ongoing record of their VS hours available to submit if asked.

When are local unit VS reports due to District Volunteer Services Chairs? All VS reports are due to your assigned District VS Chair **by March 15th** who will send it on to the State VS Chair for data collection.

What time frame are VS hours counted? Your VS hours reflect hours served from January – December.

If I volunteered less than twelve (12) months during the year, should I still record and submit those hours? Yes, ALL VS hours are valued and should be counted in your Total Unit hours.

Is each reporting FREA member counted on the VS report? Yes, each member who submits VS hours is counted and recorded on the Unit VS Report.

Should the District Volunteer of the Year (VOY) Judging Criteria be used by the Local Unit as a guideline when completing the VOY nomination form and selecting their winner? It is the discretion of the local unit and its VOY committee to create their selection method. The District VOY Judging Criteria Form is used by the District VOY Committee in determining the District VOY winner.

Are all VS forms and information updated on our www.frea.org website? Yes, all online VS forms and information are current.

What should be submitted to the District VS Chair by March 15th? The Unit VS Report, Unit VOY Nomination form with attachments, and one 5th Grade Essay Contest winning entry with Cover Page, student photo and updated home address should be sent to your District VS Chair.

When should 5th Grade teachers and/or schools be contacted regarding the 5th Grade Essay Contest? Contact all school officials at the beginning of the school year to encourage their participation and solicit support.

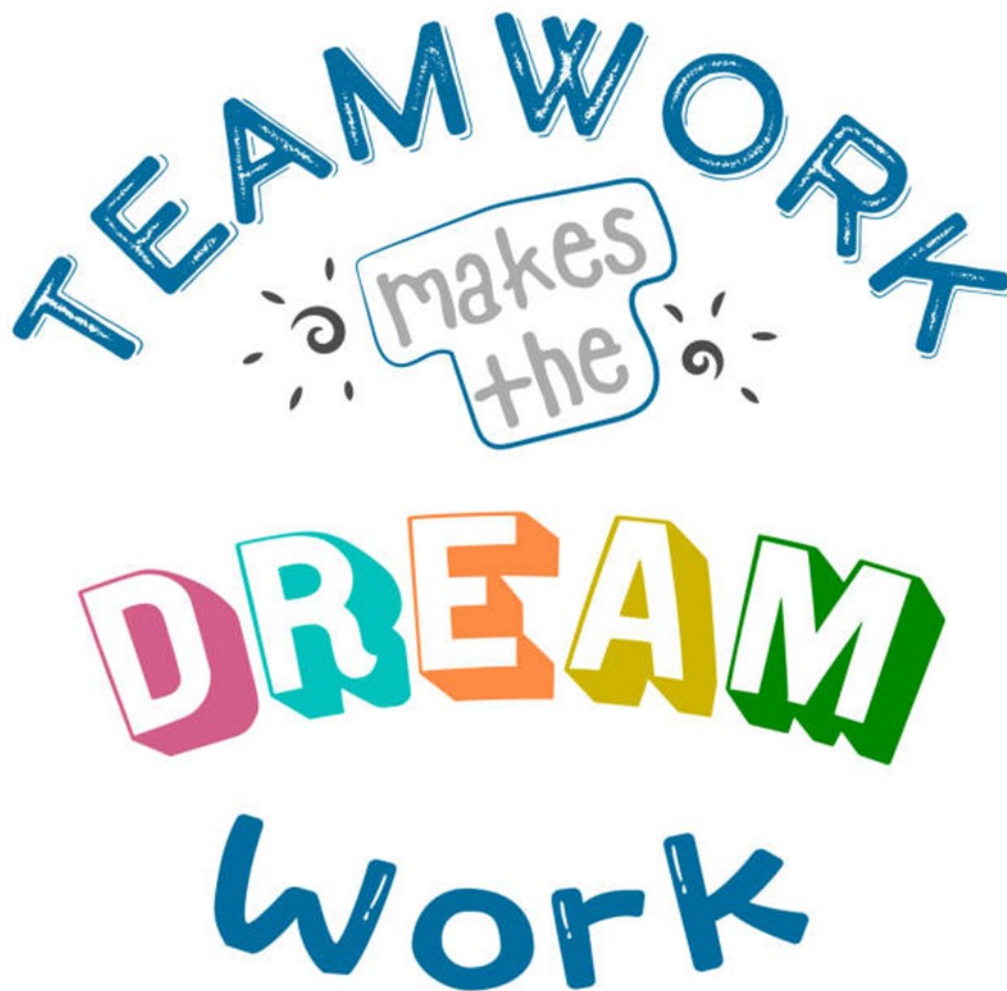
What is the 5th Grade Essay topic? Students must describe an experience or experiences with a grandparent (s) or grandparent figure (s).

What prizes are awarded to the 5th Grade Essay Contest winners? The State Winner will be awarded \$150.00 and a poster of their winning essay. Second and third place winners also receive the poster, and receive \$100.00 and \$50.00, respectively.

When must District VS Chairs reports be sent to the State VS Chair? District VS Chairs must submit their reports to the State VS Chair by April 1st.

Should the District VS Chair complete the VS District Chair Reporting Form when submitting all VS district reports? Yes

When is the VS District Chair Reporting form due to the State FREA VS Chair? By April 1st



UNIT OFFICERS WITH SUGGESTED RESPONSIBILITIES

FREA recognizes that our Units, members, and communities each have unique strengths and talents. Some Unit Officer 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 Committee Chairs are listed in the Standing Committees Section.



HOW TO KEEP YOUR UNIT VITAL, GROWING, AND STRONG

How do you keep your Unit vital, strong, and growing?

Stay connected using the 4 C's:

Concern, Community, Communication and Change.

One of the best ways to keep your Unit vital, strong, and growing is to stay connected using the 4 C's.

4- C's: Change, Concern, Community, and Communication. Below are ways to do this, thought of by your fellow FREA members. They can be adapted, made your own, or used as is.

Membership Ideas: BE Positive, Be Proactive, Be Open to new ideas

- Build value in your membership and Units by building a cause/service project for people to support.
- Ask the question in your Units, "Is \$50* a year too much to ask to protect your pensions?" (Use your Unit's annual renewal rate*)
- Tell a friend to bring a friend, each one brings one.
- Survey your members for likes and dislikes: why did you join?
- Develop a Facebook page; a newsletter to advertise your mission and good service projects; highlight fun events with lots of pictures.
- For those that are missing from your meetings, send cards, pick up the phone and call, tell them you missed seeing and talking with them. Divide the list among your Unit's board members and have a chat session with the missing members. Invite them over for a breakfast, lunch, or meet at a restaurant.
- Use the Wednesday Wisdom webinars with to interest membership.

Meeting Ideas

Do the business of the Unit in the Board meetings. If members are interested, they can attend, but many potential and current members just want to have a social or community service or visit to an attraction opportunity.

- Hold events, not meetings.
 - Plan events/meetings that are informative and fun-filled.
 - Provide "no cost" entertainment and/or speakers at each event/meeting.
 - Distribute monthly and yearly calendars of events to help members plan ahead.
 - Communicate results of each Needs Assessment to generate member's interests.
 - Recite the FREA mission regularly.
 - Send a monthly newsletter to the membership via email or US postal mail.
- Use local businesses to sponsor printing, postage, meals, etc. to notify your members.
- Use social media to advertise meetings as well as phone calls, and emails. send reminders a day or two before meetings.
- Conduct Tuesday Technologies Trainings to train your membership on how to email, use smart phones, use the FREA website. AARP has speakers that can be booked to educate and train members on technology.
- Tune into webinars, and zoom meetings telling how to download the links to access Passport, an AMBA resource on saving money on travel, restaurants, and shopping.

- Mail out your newsletters to Superintendents, School Board members, School Principals in your area, plus local legislative teams including House and Senate.
- Partner with other Units for joint meetings as well as other organizations.
- Use radio, community newspapers and TV spots to advertise meeting locations and days of the meeting as well as service projects, example: bring a book for RIF or bring food for the food bank.
- Movie nights with popcorn,
- Wine and cheese events, “Y’all come over”.
- Tea-Time events are popular too!
- Hold hybrid meetings with a computer and wide angled cameras with speakers to send out a zoom meeting to members unable to attend in person.
- Zoom Speakers: Physical therapists, Women veterans groups, Abused Women Shelter speakers, Haunted house tours via zoom, Speakers from the Arts: authors, painters, Presenters on Human trafficking, Tai Chi exercise.

Marketing Your Unit:

- Use Facebook. It is easy to set up a page for your Unit.
- Create social events, travel and local trips to see area venues and museums.
- Spotlight a Unit Member in your newsletters; bus driver, secretary, office staff, teacher, cafeteria worker, coach, paraprofessional.
- Invite the Supervisor of Elections to present updates on voting in your area.
- Host a Happy Hour on Zoom and play Trivia games. Advertise on your Facebook page.

Volunteering Ideas

- Service projects include books for children (Margaret Poppell Project), new teacher classroom libraries,
- Supplies for back packs in August and January,
- Soap, paper towels, disinfectant wipes for schools/ homeless shelters,
- Canned items for food banks,
- Local blind groups need volunteers, foster animals in shelters, Ronald McDonald House, SMART volunteers to take care of horses.
- Mentoring High School students to go to trade schools, or colleges.
- Record and submit your time invested in preparing newsletters, writing emails and letters to legislators.
- Working at churches, local service organizations,
- Habitat for Humanity handing out water and supplies,
- Adult literacy programs like *Learn to Read* or ESOL classes,
- Guardian ad Litem volunteers and trainings,
- Political groups meetings and volunteer work,
- Submit your volunteer hours and include driving time and computer times.
- Put up a table at local club gatherings give out small items with your Unit names on them, water bottles, (example Tiger Bay club, Explorers club etc.). Palm Beach CREA has personalized pens
- Volunteer to judge events, History Fair, Science Fairs etc.

Fundraising Ideas

- Call the event a “Fun Raiser”.
- Bingo, craft making activities, cooking demonstrations (send out a list of needed ingredients, craft supplies, Bingo cards prior to the meeting).
- Scholarship fundraising: on-line auctions: “Time to downsize to a simpler lifestyle”. Sell Unit pens.
- Auction items you no longer need (and your heirs do not want) online or at the meetings in person.
- Pass the basket for spare change at meetings and events.
- 50/50 - Buy a ticket (chance) to win 50% of the money donated.



FREA UNIT PRESIDENT

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. (See the 4 C's)
- Publish meeting agendas. (Maintain copies for 2 years.)
- Preside at Unit Executive Committee and general membership meetings.
- Organize unit committees as defined by State and 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.
- Keep members current 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 compliance with the FREA Bylaws.

FREA

- Be very familiar with the FREA/FREF Unit Reports-Action Calendar (in this Handbook). It contains dates for deadlines on required actions and reports listed below. All reports are available on the website on the Unit Info and Forms page.
- Use "Unit meeting and Officer Contact Information" report to notify FREA of unit officers whenever change occurs.
- Send convention delegate information to FREA when you receive the letter from the office in February.
- Work on Certificate of Recognition criteria with FREF Chair. Send donations to FREA Office following guidelines.
- Keep in touch with District Director. Contact them with questions and concerns.
- Review and update Unit Bylaws every two years in accordance with the FREA Bylaws.



FREA UNIT PRESIDENT-ELECT/ VICE PRESIDENT

Unit President-Elect/Vice President Responsibilities to the Unit and the State

Unit

- Attend Executive Board and Unit meetings. Work with Unit President and Executive Board or Committee to develop and support unit and state activities.
- 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

I truly believe that everything that we do and everyone that we meet is put in our path for a purpose. There are no accidents; we're all teachers - if we're willing to pay attention to the lessons we learn, trust our positive instincts and not be afraid to take risks or wait for some miracle to come knocking at our door.

Marla Gibbs



FREA UNIT TREASURER

Unit Treasurer Responsibilities - Each Unit may have its own system. This list may be adapted as a guideline. Please contact the FREA Office if you have any questions. If need be, the FREA State Treasurer will be consulted.

1. Collect funds, write receipts, record, update mailing lists, deposit funds:

- Unit dues,
- FREA dues,
- FREF Contributions,
- Scholarship Contributions,
- Special unit donations/ other special collections, and
- Luncheon/ District meeting fees.

2. Pay any invoices or reimburse expenses that are presented to the Association:

- Maintain files of all paid bills for yearly audit (include paid date, check # on receipts and invoices),
- Present and maintain a monthly report at the general membership meetings,
- No reimbursement for state tax,
- Maintain monthly reports for audits,
- Maintain files of all receipts and invoices for audit, and
- Remit FREA's portion of dues in a timely manner using appropriate forms.

3. Reconcile monthly bank statement listing all outstanding checks. Maintain an audit file of monthly statements.

4. Fiscal year: July 1-June 30. Prepare a summary of all income and expenditures at close of fiscal year

- Total income by category
- Total expenditures by category
- Recap of Postage used per month
- Recap of local Scholarship receipts and expenditures
- Recap of FREF scholarship receipts and expenditures
- Recap of special projects receipts and expenditures
- Analysis of the current budget with actual income and expenses
- Schedule audit with Audit committee (after July 1 but before September meeting)

5. Work with the Budget committee to prepare budget for the next fiscal year, utilizing previous year's analysis.

- Present budget to the Executive Board no later than the Sept. meeting
- Post approved budget for members' information.

6. If your Unit has a tax-free number: *Unit Tax Responsibilities as a 501(c) 6 Not for Profit organization. To use the Unit's tax-free number, all major purchases must be purchased on a unit check not a personal check. The Florida Tax Exempt Certificate must accompany the unit check.

File an electronic 990-N with the IRS prior to November 15th every year.

Unit Income: The amount of income for the unit is based on an estimate of the number of members who will renew membership. This is the only money to be budgeted for committees' expenses, etc. The other incomes listed below are designated funds.

Designated Unit Expenditures:

Luncheons: The luncheon is self-supporting. Members attending must pay and cover all expenses. Invited guests are free. Members can cover their costs.

Unit Scholarship: The amount of the scholarship given each year is set by the unit. This is raised by donations, drawings, and other designated activities. Scholarship money raised from the public must be used for that purpose.

FREF Certificate of Recognition: The unit must contribute minimum \$2 per member to support FREF. The unit determines the amount based on status of available funds. The unit / members may contribute additional funds in memory of their deceased members.

FREF Disbursements: As long as funds are available this money will be taken from the operating account.

FREA Convention: Each unit is encouraged to give a specific amount to help with expenses. The number of Convention delegates is determined by FREA based on the Units' State membership number in January.

Committee Expenses – Each committee has an annual budget. Bills are submitted to the Treasurer for reimbursement.

Unit Treasurer Frequently Asked Questions

1. **How does our Unit set up non-taxable status with the IRS?** Contact the FREA Office, they have the instructions.

2. **What is the procedure to file for a not-for-profit organization?**

The form is on the IRS.gov website. This is a 990-N post card form . At the IRS site at the top right of page click on “Charities and non-Profits”

Middle of page click “Reporting and filing”

Middle of page click on Annual Electronic Notice (e-postcard)

Lower part of page click on “ready to file” (form 990-N)

For 1st time filers click on “Create Account “ and follow all directions.

There are 2 questions: “Yes, you are still in business, and No, you didn’t make over \$50,000.”

When done it will say “pending”. In 30 minutes, it will change to “accepted”. Print copy for your records .

2. **Where do I get the FREA paid membership list?** Request a Unit Status Report as needed from the FREA Office.
info@frea.org

3. **How do the newly elected officers and treasurer transfer for new signatures on the unit’s accounts?**

Contact your banking institution for details before you go there to change officers and treasurers. You will need:

- copies of your driver’s license,
- a copy of the secretary’s minutes for the meeting in which you were elected,
- the previous Treasurer, and the President to accompany you to the bank.

The banks require documentation of the newly elected officers. It is important to have 2-3 signatures on file to write checks in the event the treasurer is not available to sign a needed check.

4. **What are the steps for processing dues?**

- When dues are received record to your records.
- Verify contact information is still correct, and update the member status and the date of payment, expiration and any changes.
- Print a deposit form and make sure the amount of checks and cash is the same as total on the form.
- Record any scholarship, legislative, or FREF donations
- Annually, in February or on request, FREA provides mailing labels (member name and membership #)
- Pull the label and stick it to an FREA Unit Dues sheet available on the FREA website on the Unit Info page. Send this to FREA with a check when you have several collected.
- Number lists with Membership year and list number.
- If you have a new member, fill in the form as completely as possible including email and phone number.
- Attach the bank’s deposit receipt to your deposit slip and file it in the current year’s Bank Deposit file folder.
- Post the total of the deposit into the journal.

5. **Does the auditor have to be a CPA or accountant?**

No, but it is best to have several members audit unit accounts. Write a summary of the audit. Everyone signs. Keep the record of the audit for 3 years with receipts and deposits, as well as your analysis of yearly expenditures.

6. **What documents/copies are needed for an audit?**

1. All records for the fiscal year (July 1-June 30)
2. Annual report copies for each audit committee member
3. File of bank deposits
4. File of Treasurer’s Reports
5. File of Bank statements
6. File of Membership transmittals
7. File of paid bills/invoices
8. File of treasurer’s memo

Copy of the previous year’s budget and approved current budget

7. **Treasurer’s Reports should be given at every general meeting and Board meetings; a copy should be given to the secretary for their records.**

Membership Chair and Treasurer. Working together or combined position.

Some units combine the Treasurer with the Membership position. If your unit combines both positions, both the Membership and the Treasurer positions’ responsibilities are to be followed.

*In the State of Florida, FREA and all Units are recognized as tax exempt. There is a procedure for a Unit to apply for tax exemption under its Unit name. Please refer to the FREA website on the Unit Forms and Info page, or contact the Office to have the instructions mailed to you.



FREA UNIT SECRETARY

Unit Recording Secretary

Responsibilities

- Attend Executive Board and Unit meetings. Work with Unit President and Executive Board or Committee 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

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

The function of education is to teach one to think intensively and to think critically. Intelligence plus character - that is the goal of true education.

Dr. Martin Luther King, Jr.



FREA STEPS TO START AN FREA UNIT

1. Advertise within a geographical area the intent to recruit members and establish a FREA Unit:

- Email sent to all retired educators and Members at large in the zip code areas from President of FREA, and a Local retired educator living in the area to recruit members, or send a letter; (Note we have a draft of a letter to use.)
- Post flyers for interested retired educators in community centers etc.;
- Establish a phone tree of interested educators and call retirees;
- Use Facebook, or other social media to get the word out; and
- Advertise and host an event and seek interested educators such as a: Lunch and Learn, wine tasting, or activity of interest, e.g. Pickle Ball tournament.
- Designate a day of the month for meetings, and a location.

2. Requirements:

- Establish a unit with at least 10 members,
- Develop a set of Bylaws in compliance with FREA's Bylaws,
- Establish officers of a Unit Board: President, President Elect, Secretary, Treasurer, and other officers per Unit Bylaws. (Copies of the secretary's minutes with the installed Board officers are required to establish a checking account. The FREA office has an example of Bylaws to use.)
- Conduct Unit installation of officers, with the District Director or FREA President installing officers.
- Establish a checking account at the local bank or credit union.
- Set Dues amount for local (\$10-20) and State (\$35).
- There is a \$200 grant from FREA to establish a unit.
- There is a \$70.00 fee payable to FREA to register a unit.
- Hold at least 6 General Unit meetings a year, as well as Board meetings.
- Send Convention delegate to the State Convention.
- Maintain communication with the FREA President, District Director, Trustee, and FREA office.

*It is our attitude at the beginning of a
difficult task which,
more than anything else,
will affect its successful outcome.*

William James



HOW TO PLAN AN FREA LEADERSHIP SYMPOSIUM

Purpose: Leadership Training is important to maintain our goals and objectives for FREA and for continuity. Officer training should be relevant and reflect the responsibilities of the Unit FREA officers. FREA Trustees work with the District Directors to assist with the symposium planning and provide important information for our scholarship programs.

Date, Location, Time, Program

- A. **Date:** The state office establishes the date based on travel schedule for State team. Advertise the symposium dates in August to local units.
- B. **Location:** The District Director (DD) secures a location. (ex. A church meeting hall, or community center. Attempt to find locations charging no, or a nominal fee.)
 - The state office is notified as soon as a location is established. A contract is issued.
 - Provisions for AV, podium, microphones, internet access is necessary for speakers and programs.
- C. **Time and Program:** The state office establishes an example program for training,
 - The time frame is usually 9-2. The example is flexible.
 - The guest speaker is set up by the DD and usually speaks for about 30 mins.
 - Contracts for location and caterers and deposits
 - FREA will require a copy of any contract issued. FREA will provide a contract if a facility/caterer does not provide a contract. The FREA contract clearly designates key issues. Request a copy of the FREA contract prior to planning.
 - Meals include a continental breakfast, coffee and tea, and a lunch. The menu should be stated on the contracts.
 - If a deposit is required for the location or catering, the FREA office will issue a check.
 - The state office will make hotel reservations for the State team.
- D. **Fees for Registration for members:** Collect registration fees in Sept/Oct.
 - Registration fee is determined by adding the costs of the meals, custodial services, location charges, decorations, and incidentals. Divide the total cost by the number of members attending to establish the registration fee. The symposium should break even. The state office will pay for the visiting team. If Benefit Providers attend they pay as well.
 - Those members attending the symposium must pay the registration fee in advance to the local unit. (Establish and inform units of a deadline.) All registrations must be completed by a given dead line, as there are no registrations the day of the Symposiums.
 - If a caregiver, driver, a member's spouse, or guest attend the symposium they must also be registered and pay the registration fee
 - The local unit will submit one unit check, with a list of registered attendees the day of the luncheon to the FREA officer.
 - FREA will issue checks for the caterer, deposits, location fees, and custodial charges, etc.



Florida Retired Educators Foundation, Inc. (FREF)

FREF Mission Statement

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

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.

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 which shall be construed to include, but not limited to, provision of scholarship grants for future teachers, financial assistance to needy retired educators, and practicing educator grants.

How is FREF Organized?

The FREF Board of Trustees consists of 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 to 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 meetings and activities at the annual FREA Convention (Dollars for Scholars, Country Store, etc.).

Responsibilities of UNIT Scholarship Chair

- Stay in contact with the District Trustee.
- Attend Executive Board and Unit meetings. Prepare a report for each meeting.
- Work with Unit President and Executive Board to develop and support unit and state activities.
- 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.

Extravaganza tickets will be mailed to the unit presidents. Unit Reps and Trustees will both be selling Extravaganza tickets. However, Unit tickets and Trustee tickets must be kept separate, & money must be submitted to the Office separately.

Communicate state and local (if applicable) scholarship information to local high school contacts.

- Form a committee to interview and select a nominee for the state and local (if applicable) scholarship program. Fill out the Interview Form for your state nominee and send (email) it to the state office.
- Arrange to present FREF scholarship during high schools' awards program.
- Inform local unit and high schools about Practicing Educator Grants and assistance for retirees in financial crisis.
- Inform local unit of the criteria for receiving a Certificate of Recognition.

Responsibilities of DISTRICT Trustee

- Attend all required state meetings (August, March, & May Convention)
- 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.
- Extravaganza Tickets - It is the expectation that District Trustees will sell ten Extravaganza tickets (separate from the unit tickets). If not sold, the Trustee will buy them. Unit and Trustee tickets & money must be submitted to the Office separately, in order for the Trustee to get credit.
- Attend District meetings and deliver current FREF information to all members from the District.
- Complete requested reports and send to FREF Chair.

August – 3-minute report on District Symposium plans

March – 2-minutes report on district/unit activities

Final Trustee Report – fillable form to be emailed to FREF Chair (May 30 deadline)

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.
- Establish committees and assign committee chairs.
- Stay in constant contact with the Trustees and State FREA Office.
- Attend District workshops when there is no district trustee.

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"To Serve, Not to Be Served"

