
INSERT NAME & DISTRICT OF LOCAL UNIT MAKING APPLICATION

*OF THE
ALABAMA EDUCATION RETIREES ASSOCIATION, INC.*

2017 CRITERIA FOR UNIT OF EXCELLENCE AWARD

LOCAL UNIT MEETING CRITERIA

	YES	NO
1. Did the local unit conduct at least six unit meetings at which business was conducted?	<input type="checkbox"/>	<input type="checkbox"/>
2. Was a master schedule of all unit meetings distributed to the members annually reflecting (1) date (2) time and location, and (3) whenever possible, the subject of the programs?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did the executive committee or unit leaders review plans before each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
4. Were committee chairs notified in advance to prepare and present a report at each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
5. Did the committees present a report at each unit meeting? ▪Membership ▪Legislative ▪Community Service	<input type="checkbox"/>	<input type="checkbox"/>
6. Are members notified in advance of each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
7. Was a special welcome provided for new members at each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
8. Was each meeting conducted according to a written agenda?	<input type="checkbox"/>	<input type="checkbox"/>
9. Was a summary of the minutes of the last meeting presented at each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
10. Was a financial report presented at each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
11. Were pertinent communications from the state office presented and/or acted upon at each meeting?	<input type="checkbox"/>	<input type="checkbox"/>

- | | | YES | NO |
|---|--------------------------|---------------------------------|--------------------------|
| 12. Were local legislators invited? | | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Did the unit schedule three programs from the recommended list? | | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal Finance | <input type="checkbox"/> | Community Service Opportunities | <input type="checkbox"/> |
| Legislative | <input type="checkbox"/> | Consumer Protection | <input type="checkbox"/> |
| Health Education | <input type="checkbox"/> | Crime Protection | <input type="checkbox"/> |
| Insurance Protection | <input type="checkbox"/> | State Office Representative | <input type="checkbox"/> |

ADMINISTRATIVE CRITERIA

- | | | |
|--|--------------------------|--------------------------|
| 1. Does the unit elect officers for two year terms in even years and do they take office no later than May 15? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Are all officers and committee chairs current AERA members? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Were the duties and responsibilities explained to the officers and committee chairs? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Did the unit provide the state office with the name of the president by the deadline set by the state office? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Was a copy of the unit's meeting schedule including dates and time mailed to the district director? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Does the local unit have a set of adopted Constitution and By-laws? | <input type="checkbox"/> | <input type="checkbox"/> |

MEMBERSHIP CRITERIA

- | | | |
|--|--------------------------|--------------------------|
| 1. In the unit's membership area, are all retirees drawing a benefit from the TRS offered local membership? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Did the membership committee, on a regular basis, emphasize the importance of local membership and AERA membership? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Was an organized local membership drive conducted that included a membership goal for the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Did the local membership show an increase over the previous year? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Did the membership committee utilize the membership computer printout provided by the state office? | <input type="checkbox"/> | <input type="checkbox"/> |

YES NO

6. Did the unit utilize the free local unit membership letter service by the state office?
7. Did the unit prepare and distribute a membership directory?

PROGRAM CRITERIA

1. Did the unit conduct an organized Community Service Program and submit a report to the state office?
2. Did the unit president announce vacancies on state committees and inquire about member interest in serving?
3. Did the unit secure members as delegates to attend the AERA Delegate Assembly at the Annual Meeting?
4. Did the local unit celebrate Alabama Retired Teachers' Day?
5. Did the unit send appropriate representation to the Leadership Workshop (even numbered years only)?
6. Did the unit send appropriate representation to the Annual District Meeting?

We, hereby certify that _____, the local unit of the Alabama Education Retirees Association has met the standards set for the Unit of Excellence Award.

Signed by: _____, President on _____, 2018

Executive Board Members: _____ date: _____

Deadline February 16, 2018

Criteria for Unit of Excellence Award

Glossary of Terms

Business Meeting

A meeting at which business is conducted. A social gathering of members does not constitute a business meeting.

Meeting Notification

Communication by phone or mail is acceptable.

Membership Drive

A yearly-organized effort by a committee of local unit members whose mission is to inform all retirees in their membership area who are receiving TRS benefits of the opportunity to join the local unit.

New Members Welcome

Formally recognize new members during the business meeting.

Qualified Candidates for AEA Delegate Assembly

To qualify as an AEA delegate, a retiree must be a member of a local unit, AERA and AEA.

Qualified Candidates for AERA Delegate

To qualify as an AERA delegate, a retiree must be a member of a local unit and AERA.

Qualified Candidates for AERA State Office

To qualify to run for state office, a retiree must be a member of the local and state organizations and meet the requirements set for each office.

Qualified Candidates for State Committees

To qualify to serve on a state committee, a retiree must be a member of the local and state organizations.

Report by Committee Chairs

Committee chairs may offer a report or inform the president that there is no report to be made. Both responses meet the guidelines.

ALABAMA EDUCATION RETIREES ASSOCIATION, INC.

STATE OFFICE - LOCAL UNIT RELATIONSHIP

The Alabama Education Retirees Association, Inc. is a unique organization in that the AERA Constitution and Bylaws state in Article IV Organization, section 1 local units are basic units, autonomous and operate independently. Interpreted literally, this could be taken to mean that local units are free to conduct their business without regard to the state office or Board of Directors. It must be recognized that the local units are creatures of and have their existence out of the organization of the state association. Consequently, the concept of autonomy and independence absolutely cannot be taken literally to the exclusion of organizational principles. The goal of this organizational effort is to balance the organizational needs of the state with the appropriate level of autonomy for local units to function efficiently.

An association is an organization of people with a common purpose. Therefore, an organization such as AERA cannot achieve its common purpose to benefit its people (members) if its component parts (local units) go any direction they please.

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. In an effort to provide a degree of uniformity and direction toward the association goals for all AERA units, the AERA Board recommends the following organizational framework:

State Office - The state office is the administrative headquarters of the association. It is staffed by an Executive Secretary, acting as the chief officer of the association, and appropriate staff. The state office is responsible for the day-to-day activities of the association and the implementation of policies and programs as approved by the Board of Directors.

Local Units - The AERA recognizes 81 local units with at least one in each of the state's 67 counties. The local units are the Board approved organizational components of the AERA. They are responsible for the cooperation and execution of requirements of the state constitution and bylaws as well as the organizational and program recommendations of the Board of Directors.

In addition to the relationship with the state, local units play a broader role in serving the needs and interests of education retirees. The comprehensive nature of their role is reflected in the following purposes:

- To serve as the organizational framework for the Alabama Education Retirees Association, Inc.
- To provide a local membership opportunity for all education retirees and to encourage membership in AERA.
- To conduct unit programs that are relevant to the interests of members and enhances attendance.

- To provide opportunities and to encourage participation in the programs and activities of AERA.
- To serve as the backbone of efforts to protect both the TRS and PEEHIP, and to secure regular cost of living raises.
- To provide opportunities for education retirees to continue a life of service to their fellow retirees, their active colleagues, and their communities.
- To keep members informed on important consumer issues affecting personal safety, health and general welfare of retirees.
- To provide opportunities for fellowship and the nurturing of personal and professional relationships.

LOCAL UNIT RESPONSIBILITIES FOR STATE PROGRAMS

Specifically local units are urged to comply with and support the following purposes:

1. Elect unit officers for a two-year term in even years, beginning in 1998. **It is recommended that the president serve no more than two two-year terms consecutively to allow other members an opportunity to serve in a leadership capacity.**
2. Local units will provide updated information on unit officers and local committee chairs to the state office prior to the Leadership Workshop.
3. Annually submit qualified recommendations for state committee vacancies.
4. Nominate qualified candidates for election to AEA Delegate Assembly.
5. Nominate qualified candidate for AERA state offices.
6. Select qualified delegates to AERA Delegate Assembly.
7. Complete and submit annual legislative survey provided by the state office.
8. Select members for lobbying network and cooperate with its implementation.
9. Participate in Retired Teachers' Day activities, as recommended by the state office.
10. Participate in the state's community service program by submitting the cumulative unit hours to the state office.
11. Send appropriate representation to all required meetings and workshops conducted by the state office.
12. Conduct the minimum number of **six** organized unit meetings where business is conducted. In an effort to support AERA's programs, the local unit meetings should be scheduled throughout the year to coincide with the approved AERA programs.

13. Provide and encourage full membership opportunities for every local education retiree drawing a benefit from the TRS.
14. Support the state AERA membership program by encouraging all local members to join AERA. (Go on payroll deduction – AERA/AEA membership)

LOCAL UNIT RESPONSIBILITIES

In cooperating with the state office, the local units are responsible for creating guidelines in the following areas:

1. Conduct election of unit officers.
2. Establish dues structure and the unit's fiscal operations.
3. Offer activities deemed appropriate for the local membership, in addition to the state programs.
4. Establish dates and locations for unit meetings and submit schedule to state office.
5. Determine unit membership eligibility to include all retirees who receive TRS benefits.
6. Establish local unit committees.
7. Establish a process to identify and encourage members to serve in leadership roles at the local and state level.
8. Plan and conduct programs to be presented at the local unit meetings.

Revised 2007