

Florida Retired Educators Association

# Handbook

2024-2026



8950 9th Street N, Suite 105

Saint Petersburg, FL 33704

[www.FREA.org](http://www.FREA.org) ~ 727-577-6400 ~ [info@frea.org](mailto:info@frea.org)



# FREA President's Letter

Dear Esteemed FREA Member,

It is with great enthusiasm that I present to you the newly revised FREA Handbook, crafted with your valuable input and our collective experiences in mind. This updated information guide is designed to better support you in your ongoing journey of service, learning, and fellowship. This information has been meticulously updated under the guidance of our President-Elect, Carrie Frye and the dedicated members of the Handbook Committee, ensuring it meets the evolving needs of our association. We are grateful for their pursuit of excellence and dedication to the field of education. My wish is that as you peruse the pages of this handbook, you will observe that it reflects our shared vision for supporting and empowering each FREA member to continue blazing trails as retired educators.



Our goal with this revision was to ensure that the handbook remains a valuable resource, providing you with the tools, information, and connections you need to thrive while continuing to make a positive impact in your unit and communities. Whether you are seeking ways to stay engaged and attain personal growth, connect with fellow members, or access valuable information to increase your membership, this handbook has been designed with your needs in mind.

This handbook extensively covers a range of pertinent topics from the history of FREA to “Ways to Keep your Unit Vital, Strong, and Growing”, to awarding student scholarships, and teacher grants along with Officer and Committee Responsibilities. We are confident that this phenomenal guidebook will be an indispensable resource, providing our esteemed members with all the relevant information required for a successful and extraordinary term of service.

If you are a new or returning member, you will find that this updated and comprehensive handbook has been designed to be user-friendly, providing clear and concise information, enabling ease of access and navigation whether you prefer reading in printed form or on our innovative website at [www.frea.org](http://www.frea.org). It's all for you, enjoy!

I am honored to serve as your President, and I am grateful for the collaborative efforts of each member in bringing this updated handbook to fruition. Together, we are committed to upholding the values and mission of FREA, ensuring that your contributions to education and your communities continue to be recognized and supported. Your experience, wisdom, and passion for education are invaluable assets to our organization and to those we serve from day to day.

Thank you for your unwavering dedication and for being an integral part of FREA. I look forward to what we will achieve together as we continue our journey of “Transforming Vision into Reality”.

With warmest regards,

*Harriett M. Jenkins*

Harriett M. Jenkins  
FREA President



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# FREA/FREF Reports-Actions Calendar

## FREA/FREF Reports-Actions Calendar July 1 to June 30

Date	Report	Responsible	Destination
	<b>VIF—Very Important Form: Report of Contact Info for Unit Officers and Meetings</b> -send to Office after election of officers and when any meeting times, locations, change.	Unit President	FREA Office
<b>August Board Meeting</b>	Unit Contact Progress report	State Committee Chair	FREA President-Elect
	Oral Progress Report	District Directors	Give at meeting
<b>August 31-Sept 30</b>	Scholarship Information to High Schools—Students can apply online—	FREF Trustees/Unit FREF Chairs	All High Schools in District
<b>September - October</b>	<ul style="list-style-type: none"> <li>• 5<sup>th</sup> Grade Essay Information to schools</li> <li>• Practicing Educator Grant info to schools</li> </ul>	District/Unit VS Chair	<ul style="list-style-type: none"> <li>• All grade schools possible (public)</li> <li>• All schools possible (public)</li> </ul>
<b>Last week of November</b>	<ul style="list-style-type: none"> <li>• Office mails Extravaganza Tickets</li> </ul>	FREA Office	Unit President
<b>January 1</b>	<b>Deadline for any Unit Dues Increase</b> is due to the Office to be included in the Membership renewal notice for the upcoming year.	Unit President	FREA Office
<b>January 31</b>	Deadline for Membership for Convention Delegates	Membership Chair/ Unit President	FREA Office
<b>Jan/Feb FREA Board Meeting</b>	Unit Contact Progress report	State Committee Chair	FREA President-Elect
	Potential Leadership Candidates	District Directors	Give at meeting to State Director
<b>February 15</b>	Deadline for Practicing Educator Grant	Participants	FREA Office
	<ul style="list-style-type: none"> <li>• Unit volunteer services reports</li> <li>• Volunteer of Year Nominee</li> <li>• 5<sup>th</sup> Grade Essay Deadline for units</li> </ul>	Unit VS Chair	District VS Chair
<b>March 1</b>	This space left blank		
	Return Convention Delegate Names to Office	Unit President	FREA Office
	FREF Scholarship Submittal Deadline from Units	Unit FREF Chair	FREA Office
	<ul style="list-style-type: none"> <li>• Copy of each units' volunteer report</li> <li>• 1 5<sup>th</sup> Grade Essay selection</li> <li>• 1 VOY selection</li> </ul>	District VS Chair	State VS Chair
<b>March 31</b>	FREF Certificate of Recognition - Criteria on website	Unit President	FREA Office
<b>April 1</b>	<ul style="list-style-type: none"> <li>• Liability Insurance Payment Due to FREA Office</li> </ul>	Unit President/Treasurer	FREA Office
<b>April 15</b>	<ul style="list-style-type: none"> <li>• District Directors Annual Report</li> <li>• State Committee Chair Annual Report</li> </ul>	District Directors State Committee Chairs	FREA Office
<b>April 30</b>	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
<b>June 10</b>	FREA and FREF Expense Reports due.	All Board and Trustees	FREA Office
	<b>VS = Volunteer Services</b>	<b>Calendar update: August 27, 2024</b>	



# FREA Handbook Committee

## **FREA President**

Harriett Jenkins

## **FREA Handbook Committee Chair**

2024-2026 Revision

Carrie Frye

FREA President-Elect

## **Committee Members**

Karla Brogdon

Susan Darovec

Linda Edson

Dr. George Ellis

Anne Fagan

Donna Harper

Dr. Phyllis Omilak

Jody Scruggs

Cecelia Solomon

Linda Stephens

Pat Watkins

Margaret Williams

**Alone we can do so little;  
Together we can do so much.**

*Helen Keller*



# 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 5<sup>th</sup> 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 9<sup>th</sup> 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	Mrs. Anne U. Bullock	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	Mr. Larry L. Carmichael	2000-02
<i>Mr. M. O. Worthington</i>	1967-69	Mrs. Mildred S. Dunlap	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	Ms. Marie E. Grein	2008-10
<i>Mrs. Clara Louise Smith</i>	1974-76	Mrs. Esther Twitchell	2010-12
<i>Miss Wilma Simmons</i>	1976-78	Mrs. Thelma Mosley	2012-14
<i>Dr. William A. Gager</i>	1978-80	Mrs. Catherine McCartney	2014-16
<i>Mrs. Betty F. Zentgraf</i>	1980-82	Mr. Roger Cuevas	2016-18
<i>Mrs. Ruby G. Buck</i>	1982-84	Mrs. Pam Schwartz	2018-20
<i>Mrs. Lucile M. Doyle</i>	1984-86	Mrs. Nancy Hosie	2020-22
<i>Italics denote deceased</i>		Mrs. Edwinna Williams	2022-24

**Service is the rent that you pay for room on this earth.**

Shirley Chisholm





# FREA

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# FREA Purpose and State Office



## What is FREA (Florida Retired Educators 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.

	<p style="text-align: center;"><b>The FREA Office</b>  <b>8950 9th St. N. Suite 105</b>  <b>Saint Petersburg, FL 33704</b>  <b>727-577-6400 <a href="mailto:info@frea.org">info@frea.org</a></b>  <b><a href="http://www.frea.org">www.frea.org</a></b>  <b>We are on Facebook, LinkedIn and X</b></p>	
<p style="text-align: center;"><b>FREA Office hours are 8AM to 4PM Monday—Friday.</b>  <b>FREA has two full time employees who maintain the continuation of knowledge and service in the organization.</b></p>	<p style="text-align: center;"><b>Anne M. Fagan</b>  <b>Executive Director</b></p>	<p style="text-align: center;"><b>Diane Lynch</b>  <b>Membership Accounting Specialist</b></p>

## 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 FREA 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.

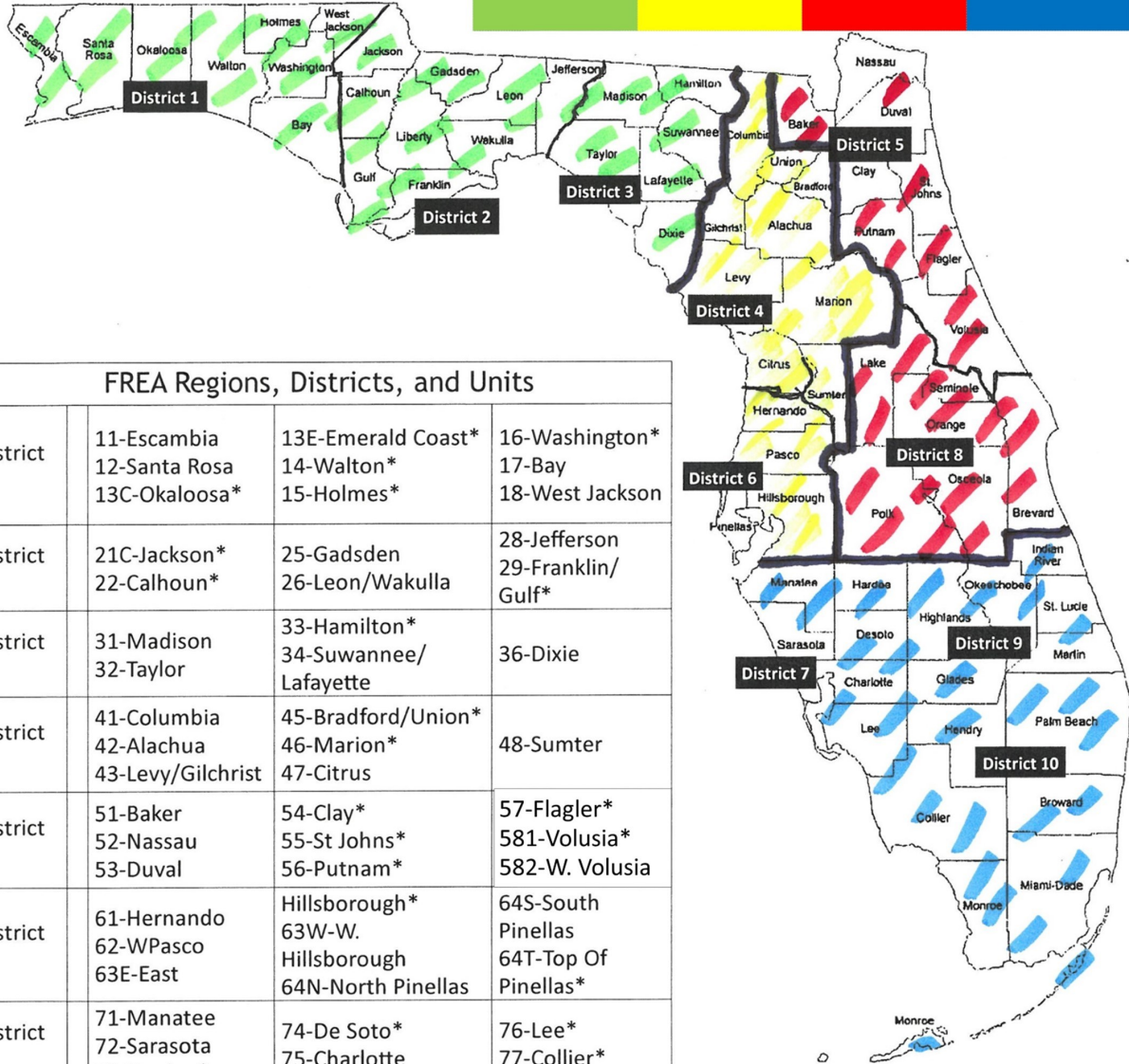
**FREA Regions/Districts** - FREA is divided into 4 Regions and 10 Districts determined geographically. These geographic units take into consideration major metropolitan areas, urban areas and rural counties. Each District elects a District Director who is a voting member of the Board of Directors. Each District Director provides a point of contact between the FREA 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 that believe in in the FREA Mission.



# FREA Map with Regions, Districts, and Units

Northern Region Districts 1,2,3	Western Region Districts 4,6	Eastern Region Districts 5,8	Southern Region Districts 7,9,10



FREA Regions, Districts, and Units			
District 1	11-Escambia 12-Santa Rosa 13C-Okaloosa*	13E-Emerald Coast* 14-Walton* 15-Holmes*	16-Washington* 17-Bay 18-West Jackson
District 2	21C-Jackson* 22-Calhoun*	25-Gadsden 26-Leon/Wakulla	28-Jefferson 29-Franklin/ Gulf*
District 3	31-Madison 32-Taylor	33-Hamilton* 34-Suwannee/ Lafayette	36-Dixie
District 4	41-Columbia 42-Alachua 43-Levy/Gilchrist	45-Bradford/Union* 46-Marion* 47-Citrus	48-Sumter
District 5	51-Baker 52-Nassau 53-Duval	54-Clay* 55-St Johns* 56-Putnam*	57-Flagler* 581-Volusia* 582-W. Volusia
District 6	61-Hernando 62-WPasco 63E-East	Hillsborough* 63W-W. Hillsborough 64N-North Pinellas	64S-South Pinellas 64T-Top Of Pinellas*
District 7	71-Manatee 72-Sarasota 73 Hardee*	74-De Soto* 75-Charlotte	76-Lee* 77-Collier*
District 8	81-Lake 82-Seminole 83-Orange 84-Osceola	851-Polk 1 852-Polk 2 86N-North Brevard	86C-Central Brevard 86S-South Brevard*
District 9	91-Indian River 92-Highlands	93-Okeechobee 94-St. Lucie	95-Martin
District 10	01-Glades/ Hendry*	03-Palm Beach 04-Broward	05-Dade 06-Monroe*
* No Active Unit at this time			



# FREA Mission and Strategies

## 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 5<sup>th</sup> 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
- \* Have icebreakers
- \* Have interesting group activities
- \* Have FUN!

**Memories of our lives, of our works and our deeds  
will continue in others.**

Rosa Parks



# FREA Organization

## FREA Executive Committee

President  
President-Elect  
State Director  
Treasurer  
Secretary  
District Director Representative 1-5  
District Director Representative 6-10

## FREA Board of Directors

President  
President-Elect  
State Director  
Treasurer  
Secretary  
District Directors 1-10

## State Committees

Bylaws  
Information Services  
Legislative

Membership  
Nominations  
Volunteer Services

### Ad Hoc Committees

Convention  
Chorale  
Medical  
Necrology  
Policies/Procedures

Recruitment  
Safety and Security  
Social  
Technology

## Florida Retired Educators Foundation

FREF Chair  
FREF Treasurer  
FREF Trustees  
FREF Unit Chairs

*If we do not lay out ourselves in the service of mankind,  
whom should serve?*

*Abigail Adams*



# FREA Executive Committee

## EXECUTIVE COMMITTEE.

### Section 8.01 Members.

The Executive Committee shall be composed of the President, the President-Elect, the Secretary, the Treasurer, the State Director, and two (2) representatives from the District Directors, one (1) elected from each of the two (2) groups provided in Article IX, Section 9.03. These representatives shall be elected annually by members of their group. State Committee Chairs invited by the President to attend an Executive Committee meeting shall have all the rights and privileges of Executive Committee members except the right to vote.

#### **President**

- Serve as the chief executive officer of the Association.
- Serve as the official spokesman for the Association.
- Preside at meetings of the Delegate Convention, the Board of Directors, and the Executive Committee.
- Make such appointments as authorized by the FREA Bylaws and the Standing Rules.
- Serve as an ex-officio member of the FREF Board of Trustees.
- Exercise such other powers as are authorized by the adopted parliamentary authority.
- Serve as ex-officio member of all committees except the Nominations Committee.

#### **President-Elect**

- Be responsible for the supervision of the State Committee Chairs and their training at the Delegate Convention.
- Serve as Benefits Committee Chair.
- Be responsible for Awards.
- Be responsible for getting the President's plaque/gift.
- Represent the President in visiting units and in attending functions at the request of the President.
- Serve as a member of the Budget Committee.
- Perform such other duties as are assigned by the President or Executive Committee.

#### **Secretary**

- Act as recording secretary of the Association.
- Record minutes of all meetings of the Delegate Convention, the Board of Directors, the Executive Committee and the Benefits committee as per current Roberts Rules of Order.
- Be responsible for distributing copies of minutes in a timely manner.
- Provide copies of all minutes with the FREA state office. Minutes will be indexed and filed by the FREA state office.
- Perform such other duties as are assigned by the President or the Executive Committee.

#### **Treasurer**

- Provide a financial report at the Delegate Convention, at each regular meeting of the Board of Directors
- Present books for an annual audit.
- Serve as Chair of the Budget Committee.
- Serve as Chair of the Ad Hoc Investment Committee.
- Perform such other duties as are assigned by the President or Executive Committee.
- Assist in the supervision of the Membership and Accounting Specialist.

#### **Past President**

- Serves as Chair of the Nominations Committee
- Serves as a consultant to the current President

#### **FREA State Director**

- Work with District Directors.
- Be responsible for any training programs as directed by the Executive Committee.
- Coordinate with the District Directors the planning of the Symposiums.
- Be responsible for making a summary of the District Directors' semi-annual reports and furnish copies to the members of the Executive Committee.
- Perform such other duties as are assigned by the President or Executive Committee.

#### **Executive Committee District Director Representative for Districts 1-5 —Ex-Officio**

#### **Executive Committee District Director Representative For Districts 6-10—Ex-Officio**





# FREA Standing Committees

## 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.

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*Ideas are a dime a dozen.  
People who implement them are priceless.*

Mary Kay Ash





# FREA Standing and Special Committee Purposes

FREA has multiple committees that carry on the work of the FREA, 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 supply information contributing to members' 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 serves 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 Nominations 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

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

## Duties 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 15.
- 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.

## Duties 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/Board 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.

## Duties 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 1.
- 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 15.
- Participate as requested at FREA Convention.
- Submit Information Services column for *FREA Bulletin* (July 1, November 1, March 1)
- Act as a District Information Services Chair in absence of one (if Committee has District Chairs).
- Assist other State Committees as requested
- Maintain active participation with local unit.
- Perform other duties as stated in FREA Standing Rules.

## Duties 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 Symposium
- Complete requested reports and turn in to State Chair.
- Maintain active participation with local unit.

## Duties 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 shareable information
- Access AMBA 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

The Legislative Committee of Florida Retired Educators Association works to inform lawmakers of the needs of its membership to have economically secure and healthy lives. Committee members communicate in an ongoing manner with FREA members, keeping them up to date 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.

## Duties of STATE Legislative Chair

- Report to the President-Elect.
- Use the [FREA.org](http://FREA.org) website to encourage and train FREA members to understand and use the legislative priorities, advocacy strategies and resources.
- Select District Legislative Chairs (two year term) and notify FREA by August 1.
- 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 15.
- Participate as requested at FREA Convention.
- Maintain active participation with local unit.
- Perform other duties as stated in FREA Standing Rules.

## Duties of DISTRICT Legislative Chairs:

- Use the [FREA.org](http://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 Symposium
- Participate in annual trip to Tallahassee
- Maintain active participation with local unit.

## Duties of UNIT Legislative Chairs

- Use the [FREA.org](http://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 especially during election years.
- 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

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.

## Duties of STATE Membership Chair

- Report directly to President Elect.
- Select District Membership Chairs (two-year term) and notify FREA by August 1. (State Chair option)
- Maintain an accurate contact list of Membership Chairs and notify FREA as changes occur.
- Provide ongoing support, guidance, and information for Unit/District Membership Chairs to share with units.
- 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 15.
- Participate as requested at FREA Convention.
- Maintain active participation with local unit.
- Submit Membership column for *FREA Bulletin* (July 1, November 1, March 1)
- 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.

## Duties 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.

## Duties of UNIT Membership Chair

- Encourage State Only members, e.g. those recruited by AMBA, to join local unit.
- Ensure New Member Registration forms and payment are sent into FREA in a timely manner. Retain a copy.
- FREA mails first dues notice in May. Encourage members to renew their annual membership early. Early renewal saves FREA time, postage, and printing.
- Report any deceased members to FREA directly (No form needed). [info@frea.org](mailto: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.
- Contact new retirees in the unit's area and explain FREA's goals and mission
- Obtain district retiree list and Member-at-Large lists from the FREA Office. New lists are available annually, in September.



# FREA Nominations Committee

The Nominations 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 procedures below:

## **Section 9.01 Nominations**

*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 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 Nominations 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 for the Convention floor provided prior consent of the nominee has been obtained.*

To ensure statewide representation each District Director should recommend at least one candidate in their respective district. This person shall give their consent for the recommendation. Recommendations should include a candidate's resume with skills identified as necessary for the office.

## **Elections**

The office of President shall be filled by the President Elect at the end of the two-year term or in case of an unexpected vacancy. Elections of officers is in accordance with the FREA Bylaws procedures below:

## **Section 6.01 Officers**

The officers of the Association shall be President, President-Elect, Secretary, Treasurer, State Director, and the District Directors. The Secretary, Treasurer, and the State Director shall be appointed by the President subject to the approval of the Board of Directors. Appointed officers shall serve for one term (two years) coinciding with the president's term of office.

## **Section 9.02 Elections**

*The election of Officers shall be held at the Delegate Convention. A majority of the votes cast shall be necessary for the election of any officer. In cases where there is but one nominee for an office, a voice vote may be taken. If there are two or more nominees for that office, the vote shall be by ballot.*

## **Installation of Officers**

Installation of all officers for FREA and FREF shall take place during the Delegate Convention (either in-person or virtually). The Chair of the Past Presidents Council shall conduct the installation ceremony. In the event the Chair is not available another Past President will conduct the installation.

**Retirement isn't about stepping back for a teacher; it's about stepping up to a new level of influence and impact that leaves an indelible mark on the world.**

Unknown





# 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. Local Units are encouraged to participate in FREA statewide projects like The Margaret Poppell Literacy for Life Project. Units are also encouraged to create service projects that allow 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 Mission of FREA.**

## Duties of STATE Volunteer Services Chair

- Report directly to President-Elect.
- Select District Volunteer Services Chairs (two year term), and notify FREA Office of any changes by August 1, or as soon as changes occur.
- Maintain an accurate contact list of District Volunteer Services Chairs.
- Provide ongoing support, guidance, and information for District Volunteer Services Chairs to share with local units.
- Attend FREA Board of Directors meetings by invitation of FREA President.
- Present reports for August and January Board of Directors Meetings.
- Send an Annual Report to FREA President-Elect and FREA Office—due April 15.
- 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.

## Duties 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 Symposium.
- Review annual data reported by local units and send to the State Volunteer Services Chair by March 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. Report this to State Volunteer Services Chair by March 1.
- If you have participating units, select one winner from entries submitted for the 5<sup>th</sup> Grade Essay Contest and report to State Chair by April 1. Ensure that the winner's form is complete, with photo attached.
- Turn in all completed Volunteer Services reports to the State Chair by April 1.
- Participate in TBA (To Be Announced) conference calls/virtual sessions if arranged by the State Chair.
- Email contact information to the State Chair by November 1 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.

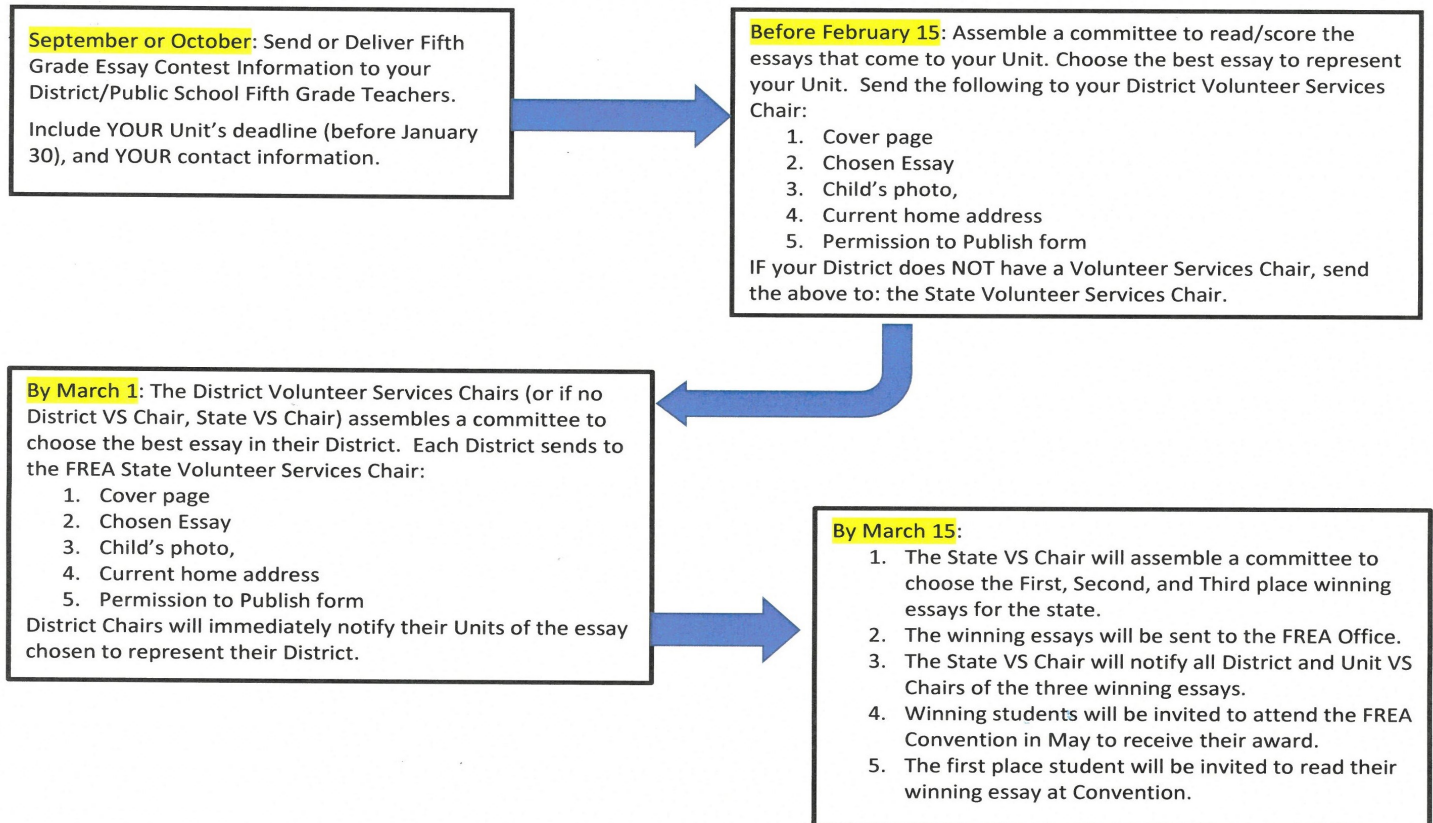


# FREA Volunteer Services Committee

## Duties 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.
- 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 February 15.
- Encourage your local Unit to show appreciation and recognition to your Volunteer of the Year and encourage attendance at the annual FREA Convention.
- Encourage 5<sup>th</sup> Grade public school students, Teachers, and Administrators to participate in the 5<sup>th</sup> Grade Essay Contest.
- If you have an entry, complete the 5<sup>th</sup> Grade Essay Contest Cover Page in its entirety with an attached student photo and updated home address.
- Attend Zoom meetings when arranged by the State Volunteer Services Chair.
- Email personal contact information to FREA and the State and District Volunteer Services Chairs by November 1 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 (M@L).

**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](http://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 M@L.

**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](http://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 February 15** 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](http://www.frea.org) website?** Yes, all online VS forms and information are current.

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

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

**What is the 5<sup>th</sup> Grade Essay topic?** Students must describe an experience or experiences with a grandparent or older adult who has influenced their life in a positive way.

**What prizes are awarded to the 5<sup>th</sup> 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 **March 1**.

**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 March 1.



## **DISTRICT DIRECTOR AND UNIT OFFICERS**

**Unit Committee Chair Duties are listed in the  
Standing Committees Sections.**

FREA recognizes that Units, members, and communities have unique strengths and talents. Some Unit Officer suggestions and responsibilities are listed for consideration; however, officers are encouraged to “think-out-of-the-box” and assign duties appropriately.





# FREA 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**

- 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/Region.
- 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.

*Life is a gift and it offers us the privilege, opportunity and responsibility to give something back by becoming more.*

Tony Robbins



# FREA UNIT PRESIDENT

## Unit President

### Duties to the 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
- Use virtual communication and 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.

### Duties to 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.

*One man can make a difference and every man should try.*

*Jacqueline Kennedy*





# Unit President-Elect/Vice President

## Unit President-Elect/Vice President

### **Duties to the Unit and the State**

- 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

We must not cease for exploration.  
And the end of all our exploring will be to arrive  
where we began and to know the place for the first time.

T. S. Eliot



# FREA Unit Treasurer

**Unit Treasurer Duties-** 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.

**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.

**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.

**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)

**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 September meeting
- Post approved budget for members' information.

**If your Unit has a tax-free number: \*Unit Tax Responsibilities as a 501(c)4 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 15<sup>th</sup> 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**
- **How does our Unit set up non-taxable status with the IRS?** Contact the FREA Office, they have the instructions.



# FREA Unit Treasurer Continued

## 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 1<sup>st</sup> 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 .

**Where do I get the FREA paid membership list?** Request a Unit Status Report as needed from the FREA Office. [info@frea.org](mailto:info@frea.org)

## 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.

## 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.

## 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.

## What documents/copies are needed for an audit?

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

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

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

## **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 Treasurer FAQ's

## FREA Membership Dues Frequently Asked Questions

This Information is for Both Unit Treasurers and Unit Membership Chairs and replaces previous FREA information on how to process FREA State Membership Dues.

**Q. When should Units send State Dues to the FREA Office?**

A. When they are collected. An explanation is given below, as to how to do that.

**Q. When does the Office mail out renewal notices for the upcoming membership year?**

A. May 1st. The Office asks that Units' get as many of their members' dues (for the upcoming fiscal year), before the first Dues Reminder Mailing on the 1<sup>st</sup> of May. This saves postage costs. The first mailing is done by email, if the member has one, and snail mail, if they do not. The 2<sup>nd</sup> dues notice goes out the first week of September and all of those are snail-mailed.

**Q. When are New Members eligible for FREA Benefits?**

A. The day FREA processes the FREA State dues, a member number is assigned, and the member is entered into the database. This is why State dues should never be held by Units. A letter is automatically generated when a new member is activated. If the member has email, it is emailed, if not, it is snail-mailed.

- Their membership year stays on the FREA/Unit fiscal year.

### Explanations/Processes for Units collecting and sending FREA Dues to FREA Office:

**Units may collect dues year-round.** For both their Unit, and FREA. FREA State dues should be sent to the Office year-round. The first membership year, members may end up with more, or fewer, than 12 months.

- 1. New Members and Renewal:** When the dues are collected, the Unit marks the Membership Dues Form, or individual, with the membership year to be credited. The FREA dues will be credited to the indicated FREA fiscal membership year.  
**If the Membership Year is not indicated:** Before January 1, the dues sent in will be credited to the previous membership year. After January 1, the dues sent in will be credited to the following membership year.
- 2. AMBA members (Members at Large-M@L) joining the Unit after joining FREA: The below refers to those members, only.**
  - Units can collect the first year's Unit dues from them when they join. Then...
  - They will receive their invoice automatically the month of their annual join anniversary date.
  - Once they have joined the Unit, their following year's invoice will also have the Unit Dues on it.
  - They are invoiced by the Office on their join date with FREA.
  - Do NOT collect their State/Unit Renewal dues. It will end with them being double billed.
  - This means that Units will have dues coming in year-round.
  - The AMBA/Unit Members will be the same as regular, just with a different dues calendar, and the Unit does not collect their dues. The Office will send the dues to the Unit after processing renewal.
  - The Treasurer can make a note of their AMBA first membership and their dues date by the member's name.
  - That will alleviate trying to collect the dues and possibly having the member double-pay.
  - They may have fewer than 12, or more than 12, months the first year, but it will even out the following year.





# FREA Unit Secretary

## Unit Recording Secretary

### Duties

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

## Unit Corresponding Secretary/Sunshine Chair

### Duties

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



**Minutes are not a detailed report on your board or committee meeting.  
Here's what to put in and what to leave out.**

With many things in life and business, less is more. In the association world, this is especially true for meeting minutes.

Minutes are an official record of actions the board or committee took at a meeting, not a record of everything that was said. They serve a historical purpose, but just as important, they serve a legal purpose, documenting the group's adherence to the proper procedures and the association's bylaws. And minutes and recordings made during a meeting are discoverable in litigation, so it is imperative to be prudent about what you include.

### What's In

The minutes should include the title of the group that is meeting; the date, time, and venue; the names of those in attendance (including staff) and the person recording the minutes; and the agenda. The minutes should follow the order of the agenda, with a basic, almost vague, summary sentence or two for each item, along with the name of the person who presented it.

Votes taken should appear in their place of order in the agenda. Generally, don't include names. Instead, record what happened: "Action: Motion made, seconded, and carried." There is one exception: When the board approves executive compensation or a transaction with a board member, that action should be recorded—along with the names of those who voted for and against, the information provided on which they based their decision, and the outcome. This additional detail can help establish a rebuttable presumption that the action was reasonable and can help avoid IRS sanctions.

### What's Out

Since minutes are public documents that members may ask to review, be clear on what to exclude. Avoid direct quotations; even without a name, the speaker may be identifiable. Don't report details of discussions, especially who said what. When items not on the agenda are discussed, note simply that "time was provided for members to discuss items not on the agenda." And remember that minutes are not the place for future action items or to-do lists.

Finally, once the minutes are approved, destroy any notes and audio or video recordings of the meeting. The final approved minutes should be the only record of the meeting that you distribute and keep.





## The 4 C's

# 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.

- Plan ahead with membership input, for 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.
- Survey members regularly to ascertain their preferences are for activities. Share results to create discussion.
- Keep all members informed of meetings and events.
- 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,



# The 4 C's Continued

- 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, GroupMe, Instagram, and other social media.
- 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.
- Run a 50/50 event.



# FREA Awards

## Unit Awards

### **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**

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

### **Annual New Member Contest**

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.

### **Volunteer Services Participation**

A Unit will receive an award if up to 40% or more of its members report actual volunteer hours. The highest 6 units will receive an award.

## Individual Awards

### **Volunteer Services Award**

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

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



# How to Start a New FREA Unit

## 1. Requirements for an FREA Unit Charter

- Establish a unit with at least 10 members,
- Hold at least 6 General Unit meetings a year, as well as Board meetings.
- Develop a set of Bylaws in compliance with FREA's Bylaws—The FREA Office may have a set of old unit Bylaws if there was previously a unit in that county.
- Send Convention delegate to the State Convention.
- Maintain communication with the FREA President, District Director, Trustee, and FREA office.
- 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 (\$45).
- There is a \$200 grant from FREA to establish a unit.
- There is a \$70.00 fee payable to FREA to register a unit.

## 2. How to Build a Unit

- 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: The FREA Office has a draft of a letter for use.)
- Post flyers for interested retired educators in community centers and other places.
- Establish a phone tree of interested educators and call retirees.
- Use Facebook, or other social media to get the word out.
- Advertise and host an event and seek interested educators such as a: Lunch and Learn, wine tasting, or activity of interest, e.g. Pickleball tournament.
- Designate a location and a day of the month for the meetings.

And suddenly you know: It's time to start something new  
and trust the magic of beginnings.

Meister Eckhart



# FREA SYMPOSIUM

**Purpose:** Leadership Training is important to maintain continuity and attain the goals and objectives for FREA. 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 information for our scholarships and grants.

**Date:**

- The FREA Office establishes the date based on travel schedule for State team.

**Location:**

- The District Directors of the region select a geographical location central to their Districts.
- The District Directors select an Area Host
- Suggestions for the venue are sent to the FREA Office. (Attempt to find locations charging no, or a nominal, fee.)
- The FREA Office works with the Area Host and the venue to set and secure a contract that includes necessary AV equipment.

**Time and Program:**

- The FREA Office provides an example program for the Symposium.
- The Symposium time frame is 9:00 AM to 2:00 PM.
- A guest speaker or entertainment can be secured by the region for a duration of about 20 minutes.
- Advertise the Symposium dates in August to local units.

**Contracts for location and caterers and deposits**

- FREA requires and signs the contracts for venues, catering, and speakers,
- FREA will provide a stock contract if a facility/caterer does not provide a contract.
- A continental breakfast and a lunch with beverages are to be provided.
- The menu should be stated on the caterer's contract.
- If a deposit is required for the venue or catering, the FREA Office will issue a check.
- The FREA Office will make hotel reservations for the State team.

**Registration fees for members, guests, and caregivers:**

- Registration fees are collected by Units according to the region's deadline.
- The registration fee is determined by adding the costs of the venue, meals, custodial services, AV, speakers, decorations, and incidentals. Divide the total cost by the number of members attending to establish the registration fee.
- The symposium shall break even.
- The FREA Office will pay registration fees for the visiting team and Benefit Providers.
- 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 deadline as there are no registrations the day of the Symposiums.
- 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 venue, caterer and other expenses covered by region.





# Florida Retired Educators Foundation (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.).

**Individual commitment to a group effort ... that is what makes a team work, a company work, a society work, a civilization work.**

Vince Lombardi



# FREF Organization and Duties

## Duties 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 are mailed to the unit presidents. Unit Representatives and Trustees both sell 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 and Educators in Crisis Grants.
- Inform local unit of the criteria for receiving a Certificate of Recognition.

## Duties 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 such as: scholarships (process and deadlines), practicing educator grants, financial assistance for retirees in financial crisis, process for receiving a unit award.
- 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 and 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 – three-minute report on Symposium plans
  - ⇒ March – two-minute report on District/Unit activities
  - ⇒ Final Trustee Report – fillable form to be emailed to FREF Chair (May 30 deadline)

## Duties 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 Symposium when there is no district trustee.



# Notes

It is not the magnitude of our actions, but the amount of love  
that is put into them that matters

Mother Teresa

# “To Serve, Not to Be Served”

