



Forming NYSUT Retiree Chapters



An Online Guide

The  **Retiree**

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Introduction

In 1976 New York State United Teachers (NYSUT) Board of Directors adopted a resolution to encourage locals to organize retirees. A resolution approved at the 1978 NYSUT Representative Assembly (RA) stated that “...NYSUT foster the formation of retirement committees and/or chapters in each local throughout the state.”

In 1991 NYSUT formed a Retiree Advisory Committee (RAC). It was an attempt to reach out to retirees, to encourage them to stay involved in NYSUT and to provide improved representation and services to retired members.

One of the goals of the RAC has been to assist retiree councils on retiree matters and offer guidance to locals in forming retiree chapters in order to more effectively maintain a retiree/local link, as their interests are often tied to the local contract and impacted by state legislation. In addition, NYSUT has hired 11 part-time Retiree Services Consultants who are available to assist in-service local leaders interested in forming a retiree chapter within their own locals. A link to the Retiree Services Consultants Directory is included on page 6 of this handbook as a handy reference.

This easy-to-follow guide has been written to help in-service local leaders form retiree chapters in their own locals.

If you have 50 or more retirees on your local NYSUT membership list, it is probably time to consider forming a retiree chapter.



Why Your Local Needs a Retiree Chapter

1. The retiree chapter may organize retirees for the following activities and coordinate them with that of the in-service members:
 - a) community service projects and speakers (e.g. booths at fairs, teams for races, workday meetings, etc.)
 - b) political action
 - 1) letter-writing, post card and petition campaigns for local, state and national issues
 - 2) staff phone banks for crucial local, state and national elections
 - 3) hold informative workshops (e.g., health insurance, housing options for seniors, etc.)
 - c) maintain continuity and collegiality
2. The retiree chapter can collect VOTE-COPE funds from retired members, thus easing the job of the chair of that committee.
3. The retiree chapter can assist the local's membership secretary by maintaining and updating the retiree membership list.
4. The retiree chapter can assist the local's treasurer by collecting participatory fees from retiree members.
5. The retiree chapter may create its own informative newsletter or help with the local's newsletter preparation, at the request of the local.
6. Institutional and historical experience.

Why Your Retirees Need a Chapter

SOCIAL (“Meet and Eat”)

1. Maintain collegiality through luncheons, breakfasts, trips, and other activities.
2. Be a resource for professional information and contacts.
3. Maintain contact with retirees and in-service colleagues.
4. Maintain and continue professional unionship.

POLITICAL

1. Run a VOTE-COPE Drive.
2. Work to support federal and state legislation that improves the lives of retirees and in-service members.
3. Work to defeat federal and state legislation that is detrimental to retirees and in-service members.
4. Support local political issues (board elections, school budgets).

INFORMATIONAL

1. Sponsor and sometimes hold workshops on health insurance and other contractual issues affecting retirees.
2. Advise on status of contract negotiations.
3. Act as a resource for volunteers, employment, clubs and counseling.

How to Form a Retiree Chapter: 1-2-3

Before, during or after any of these steps, if you need assistance or information, contact your regional **NYSUT Retiree Services Consultant** (click link or paste text below in your browser::

<http://www.nysut.org/members/retirees/about-nysut-retirees-and-retirement>

1. Make sure your local constitution or by-laws establishes a retiree chapter (see sample constitutional language, page 8).
2. Gather a small group of retirees and local in-service officers to get the ball rolling (see sample agenda, page 7).
3. Draft a retiree chapter constitution (see sample for constitutional language, page 9).



Retiree chapters conduct many activities, but what happens with your chapter would be up to the energy and interests of retirees in your local. Most chapters have a “meet and eat” gathering twice a year for a general meeting. Other chapters publish newsletters, organize workshops, (pre-retirement for staff, housing options for seniors), and/or clubs (investment, book, etc.), and arrange trips, classes, and social activities.

Once you have officers of your retiree chapter, fill out the form on page 19 and return to NYSUT Retiree Services. This data shall be added to the Retiree Services leadership database which serves to facilitate communications with retiree council and chapter leaders. Retiree leaders listed on this database receive copies of the *Retiree Organizer*, the official newsletter of NYSUT Retiree Services.

Sample Agenda for Initial Meeting

1. Diagram the hierarchy of the union membership: retiree chapter, local, NYSUT, AFT, NEA.
2. Explain the purpose of forming a local chapter: social, informational, political.
3. Review the steps necessary to form a local NYSUT retiree chapter.
(see page 6)
4. Review sample local constitutional language that establishes a local retiree chapter. (see page 8)
5. Review sample retiree constitution language. (see page 9)
6. Organize and prioritize.
 - a) Secure a list of retired members (the NYSUT membership data can be listed alphabetically by code on the local's monthly membership report. This allows all retirees to be grouped together on the local's monthly membership list) and compare to the district's lists; (see page 18)
 - b) Seek funds for a mailing and general expenses (donations, local treasury).
 - c) Suggest language that incorporates a retiree chapter into the in-service local constitution to be voted on by the in-service membership if needed;
 - d) Set a date and secure a place for a general meeting where interim officers will be elected;
 - e) Draft a flyer for a general meeting and mail to known retirees.
7. Future organizational meeting(s)
 - a) Develop a retiree constitution to be presented at a luncheon or meeting;
 - b) Brainstorm committees so everything does not fall on the shoulders of a few
Examples:
 - Social (brunches, luncheons, field trips)
 - Community Relations (Habitat for Humanity, Dreamers, booths at local festivals, and other volunteer activities.)
 - Political (VOTE-COPE campaign, lobbying, phone banks for elections)
 - Newsletter
 - Designate representative(s), if possible, to the local's meetings and to the NYSUT Retiree Council

Suggested Constitutional Language Providing for a Retiree Chapter in a Local

ARTICLE: MEMBERSHIP

Special Members

a. Retired

1. Retired membership shall be open to all (name of district) School District retired personnel who have held active membership in the (name of local) for at least one year prior to retirement.
2. A retiree chapter shall be established within the (name of local) for the purposes of:
 - a) maintaining the ties of professional unity between in-service members and retirees;
 - b) representing and promoting the interests of retired members; and
 - c) providing a forum for exchanging information of interest and benefit to retired members and for the expression of their views
3. All members of the retiree chapter shall hold simultaneous membership in the state and applicable national affiliate (AFT) as a retiree. Retiree membership in the NEA is optional and at the expense of the member.
4. The retiree chapter shall establish a constitution that delineates membership, officers, committees and their responsibilities.
5. The Chair or a designee shall serve as a member of the Executive Board (or Executive Representative body) of the (name of local) and may have voting privileges on all matters except contractual considerations and issues of working conditions.

Sample Language for Retiree Chapter Constitutions

(Based on language compiled from existing retiree chapter constitutions)

ARTICLE I

Name

Section 1 - The organization shall be known as the [chapter name], herein called (anagram name).
The retiree chapter shall exist as a chapter of the [local name].

ARTICLE II

Purpose

Section 1: To promote the interests and welfare of all retired employees of the [local name] ([local acronym]).

Section 2: To promote mutual assistance and cooperation with other organizations with which it is associated (Retiree Council #__, NYSUT, AFT, NEA, AFL-CIO, ARA, NYSARA).

Section 3: To promote the aims and objectives of the [local name], and its state and national affiliates in matters that pertain to both in-service members and retirees.

Section 4: To maintain the ties of professional unity between in-service and retired personnel.

Section 5: To provide opportunities for its members to socialize and a forum for the exchange of information of interest and benefit to retired members, and for the expression of their views.

Section 6: To monitor legislation at both the state and national levels that may pertain to its members, and to keep its members informed of such legislation.

ARTICLE III

Membership and Affiliation

Section 1: Membership shall be open to all retirees who were members of the [local acronym] and NYSUT prior to retirement.

Section 2:

- A. There shall be two categories of members:
 - 1. participating: members who elect to pay the chapter dues, as determined by the Executive Committee;
 - 2. Inactive members, who do not elect to pay the chapter dues and who shall not receive the [chapter name] newsletter, notices of meetings, ballots, nor be eligible to hold office.
- B. Active members shall have equal rights and privileges in the organization, which shall include the right to nominate candidates, to hold office, to vote in elections and referendums, to attend membership meetings and to participate in deliberations and voting upon the business of the organization.
- C. [Chapter name] shall not discriminate against any group or individual on the basis of gender, age, creed, color, race, national origin, political activities, or membership in any professional union or group.

ARTICLE IV

Officers

- Section 1 - The officers of [chapter name] shall consist of a president or two co-presidents, vice president, secretary, and treasurer.
- Section 2 - There shall be an Executive Committee whose duties are outlined in Article V, Section 5.
- Section 3 - The officers shall constitute the Executive Committee, along with two (2) delegates at large, the immediate past president(s) and committee chairpersons.

ARTICLE V

Duties of Officers and Executive Committees

- Section 1 - President or Co-Presidents:
 - A. Administer the affairs and execute the policies of the organization;
 - B. Preside at all meetings of the Executive Committee and the General Membership;
 - C. Be the representative of [chapter name] to outside groups;
 - D. With the approval of the Executive Committee, establish the function of all committees, appoint members to all committees and serve as an ex officio member of all committees;

- E. Call regular and special meetings of the Executive Committee and the General Membership;
- F. Attend [local acronym] Exec-Rep monthly meetings;
- G. Co-sign checks for the [chapter name];
- H. Fulfill such other duties as the office requires, and as are consistent with the Constitution and By-laws.

Section 2 - Vice President:

- A. Assist the President(s) with his/her/their duties;
- B. Oversee the work of the committees;
- C. Assume the duties of the president(s) in case of his/her/their absence, disability, or upon the president's request;
- D. Be responsible for the VOTE-COPE drive among retirees.

Section 3 - Secretary

- A. Record and keep the minutes of all Executive and General meetings;
- B. Disseminate pertinent information to the general membership, including notification of meetings;
- C. Mail ballots for the election of officers;
- D. Preserve election records;
- E. Be responsible for all correspondence;
- F. Keep an official file of all [chapter name] matters;
- G. With the assistance of the treasurer, be responsible for the maintenance of up-to-date membership records.

Section 4 - Treasurer

- A. Mail dues notices and collect dues;
- B. Keep an accurate record of all revenues and expenditures;
- C. Prepare an annual budget;
- D. Report financial status to the membership, including an annual report of finances;
- E. Submit such reports to the (local name) as required by IRS rules;
- F. With the assistance of the secretary, be responsible for the maintenance of up-to-date membership records;

- G. Fulfill any duties related to financial matters;
- H. Write and co-sign checks.

Section 5- The Executive Committee

- A. Prepare and approve the annual budget;
- B. Act upon non-budgeted expenditures as may be required;
- C. Act on policy matters between General Meetings;
- D. Make policy recommendations for consideration by the general membership;
- E. Serve on standing committees;
- F. Interpret the Constitution and by-laws;
- G. Perform other duties as may arise for the smooth functioning of [chapter name];
- H. Approve all committee appointments.

ARTICLE VI
Standing Committees

Section 1 - Standing Committees shall be:

- A. Social
 - 1. The Social Committee shall consist of interested members appointed by the president.
 - 2. The Social Committee shall supervise the arrangements for various social functions.
- B. Legislation Committee
 - 1. The Legislation Committee shall consist of interested members appointed by the president.
 - 2. The Legislation Committee shall monitor state and national legislation pertaining to retirees and notify the membership of any recommended actions.
- C. Nominations and Elections
 - 1. The Nominating/Elections Committee
 - a. Shall consist of three members appointed by the president with the approval of the Executive Committee no later than (date) of the election year.
 - b. The chairperson shall be elected by the members of the Nominating/Elections Committee.

- c. The Nominating/Elections Committee shall be responsible for conducting the [chapter name] elections in accordance with the Landrum-Griffin Act and as determined by the Executive Committee, and shall present a slate of candidates for voting by the general membership.

2. Election of officers

- a) The Nominating/Elections Committee shall mail a notice to all active members advising them of the upcoming election, and requesting nominations for office, said nominations to be received no later than (date). A person may place himself or herself in contention for office in [chapter name].
- b) The Nominating/Elections Committee shall draw up a slate of officers to be elected for two-year terms of office.
- c) Upon approval of the slate, the Nominating/Elections Committee shall present it to the Executive Committee.
- d) At least 15 days prior to the election, a notice thereof shall be mailed to each member at his/her last known address.
- e) Elections for officers shall be held at the (date) meeting and shall be by secret ballot.
- f) Each member in good standing shall be entitled to one vote.
- g) The Nominating/Elections Committee shall count the ballots; election to office shall be by a majority vote of the ballots returned.
- h) Ballots and elections records shall be preserved for at least one year.
- i) All terms of office shall end on June 30th of the election year. New officers shall take office on July 1st.

3. Terms of Office

- a) Duly elected officers shall serve a two (2) year term beginning at the conclusion of the election meeting. Each officer shall remain in office until his/her successor assumes office.

4. Vacancies

- a) If the office of the president becomes vacant, the vice president shall assume the office of president.
- b) If any other office becomes vacant, it shall be filled by election by the Executive Committee until the next election is held by the general membership.

ARTICLE VII

Meetings

- A. General Membership meetings shall be held at least twice each year.
- B. A quorum at any General Membership meeting shall be (20) Active Members.
- C. Executive Committee meetings shall be held at least six times per year and at other times as deemed necessary.

ARTICLE VIII

Amendments

- Section 1 - Amendments to this Constitution may be proposed by a majority of the Executive Committee, or no fewer than 10 percent of the active members.
- Section 2 - A proposed amendment must be submitted in writing to the Executive Committee at least 15 days before the amendment vote and to the general membership at least 10 days before the amendment vote.
- Section 3 - In order to pass, an amendment must be approved by a 2/3 vote of the membership.

ARTICLE IX

PARLIAMENTARY AUTHORITY

- Section 1 - Robert's Rules of Order shall be the authoritative source for the conduct of meetings.

Local Letterhead

Kate Sweet
NYSUT Assistant IT Director
800 Troy-Schenectady Road
Latham, NY 12110-2455

Dear Kate:

We are in the process of forming a local retiree chapter. I have been advised that alphabetizing our membership list by code will group all the retirees together following an alphabetized list of in-service members. Please have NYSUT Member Records alphabetize our membership list this way in the future.

Also, please forward a list of names and addresses of any and all (name of local) retirees to (name and address of recipient) as soon as possible.

Thank you for helping in our organizing effort.

Sincerely,

(Name of President of Local)

An Important Note:

If your local does not currently maintain retirees on the NYSUT monthly membership list, complete the “Local Retiree Report Change” form on page 18.

Check box “C”; this option allows future retirees to be added to the local membership list. Return signed completed form to:

NYSUT Member Records
800 Troy-Schenectady Road
Latham, NY 12110

Please note, all of the steps outlined in this “Forming Chapters Guide” applies only to members that retire after the retiree chapter is formalized. If your local is interested in inviting former members to join your retiree chapter, contact Retiree Services or your Retiree Services Consultant to request a copy of the NYSUT Recapturing At-Large Members Guide which outlines the process in a step-by-step format.

THE FINAL STEP: FORMALIZING THE NYSUT RETIREE CHAPTER

To formalize the chapter and be recognized by NYSUT Member Records as a retiree chapter of your NYSUT local, complete the “Local Retiree Report Change” form on page 18. If this form is not filed with NYSUT Member Records, retired members may be deleted from the local’s membership list.

To notify NYSUT that your local has established a retiree chapter, check box “A.”
Return the signed and completed form to:

NYSUT Member Records
800 Troy-Schenectady Road
Latham, NY 12110

A Note Regarding Any Former NEA/NY

Members from Your Local:

If you wish to become a retiree member of NYSUT's other national affiliate, the National Education Association, you can join by paying a one-time fee (currently \$300) for lifetime NEA retiree membership by completing the "Retiree Membership Enrollment Form" available from NYSUT Member Records, the NYSUT Regional Office in your area or from your NYSUT Retiree Services Consultant.

If you are a non-lifetime NEA retiree member or know someone who has been lost from the NEA/NY rolls and wish to be a retiree member of NYSUT, the "Retiree Membership Enrollment Form" can be completed and returned to NYSUT Member Records for processing.

For further questions regarding the "Retiree Membership Enrollment Form" contact NYSUT Member Records at (800) 342-9810, ext. 6224.

LOCAL RETIREE REPORT CHANGE FORM

| |
|----------|
| Local #: |
|----------|

| |
|-------------|
| Local Name: |
|-------------|

Currently this local does **not** maintain their own retirees. When a member retires, they are removed from the local roster and are placed in the retiree council.

This local has instituted a provision to maintain retiree membership. Due to this change please make the change as indicated below (Select choice A, B, or C by placing a checkmark in the appropriate box):

Our local now:

A. has a retiree chapter (retirees are maintained and organized in a retiree chapter) [C]

- 1. Title of Chapter: _____
- 2. Retiree Contact's Name: _____
- 3. Retiree Contact's Address: _____
- 4. Retiree Contact's Phone: _____
- 5. Retiree Contact's E-mail: _____
- 6. Number of Members: _____ 7. Dues Amount: _____

B. provides retiree membership within local [L]

- 1. Retiree Contact's Name: _____
- 2. Retiree Contact's Address: _____
- 3. Retiree Contact's Phone: _____
- 4. Retiree Contact's E-mail: _____
- 5. Number of Members: _____ 6. Dues Amount: _____

C. maintains retirees on membership list, only [L]

Please send this local's membership list with in-service members listed alphabetically by last name, first, followed by retired members listed alphabetically by last name.

Thanks in advance for your cooperation.

_____ **Local President** _____ **Date**

_____ **Print Name Here**

**Please return completed form to:
NYSUT Member Records Department
800 Troy-Schenectady Road
Latham, NY 12110**

NYSUT Retiree Leadership Information

Name of retiree Council or Chapter _____ Local #: _____

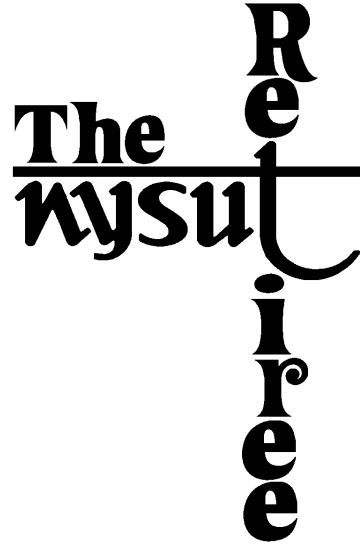
Check one of the Following:

- Retirees continue membership with local
- Retirees are members within a local's retiree chapter
- Regional organization of retirees
(Councils and other groups with members from more than one local)

Number of Members (approximate): _____

Dues: Yes _____ Amount: \$ _____ No _____

Date of Election: _____ to _____
mo/yr mo/yr



Officer 1 (Will be designated contact person):

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 2:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 3 :

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 4:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

NYSUT Retiree Leadership Information, page 2

Officer 5:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 6:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 7:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 8:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Officer 9:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

Editor:

Position _____

Name _____

Address _____

Telephone _____

E-mail _____

If necessary add extra sheet with other officers, and please return to:
NYSUT Retiree Services, 800 Troy-Schenectady Road, Latham, NY 12110