



LEADERSHIP HANDBOOK

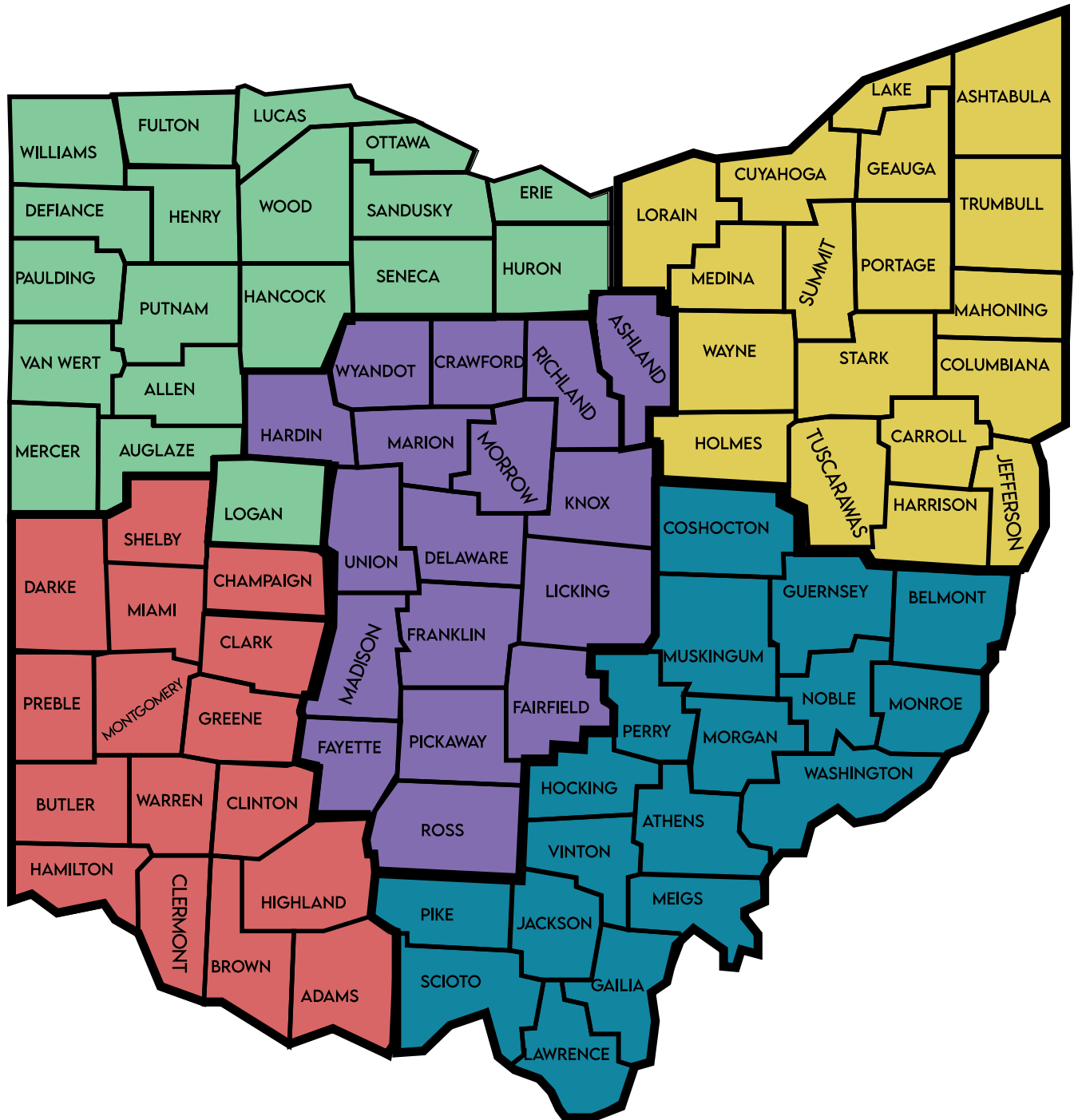
2020 EDITION

ORTA LEADERSHIP HANDBOOK

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ORTA'S 5 REGIONS



AMENDED AND REVISED BYLAWS OF THE OHIO RETIRED TEACHERS ASSOCIATION (ADOPTED OCTOBER 2017)

ARTICLE I-NAME AND PURPOSE

1. **NAME:** The name of this organization shall be the Ohio Retired Teachers Association, Inc., hereinafter known as the Association. The Association is also known as ORTA.
2. **PURPOSE:** ORTA'S mission is to monitor, advocate for, and protect the pensions and benefits of its members. The Association shall encourage individuals to improve the social and economic changes and issues relevant to their retirement.

ARTICLE II-MEMBERSHIP

1. Membership is open to any educator retired from the public schools, state and municipal colleges, and universities of Ohio; any educator retired in any other state but living in Ohio; any spouse who becomes a benefit recipient of State Teachers Retirement System (STRS); and any person in Ohio interested in education and the issues of retirees.

ARTICLE III-CHAPTER AFFILIATION

1. The Association shall utilize chapter affiliations to assist in accomplishing the purpose as set forth in Article I. The Association shall provide leadership for chapters to develop membership, and promote social and economic changes and issues relevant to retirement through exchanging information, providing workshops, and conducting conferences and leadership training.
2. Chapter affiliates shall follow the purpose of the Association as set forth in Article I and shall assist the Association in recruiting, forming, developing, and sustaining membership.

ARTICLE IV-ORGANIZATION

1. The state shall be divided into five (5) regions as determined by the Board, with three (3) liaisons for each region. Regions are to facilitate and unify the work of the Association, promote the successful operation of local chapters, and secure prompt and unified action toward accepted goals.
2. The five (5) regions of Ohio shall be Northwest, Northeast, Southwest, Southeast, and Central.
3. Liaisons must reside in the region of Ohio they represent.
4. The three (3) liaisons of each region shall cooperate fully together in their region of the state in all phases of their work for the local chapters and for the Association.

ARTICLE V- STATE BOARD

1. The corporate powers, affairs, and properties for the Association shall be exercised, conducted, and controlled by the STATE Board, hereafter known as the Board.

Each person serving on the Board shall be a member of the Association in good standing and shall be an STRS benefit recipient.

Board members shall be Ohio residents. Board members shall represent the Association only at Chapter or regional meetings, unless authorized by the President or Executive Director.

The necessary expenses of Board members (and non-members invited by the Board or the Executive Committee) in conducting the business of the Association shall be paid from the Association's treasury. Transportation expenses shall be paid from the member's permanent place of residence in Ohio to any board or committee meeting.

The Board may adopt policies, procedures, and standing rules of order to govern its own proceedings, transaction of business, and any other matters properly within the authority and discretion of the Board, as consistent with the State of Ohio, Articles of Incorporation and these Bylaws.

2. The Board shall consist of the President, the Immediate Past President, the President Elect, and one regional liaison from each of the five (5) regions. The Executive Director is a non-voting member of the Board. The Board shall elect a successor to fill the unexpired term of any member of the Executive Committee, except the President who shall be succeeded by the President Elect. An Executive Committee member completing an unexpired term shall be eligible for election to serve an additional term in that office. A vacancy created by any other member of the Board shall be filled in the same way used in selecting the original holder of the vacated position, unless otherwise determined by the Executive Committee.
3. Each region will elect one liaison each year by the spring meeting. Each liaison elected will serve a three year (3) term, or the remainder of an unexpired term and may succeed themselves once.
4. The duties of the Board members shall be:
 - a. To attend Board, committee, and ORTA sponsored meetings. Board meetings will be held semi-annually in the spring and fall. The President may call emergency Board meetings, after approval by a majority vote of the Executive Committee either at an official meeting or electronically.
 - b. To receive and review the secretarial, financial, and other reports.
 - c. To promote planning, developing, and implementing programs in cooperation with local chapters.
 - d. To work cooperatively with the liaisons in their respective regions by volunteering assistance and by responding to requests for help.
5. Unless another place is designated by the Board, the place of all meetings shall be the principle office of the Association. However, if necessary, any meeting may be held electronically.
6. Notice of the time and place of each Board meeting shall be given to each Board member, either by personal delivery, mail, or electronically at least two days before each meeting. Business transacted at all Board meetings shall be confined to subjects stated in the call and related matters.

(ARTICLE V, CON'T)

7. Except as otherwise provided in these Bylaws, a majority of the number of Board members shall be present in person or electronically at any Board meeting to constitute a quorum for the transaction of business. However, if a meeting is held electronically allowing all persons participating to communicate contemporaneously, then such participation shall constitute attendance at such meeting. Except as otherwise provided in these Bylaws, the act of a majority of the Board members present at any Board meeting shall be the act of the Board.
8. An official Board action may be taken without a meeting if approved by a majority of Board members voting in person or electronically. Any such action shall be entered into the record of the Association.
9. Any Board member may resign at any time by giving written notice to the President or Executive Director. A resignation shall take place at the time specified.
10. Any Board member may be removed, with or without cause, at any time by the affirmative vote of a majority of the elected Board members.
11. Board members shall avoid any conflict between their own respective, individual interests and the interests of the Association, and any and all actions taken by such Board member on behalf of the Association in their respective capacities. Board members shall conduct themselves in accordance with the requirements of law, these Bylaws, and such other policies, including policies on conflict of interest, as may be adopted by the Board.

ARTICLE VI-OFFICERS

1. The elected officers of the Association shall constitute the Executive Committee. The Executive Committee shall be composed of the President, the Immediate Past President, AND the President Elect. The Executive Director shall be a non-voting member of the Executive Committee. Candidates for election to the Executive Committee shall be recommended by the Nominating Committee or nominated from the floor, and shall be elected by the ORTA Board at the spring meeting for one-year terms. The Executive Committee shall take office August 1 following election. Its members shall be ineligible to succeed themselves in the same office.

The Executive Committee shall be responsible for necessary action between Board meetings. The Executive Committee shall employ and evaluate the Executive Director and set the compensation for that position.

Officers shall be STRS benefit recipients, Ohio residents, and members of the Association in good standing.

2. The President shall preside at all Association and Board meetings, carry out the instructions of the Board, and perform all duties of this office. The President shall appoint all committees. The President and President Elect shall be ex-officio members of all committees except the Nominating Committee.
3. If the President is incapacitated, the President Elect shall temporarily assume the duties and responsibilities of the President.

(ARTICLE VI, CON'T)

4. The Executive Director shall be directly responsible to the Executive Committee. The Executive Director shall administrate and manage the day-to-day operations of the Association. The Executive Director may employ staff as needed. The general duties of the Executive Director and staff shall be defined in the policies of the Association.
5. It is expected that Executive Committee members will attend as many meetings of the Executive Committee as possible.
 - a. Unless another place is designated by the President, the place of all meetings shall be the principle office of the Association. However, any meeting may be held electronically.
 - b. Notice of the time and place of each Executive Committee meeting shall be given to each Executive Committee member, either by personal delivery, mail, or electronically at least two days before each meeting. Business transacted at all Board meetings shall be confined to subjects stated in the call and related matters.
 - c. Except as otherwise provided in these Bylaws, a majority of the Executive Committee members shall be present in person or electronically at any Executive Committee meeting to constitute a quorum for the transaction of business. However, if meeting is held electronically allowing all persons participating to communicate contemporaneously, then such participation shall constitute attendance at such meeting. Except as otherwise provided in these Bylaws, the act of a majority of the Executive Committee members present at any Executive Committee meeting shall be the act of the Executive Committee.
 - d. Any action which may be authorized or taken at an Executive Committee meeting may be taken without a meeting if authorized by a statement signed by each of the Executive Committee members, or submitted by an Executive Committee member electronically to a designated Executive Committee officer.
Any such statement shall be filed with or entered into the record of the Association.
6. Any officer may resign at any time by giving written notice to the President or Executive Director. A resignation shall take place at the time specified.
7. Any Executive Committee member may be removed, with or without cause, at any time by the affirmative vote of a majority of the Executive Committee members then in office.
8. Executive Committee members shall avoid any conflict between their own respective, individual interests and the interests of the Association, and any and all actions taken by such Executive Committee member on behalf of the Association in their respective capacities. Executive Committee members shall conduct themselves in accordance with the requirements of law, of these Bylaws, and such other policies, including policies on conflict of interest, as may be adopted by the Executive Committee.

ARTICLE VII-COMMITTEES

1. **Nominating Committee:** The President, at least 90 days before the Fall meeting, shall appoint a committee of three members to serve as the Nominating Committee and shall notify the Board of the names of the committee members. The Nominating Committee shall develop a resume format and make it available to anyone interested in a position on the Executive Committee. The Nominating Committee shall consider all individuals who submit resumes. The Nominating Committee shall nominate one or more persons for each elective office of the Executive Committee except that of the President, which office will be automatically filled by the current President Elect. The nominating committee shall report these nominations at the Fall Board meeting. Nominations may be made from the floor.
2. **Finance Committee:** The President shall appoint this committee to take effect August 1. Prior to the Spring Board meeting in the year serving, this committee shall review the current budget and outside auditor's report and make recommendations with respect to financial matters.
3. **Standing State Committees:** The President may appoint state standing committees in the following areas:
 - a. Membership & Pre-retirement Planning
 - b. Communications (Public Relations & Technology)
 - c. Organizational (Nominations, Elections, & Bylaws)
 - d. Legislative
 - e. Community Services & Protective
4. **Authority and Manner of Acting:** Each committee shall assume responsibility for researching the assigned area and providing appropriate recommendations to the Board. Each committee shall arrive at recommendations by the majority of its members at a meeting or through electronic communication. All committees shall file minutes of meetings with the Executive Director to be entered into the records of the Association.

ARTICLE VIII-CHAPTERS

1. Chapter officers shall be reported to the State office by January 1st.
2. Chapter officers and chairs of the chapter standing committees must be ORTA members in good standing.
3. Chapters must submit bylaws with the State office.
4. Chapters must submit annual reports by January 15th.

ARTICLE IX-DUES

1. The dues of the Association shall be as follows:
 - a. Annual and lifetime membership dues shall be determined by the Board.
 - b. The membership year of the Association shall be August 1 through July 31.

ARTICLE X-MEETINGS

1. ORTA may hold state or regional conferences for members. Meeting arrangements will be determined by the Executive Committee with the cooperation of regional liaisons.

ARTICLE XI-STATUS

The Association is intended to be and remains a 501(c) (4) non-profit corporation organized and existing for the mutual benefit of retired educators.

The Association and its Board shall refrain from any action or activity which might harm its status as an organization whose receipts are exempt from income taxes.

The Association shall be dedicated to education, social, charitable, and beneficial purposes.

No membership lists or directories shall be available to anyone except for Association purposes.

ARTICLE XII-AMENDMENTS

The Bylaws of the Association may be amended by an affirmative vote of a simple majority of the voting members present. Voting may take place by any of the following: **(a)** a state meeting, **(b)** an area or district meeting, **(c)** by mail, or **(d)** electronically. The Board shall have approved the proposed amendment, and notice of such amendment shall have been published in an official ORTA publication.

ARTICLE XIII-RULES OF ORDER

The President shall appoint a parliamentarian before each official meeting of the Board. Except as otherwise provided in the Bylaws or the Standing Rules, Robert's Rules of Order, latest revision, shall govern the Association in its procedures.

ARTICLE XIV-LOGO

The Association shall have an official corporate Logo in form and content as shown here:



ARTICLE XV-DISSOLUTION

This Association may be dissolved only after:

1. An affirmative vote of at least two-thirds (2/3) of the total membership of the Board, and
2. Thereafter, an affirmative vote of at least two-thirds (2/3) of the members of the Association casting ballots, provided notification of each election is announced at least 60 days before the voting takes place.

In the event of dissolution, whether voluntary or involuntary or by operation of law, its property and assets shall be given to an Ohio education or charitable organization(s) selected by the Board. Such organization shall be an exempt organization under Section 501(c) (4) of the Internal Revenue Code, as amended.

ARTICLE XVI-PROHIBITION AGAINST SHARING IN ASSETS

No member or employee of the Association shall receive at any time any net earnings or pecuniary profit from the operation of the Association, except that payment shall be made for reasonable compensation or expenses for services rendered to or for the Association in carrying out its purposes as fixed by the Board.

CODE OF ETHICS FOR OHIO RETIRED TEACHERS ASSOCIATION BOARD OF DIRECTORS AND STAFF

Rationale:

Principles and practices of the Ohio Retired Teachers Association Board of Directors and staff to provide guidance and direction for effective governance.

Code:

Directors of the Board of Directors and staff are committed to observing and promoting the highest standards of ethical conduct in the performance of their responsibilities on the Board and staff of The Ohio Retired Teachers Association. Board directors and staff pledge to accept this code as a minimum guideline for ethical conduct and shall:

Accountability:

1. Faithfully abide by the bylaws, standing rules and policies of the organization.
2. Exercise reasonable care, good faith and due diligence in governing and managing affairs.
3. Fully disclose, at the earliest opportunity, information that may result in a perceived or actual conflict of interest.
4. Fully disclose, at the earliest opportunity, information of fact that would have significance in Board decision-making.
5. Remain accountable for prudent fiscal management to association members, the Board, and non-profit sector, and where applicable, to government and funding bodies.

Professional Excellence and Integrity:

6. Maintain professional level of courtesy, respect, and objectivity in all matters and activities.
7. Strive to uphold those practices and assist other directors of the Board in upholding the highest standards of conduct.

Prohibition Against Personal Gain and Self-Dealing:

8. Exercise the powers invested for the good of all members of the organization rather than for personal benefit.

Equal Opportunity, Diversity, and Inclusiveness:

9. Ensure the right of all members to access benefits and services without discrimination on the basis of legally recognized protected classes such as race, color, religion, sex, national origin or ancestry, age, military status, genetic information, pregnancy, disability, sexual orientation, and gender identity, or on the basis of culture, geography, political beliefs, or socio-economic status, or any other basis prohibited by federal, state, or local law.

10. Ensure the right of all members to access benefits and services without discrimination on the basis of the organization’s volunteer or staff make-up in respect to race, color, religion, sex, national origin or ancestry, age, military status, genetic information, pregnancy, disability, sexual orientation, gender identity, or any other basis prohibited by federal, state, or local law.

Confidential Information

11. Respect the confidentiality of sensitive information known due to Board service and used for the purposes of governance and management.

Collaboration and Cooperation

12. Respect the diversity of opinions as expressed or acted upon by the organization, Board, staff, and membership, and formally register dissent as appropriate.

13. Promote collaboration, cooperation, and partnership among association members.
{Rev. 10/24/2016} [NOTE: Insert whatever date formal action is taken to revise]

Whistle-blower Policy

I. General

The organization expects its directors, officers, staff members, and other representatives to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As representatives of the Ohio Retired Teachers Association, we are obligated to practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations.

II. Reporting Responsibility

It is the responsibility of all directors, officers, and staff members to report “Wrongful Conduct” in accordance with this Whistle-blower Policy.

III. Wrongful Conduct

“Wrongful Conduct” is defined in this Whistle-blower Policy to include: a serious violation of the Ohio Retired Teachers Association policy; a violation of applicable federal, state, or local law; or the use of Ohio Retired Teachers Association property, resources, or authority for personal gain or other non-organization-related purpose except as provided under the Ohio Retired Teachers Association policy. This definition of Wrongful Conduct is not intended to be an exclusive listing of the illegal or improper activity encompassed by the Whistle-blower Policy. Rather, the Whistle-blower Policy is intended to serve as a means of reporting all perceived serious improprieties that potentially impact the integrity and effective operation of the association.

IV. Acting in Good Faith

Anyone filing a complaint of Wrongful Conduct must be acting in good faith and have reasonable grounds for believing the information disclosed indicates Wrongful Conduct. Any allegations that prove false and that prove to have been made maliciously or with knowledge of their falsity will be viewed as a serious offense, for which discipline (if a staff member) or removal from the Board (if a director) may result.

V. No Retaliation

No director, officer, or staff member who in good faith reports Wrongful Conduct will suffer harassment, retaliation or adverse employment consequence. Any director, officer, or staff member who retaliates against anyone who has reported Wrongful Conduct in good faith is subject to discipline, up to and including termination of employment or removal from the Board of Directors, as applicable. This Whistleblower Policy is intended to encourage and enable individuals to raise serious concerns within the Ohio Retired Teachers Association prior to seeking resolution outside the Ohio Retired Teachers Association.

VI. Reporting Wrongful Conduct

The organization encourages its directors, officers, and staff members to share their questions, concerns, suggestions, or complaints with someone who can address them properly. Any director, officer or staff member may report Wrongful Conduct to the Executive Director or the President of the Ohio Retired Teachers Association. If the Wrongful Conduct implicates one or both of the Executive Director or the President, or if the reporting individual is not comfortable speaking with or not satisfied with response of the foregoing individuals, the issue may be reported to any director of the Board of the Ohio Retired Teachers Association.

VII. Confidentiality

Reports of Wrongful Conduct or suspected Wrongful Conduct may be submitted on a confidential basis by the complainant or may be submitted anonymously. Reports of Wrongful Conduct or suspected Wrongful Conduct will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

VIII. Handling of Reported Wrongful Conduct

A representative of the Board of Directors will notify the sender and acknowledge receipt of the Wrongful Conduct or suspected Wrongful Conduct within five business days, unless such report was submitted anonymously. All Reports will be promptly investigated and appropriate action will be taken if warranted by the investigation.

Rev. 10/24/2016 [NOTE: Insert whatever date formal action is taken to revise]

Document Retention and Destruction Policy

This Document Retention and Destruction Policy of The Ohio Retired Teachers Association identifies the record retention responsibilities of staff, volunteers, directors of the Board, and outsiders for maintaining and documenting the storage and destruction of the Association's documents and records.

1. Rules. The Association's staff, volunteers, directors of the Board and outsiders (i.e., independent contractors via agreement) are required to honor these rules: (a) paper or electronic documents indicated under the terms for retention below will be transferred and maintained by the ORTA State Office; (b) all other paper documents will be destroyed after three years; and (c) all other electronic documents will be deleted from all individual computers, data bases, networks, and back-up storage after one year; and (d) no paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.

2. Terms for retention.

a. Retain Permanently :

Governance records – Charter and amendments, bylaws, other organizational documents governing the Board, and Board committee minutes.

Tax records – Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax audits.

Intellectual property records – Copyright and trademark registrations and samples of protected works.

Financial records – Audited financial statements, attorney contingent liability letters.

b. Retain for TEN years:

Pension and benefit records – Pension plan participant/beneficiary records, actuarial reports, related correspondence with government agencies, and supporting records.

Government relations records – State and federal lobbying and political contribution reports and supporting records.

c. Retain for THREE years:

Employee/employment records – Employee names, addresses, social security numbers, dates of birth, INS Form I-9, resume/application materials, job descriptions, dates of hire and termination/separation, evaluations, compensation information, promotions, transfers, disciplinary matters, time/payroll records, leave/comp time/FMLA, engagement and discharge correspondence, documentation of basis for independent contractor status (retain for all current employees and independent contractors and for three years after departure of each individual).

Lease, insurance, and contract/license records – Software license agreements, vendor, hotel and service agreements, independent contractor agreements, employment agreements, consultant agreements, and all other agreements (retain during the term of the agreement and for three years after the termination, expiration, non-renewal of each agreement).

d. Retain for ONE year:

All other electronic records, documents and files – Correspondence files, past budgets, bank statements, publications, employee manuals/policies and procedures, survey information

Exceptions:

Exceptions to these rules and terms for retention may be granted only by the Executive Director or the ORTA President.

{Rev. 10/24/2016} [NOTE: Insert whatever date formal action is taken to revise]

Conflict of Interest Policy

I. Statement of Policy

A possible conflict of interest exists when a director has a material personal interest, either direct or indirect, in a proposed transaction involving this organization. When a director has an interest in a transaction being considered by the organization, the director should disclose that conflict as early as possible and at least before the Board of Directors or staff member takes action on the matter. Any director having a conflict of interest will not vote or use his or her personal influence on the matter and will not be present when the matter is discussed by the Board. The minutes of the meeting will reflect that a disclosure was made and the abstention from voting.

Directors, officers, committee chairs, and staff members of the association will be required to attest annually to their familiarity with this policy and to provide information concerning any possible conflict of interest so that disclosure, if necessary, is made. Staff members will not benefit materially from the association beyond receipt of salaries, fringe benefits, and reimbursement for authorized expenses.

II. Definition of Material Personal Interest

A material personal interest is:

1. An ownership interest, directly or indirectly, through business, investment or family, in any entity with which this organization has a transaction or arrangement;
2. Excluding staff pay, a compensation arrangement with the organization or with any entity or individual with which the organization has a transaction or arrangement; or
3. As defined above, a potential ownership interest in, or compensation arrangement with, any entity or individual with which the organization is negotiating a transaction or arrangement.

III. Procedures

1. The interested director(s) will disclose to the Board, preferably in writing, the material facts as to his or her material personal interest in the transaction and in any corporation, partnership, association or other organization involved in the transaction prior to the meeting at which the Board acts upon the transaction.
2. The interested director(s) will absent himself or herself from the meeting while the transaction is discussed and acted upon.
3. A disinterested director, or other disinterested party familiar with the transaction, will present evidence of the fairness of the proposed transaction, such as competitive bids or comparable price quotations.
4. The vote of a majority of the disinterested directors participating in the meeting and constituting a quorum, after reaching a decision regarding whether the proposed transaction is fair to the organization, will be required for approval of the transaction. The minutes for the meeting will reflect that a disclosure of interest was made and that the interested director(s) abstained from voting and was not present during the Board's consideration of the transaction.
5. These procedures (i) will apply to transactions approved after the date of adoption of this policy; and (ii) will not apply to reimbursement of expenses actually incurred by any director in the course of performing his or her duties as such.

IV. Potential Conflict Report

To assist in implementing this Policy, each proposed new director will file the Conflict Disclosure Statement in the form of Exhibit A hereto in connection with the selection process. Existing directors and staff will file the Conflict Disclosure Statement annually, each December, with the Executive Director, whose responsibility it will be to oversee the annual distribution of such forms to existing directors.

{Rev. 10/24/2016} [NOTE: Insert whatever date formal action is taken to revise]

RESPONSIBILITIES OF ORTA PRESIDENT

The ORTA President shall be elected before the Spring Board Meeting, and shall take office August 1, the following year. The President shall be ineligible to succeed him or herself in same the same office. The duties of the President are defined in the ORTA By-Laws, Article VI, Sec. 2.

1. Responsibility to ORTA Board:

- a. Preside at all meetings of the Association and of the Board, carry out the instructions of Association and the Board and perform all the duties that pertain to this office.
- b. By August 1, following the Fall Board Meeting, at which you were installed, submit information for an introductory article that will appear in the August edition of the Newsletter.
- c. Write an article for the Presidents section of the Newsletter monthly; Please send your copy by first second Monday of every month, as the Newsletter is published by the 20th of each month. This will allow for proper editing and formatting time.
- d. Appoint all Committees, including committee chairs in summer after the Spring Board Meeting,, but prior to the start of the New Year/Term included in Standing Rule 10, Sec. 4. Survey Board members for their preferred committee assignments at the Spring Board Meeting. Committee assignments should be mailed to Committee Chairs by mid-August
- e. Establish a meeting schedule for the Executive Committees
- f. Establish a theme for the year that will be accepted , supported and promoted by the Association.
- g. Establish goals to for the year that will result in a positive direction for the Association.
- h. Provide information and direction for the Chairs of the committees.
- i. Serve as Chair of the Executive Committee and attend all meeting of said committee.
- j. Work cooperatively with the Executive Director and ORTA staff to help identify important needs and important future actions.
- k. Work with the Executive Director to create an agenda for the ORTA Board meetings in Columbus, held semi-annually in the spring and fall, Executive Committee meetings and any special called meetings.
- l. Establish a regular and dependable means of communication with members of the Board, ORTA staff, and Regional Liaisons and local Chapter leaders. Work cooperatively with those individuals in all phases of the work for the local chapters and the Association.
- m. The President shall be an ex-officio member of all committees except the Nominating Committee and serve as liaison to the Legislative Committee
- n. Be familiar with and uphold the By-Laws, Standing Rules and other information in the ORTA Leadership Handbook.
- o. Chair through the Executive Committee the evaluation and contract recommendation for the Exec. Director in years when the evaluation is due.

(Presidential Responsibilities, con'd)

2. Responsibility to Chapters:

- a. Attend chapter meeting when invited to update then on ORTA or STRS information
- b. Attend Presidents' Meetings held by Regional Liaisons when requested
- c. Serve as a resource person for information on ORTA issues.
- d. Promote membership in local chapters and ORTA.
- e. Encourage attendance by local chapters at ORTA meetings.
- f. Promote participation on ORTA committees.
- g. Assist with leadership training or other meetings in cooperation with the chapters, districts, and or the state office.

The President must be a STRS recipient, an Ohio resident and an ORTA member in good standing.

The Board shall remove the President for consistent failure to participate defined as non-attendance or inactivity.

The ORTA office will reimburse reasonable expenses for meeting meals, mileage and supplies incurred in carrying out the work of ORTA. The President is also not reimbursed for attending their own chapter meetings.

In the event that the Association is represent by Co-Presidents, they will be considered on equal footing in that position. However, those sharing that position will be treated as one single member with one vote. If both people sharing a position choose to attend the same meeting, expenses will be paid based on one person and divided equally between the two sharing members. Both members who enter a co-sharing position will notify the ORTA Executive Director of how tasks and responsibilities will be shared. As the position is a full-time position, it may revert to being filled by one person.

RESPONSIBILITIES OF ORTA PRESIDENT ELECT

The ORTA President Elect shall be elected before the Spring Board Meeting, and shall take office August 1, the following year. The President Elect shall be ineligible to succeed him or herself in same the same office. The duties of the President are defined in the ORTA By-Laws, Article VI, Sec. 4, and further in clarified in Standing Rule 4, Sec, 3b.

1. Responsibility to ORTA Board:

- a. Work cooperatively with the President to ensure continuing
- b. Serve as part of the Executive Committee and attend all meeting of said committee.
- c. Attend ORTA Baord meetings in Columbus, held semi-annually in spring and fall and any special meetings.
- d. Attend respective state, district or area meetings and participate as needed in training sessions and facilitation of workshops.
- e. The President Elect shall be an ex-officio member of all committees except the Nominating Committee and serve on committees as appointed by the President.
- f. Be familiar with and uphold the By-Laws, Standing Rules, and other information in the ORTA Leadership Handbook
- g. Participate in the decision-making and policy-making functions of the Board, considering the needs of ORTA and area of the state.
- h. Bring to the attention of the ORTA Board pertinent concerns, interests and views representative of their work across the state.
- i. If the President is incapacitated, the President Elect shall temporarily assume the duties and responsibilities.

2. Responsibility to Regions and Chapters:

- a. Attend chapter meeting when invited to update them on ORTA or STRS information.
- b. Attend Presidents' Meeting held by Regions when requested.
- c. Establish a regular and dependable means of communication with Directors, Liaisons and Chapter leadership and work cooperatively with those individuals in all phases of the work for the local chapters and the Association.
- d. Serve as a resource person for information on ORTA issues.
- e. Promote membership in local chapters and ORTA.
- f. Encourage attendance by local chapters at ORTA meetings.

g. Promote participation in committees approved by ORTA,

h. Assist with leadership training or other meetings in cooperation with the chapters, districts, and or the state office.

The President Elect must be an STRS recipient and be in good ORTA standing.

The Board shall remove the President Elect for consistent failure to participate defined as non-attendance or inactivity. A President Elect that misses two consecutive Board Meetings shall be subject to removal at the second Board meeting.

The ORTA office will reimburse reasonable expenses for meeting meals, mileage and supplies incurred in carrying out the work of ORTA. The President Elect is also not reimbursed for attending their own chapter meetings.

In the event that the Association is represent by Co-Presidents Elect, they will be considered on equal footing in that position. However, those sharing that position will be treated as one single member with one vote. If both people sharing a position choose to attend the same meeting, expenses will be paid based on one person and divided equally between the two sharing members. Both members who enter a co-sharing position will notify the ORTA Executive Director of how tasks and responsibilities will be shared. As the position is a full-time postion, it may revert to being filled by one person.

REGIONAL LIAISONS: RESPONSIBILITIES OF REGIONAL LIAISONS

Each region (NW, SW, NE, SE, C) shall elect one Liaison each year by the spring meeting. The Liaison elected will serve a three-year (3) term, or the remainder of an unexpired term and may succeed themselves once. One Liaison from each region shall represent the region at state wide meeting(s) of the ORTA Board.

Responsibilities of Regional Liaisons to the ORTA Board:

1. Attend the state-wide ORTA Board meeting(s) and vote on matters presented to the ORTA Board.
2. Communicate the needs and interests of the region to the ORTA office and ORTA Executive Committee.
3. Coordinate Regional Meetings including Local Chapter Officers and participate in training as needed.
4. Chair/Serve on ORTA state-wide committees as appointed by the ORTA President/Executive Committee.
5. Be familiar with the Bylaws, Standing Rules, and other information in the ORTA Leadership Handbook.
6. Participate in decision making and policy making functions of the ORTA Board.
7. Complete and submit to the ORTA office a year-end report of accomplishments and activities of the Local Chapters and Region.

Responsibilities of Regional Liaisons to the Region:

1. Attend Chapter meetings within the region as appropriate to update them on ORTA or STRS information.
2. Establish regular means of communication with Local Chapter Officers and work cooperatively with those individuals in matters of importance to ORTA and the individual Local Chapters.
3. Promote membership and participation in ORTA and in Local Chapters.
4. Participate in leadership training or other meetings in cooperation with Local Chapters and ORTA initiatives.
5. Complete and submit to the Local Chapters a year-end report of accomplishments and activities of the Region.

Regional Liaison Annual Report

Date: _____

Region: _____

Number of Local Chapters Represented: _____

Number of Local Chapters Visited: _____

Accomplishments of the Region:

Regional Meetings (description, attendance, any supporting documentation):

Regional Activities (volunteer hours reported, description of major events held in region):

Membership Efforts (describe efforts taken to strengthen ORTA's voice through increases in membership):

STATE COMMITTEE FORMATION AND RESPONSIBILITIES

1. The ORTA President appoints State Committee chairpersons and members in the spring for the following year:
 - a. All Committees are chaired by a member of the ORTA Board
 - b. Committee members should be a blend of Board members and general ORTA members in good standing
 - c. Each committee will have an ORTA Executive Committee officer as a liaison
 - d. ORTA President provides committee chairperson with goals of committee
2. Each Committee Chairperson needs to schedule his/her committee to meet at the ORTA office before the first of October in order to review information submitted by Chapters meeting January 15th deadline.
 - a. Survey possible dates with committee members and sure that the ORTA office is available for the meeting before confirming meeting date
 - b. Establish needed criteria based on goals for meeting
 - c. Ask committee members to evaluate report form and submit suggestions to ORTA President or Executive Director
 - d. Provide periodic training and on-going support for local chapter committees
 - e. Prepare and file minutes of all meetings with the Executive Director to be filed with entered upon the records of the association
 - f. Submit an article for the monthly e-newsletter based on information, gatherings suggestions and recommendations for chapters, etc.
 - g. Return chapter forms to ORTA secretary for filing. These forms are not to be removed from the ORTA office area
 - h. When Regional meetings are held, the five regional Liaisons all should be prepared to facilitate a workshop with Chapter Committee Chairpersons and interested members in attendance
3. ORTA Chapter Report Forms and Informational Packets:
 - a. Chapter Report Forms need to be postmarked by January 15th, documenting the chapter work from the prior year
 - b. Forms and packets are available on the ORTA website; If you need additional assistance, please contact the ORTA office
 - c. Each Chapter President is given a Leadership Handbook that can also be found on the ORTA website

RESPONSIBILITIES OF THE ORTA COMMITTEE CHAIRS

The ORTA incoming President appoints all committee chairs and committee members after the Fall Board Meeting and before the first of January of the following year. All Committees are chaired by Board members but Committee membership is encouraged to have a balance of Board members as well as selected general members and interested persons.

1. Responsibility of Standing Committee Chairs

- a. Chair committees as appointed by the President and hold your initial committee meeting before the first of October. The initial meeting is to look at goals for the year and review the information received from the chapter reports.
- b. Clear your meeting date with the ORTA office and provide a lunch count one week in advance. Lunch is provided for committee members
- c. Prepare criteria to be used in this review prior to the first committee meeting. For example, you might look at projects, activities, challenges, suggestions made, etc.
- d. Write an article for the Newsletter summarizing information from your committee review
- e. Discuss with committee members any needed revisions to the report form or in the information packet. Please note that the information packet is the same information contained in Section Six of the Leadership Handbook
- f. Provide local chapter support in your committee area when asked
- g. Be familiar with Bylaws, Standing Rules and other information in the Leadership Handbook regarding duties pertinent to their position as well as their respective committee information. Each year, information packets are sent from the ORTA office to each ORTA Committee Chair and Chapter President. If a chapter chair does not receive the new information, contact should be made with the chapter president
- h. Attend ORTA Board meetings in Columbus, held semi-annually in spring and fall, and any special called meetings to report on behalf of your committee
- i. Attend respective state, district or area meeting and participate as needed in training sessions on behalf of your committee. In years when Regional meetings are held, participate and facilitate a workshop with chapter committee chairs
- j. Prepare and file minutes of all meetings. These are to be given to the Executive Director as official records of the Association

2. Responsibility of Nominating Committee Chair: (Bylaws Article VII, Section 1)

- a. The Nominating Committee is always chaired by the Immediate Past President and has two additional members
- b. At least 90 days before the Spring Board Meeting, develop a resume format and make it available to anyone interested in a position on the Executive Committee
- c. Consider all individuals who submit a resume
- d. Nominate one or more persons for each office on the Executive Committee except that of President
- e. Report these nominations at the Spring Board Meeting and call for nomination from the floor

The office of the President will be automatically filled by the President Elect on August 1st

3. Responsibility of Finance and Auditing Committee Chair:
 - a. Review annual budget for the for the ensuing year as submitted by the Executive Director and make recommendation regarding adoption at the Fall Board Meeting
 - b. Meet with an outside auditor prior to the Spring Board Meeting to receive report of previous years financial statements
 - c. Make recommendation to the Board in respect to policies and financial matters

4. Responsibility of Bylaws and Standing Rules Committee Chair:
 - a. Recommend proposed changes of the bylaws or standing rules to the Executive Committee for its approval and submission to the Board
 - b. State needed bylaws changes and reason for proposed change which shall be published in an official ORTA publication before voting by the membership
 - c. State needed standing rules changes to and reason for proposed change which shall be presented to the Board before voting by the Board

A member of the Executive Committee will be assigned to each committee except Nominating to act as an ex-officio committee member.

In order to assure a quorum to conduct business, please allow committee members to give input into possible meeting dates. All dates must be cleared through the ORTA State Office as meetings are to be held at the state office. Setting a date without clearance may result in no meeting room available as several committees are scheduling meetings for one room.

Any committee shall act by majority of all it's members at a meeting or through other communications as permitted by laws of the State of Ohio, or by a statement or statements signed by all it's members.

A committee is authorized to take any action or transact any business specifically delegated by the Board.

New forms and information packets are made available to all chapter committee chairs and committee members. If a representative does not receive the forms or information packets, they should reach out to the chapter president and then call the ORTA office to have needed items forwarded.

Most information and reference items can be found at www.orta.org

The Board shall remove any ORTA Committee Chair for consistence failure defined as non-attendance or inactivity.

Committee Chairs are reimbursed for all reasonable expenses incurred while attending ORTA Board meetings and conducting other ORTA business other than at their own chapter board meetings. Committee Chairs are not reimbursed for attending meeting of the Ohio legislature or STRS unless their attendance is requested.

MEMBERSHIP COMMITTEE

“REACH OUT AND TOUCH SOMEONE”

...is an old but familiar telephone commercial that can be adapted appropriately to the local Membership Committee. The committee must “reach out” until all retired educators have been contacted and have joined the ORTA and the local chapter. Legislators ask how many people are sponsoring a bill, so numbers are important to you and to the ORTA.

THE COMMITTEE

The strength of the local chapter and the ORTA rests with its membership, whose plans and actions determine success. This committee is responsible for recruiting, reclaiming former members and for retaining current members. This is so vital to the effectiveness of the local chapter and of the ORTA that the cooperation of the chapter’s FULL membership should be solicited.

“EVERY MEMBER GET A MEMBER” should be the slogan of each local chapter.

TELL IT LIKE IT IS

1. Membership in the local chapter and in the ORTA brings prestige and commands respect.
2. The esprit de corps among the membership is unique.
3. Membership is the way to keep up one’s professional contacts on a regular basis.
4. The voices and support of ALL retired teachers are needed in the legislative process in order to enact legislation of benefit to retired teachers.
5. Membership offers an opportunity to continue the leadership qualities one used so effectively as a teacher. Educators continue to be active, creative and productive citizens through association with other retired professionals.
6. Membership Benefits make membership a particularly good deal. By taking advantage of the many benefits provided by the ORTA, members can actually save the cost of dues many times over.

RECRUITING NEW RETIREES

Help your Retirement Planning Committee plan a Retirement Planning Seminar, inviting those who will be retiring within the next few years. At least, have a membership reception each year for new retirees. Make a special effort to recruit retired university professors if you have a college or university in your area. Remember, anyone in the STRS system, and their spouses, is eligible to be a member. Associate memberships are available for active teachers and persons interested in education and the issues of retired educators.

Put information regarding your meetings in active teachers’ publications, give the name, address and telephone number of your membership chairman. In this day and age, don’t forget email addresses, fax numbers, and web sites as well. Ask your local superintendent’s office for the names and addresses of newly retired teachers. Watch the news- papers for articles regarding them. “Strike while the iron is hot.” As soon as they retire, let them know you are interested in them. Be sure someone from your chapter sends the names and address of the new retirees to the ORTA.

Make everyone feel welcome. Assign older members to sit with the new members at meetings. Give new members the name of a member of the membership committee they can call if they have questions. Announce new members names in the chapter bulletins and newsletters. Vary the ways of identifying new members at chapter meetings.

REMEMBER . . .

It is also most important that chapter recruit those who are not new retirees but who have not joined the local chapter or the ORTA. Here one can refer to the sense of fair play. It is not fair for all to reap the benefits unless all have helped to bring them about.

RETAINING CURRENT MEMBERS

1. One of the keys to retaining members is through interesting and exciting meetings which inspire, inform and challenge the membership, while providing opportunities for good fellowship.
2. Another way to keep your members interested is through chapter bulletins or newsletters. Some schools will permit their students to print a newsletter at a minimal cost. When members know what is going on - and why - they will more readily support the organization.
3. Involvement is crucial! Make sure all members feel a 'part of the action.' Keeping members involved in the action is part of the old saying of 'use it or lose it!'

RECLAIMING FORMER MEMBERS

Determine why former members did not maintain membership.

Did they not feel welcome?

Did they have opportunities to participate? (Remember the woman who went home from a meeting and told her husband it was the best she had ever attended. When he asked, "Why?" she said, "Well, I got to talk twice!") Analyze your feelings about your chapter. They will give you some clues to help you assist your chapter overcome weaknesses.

If former members are physically unable to attend meetings, talk with them about the importance of financially supporting the chapter and the ORTA. Some chapters waive, or pay the membership dues of those who are financially unable to pay them.

ORTA DUES

The annual dues are \$30.00 and Life Membership is \$500.00. Many new retirees prefer life membership because it is a particularly good deal. Some older members become life members to express appreciation for the work of ORTA. It is a convenient one-time payment and avoids possible dues increases.

When both husband and wife are STRS retirees, encourage both of them to belong to the chapter and to ORTA. Both receive increases when granted and are eligible for member benefits from ORTA and STRS. It is only fair that all who benefit from the legislative efforts of the chapter and ORTA should support the organizations.

NOTE:

Disability retirees and STRS beneficiaries are eligible for regular membership. Associate membership is available for active teachers and anyone interested in education in Ohio.

LEGISLATIVE PROTOCOL (2001)

PRIORITIES

- Protect STRS Ohio from mandatory participation in Social Security.
- Work with STRS Ohio to reduce health care premiums.
- Work to improve the retired teacher ratio on the STRS Ohio Board.
- Protect STRS Ohio from legislation that would permit alternative retirement plans not under STRS Ohio auspices.
- Work to maintain the present levels of member and employer contributions to STRS Ohio.
- Work to maintain the present age and years of service requirements for full retirement benefits.
- Support legislation to provide Medicare improvements.

SUPPORT ITEMS

- Support improvement of the health care package, including prescription drugs, for beneficiaries and dependents.
- Support legislative action that will give income tax exemption for public retirement income.
- Support legislation to protect patient rights.
- Support legislation to protect STRS Ohio retirement funds from being diverted.
- Support including spouses in Medicare Part B reimbursement

RETIREMENT PLANNING COMMITTEE

GOALS:

To prepare active teachers to know and understand what is ahead in retirement, and to make them aware of the coming changes in their life styles, both financially and psychologically. To impress upon them the need to continue their professional contacts through membership in the local and state retired teacher associations.

OBJECTIVES:

1. To maximize the retirement planning period.
2. To minimize the need for counseling during the retirement period.
3. To set the climate for a socially acceptable retirement role.
4. To learn how to cope with decreased income.
5. To acquaint them with the procedures, benefits and policies of the state retirement role and the Social Security System.
6. To maximize physical, psychological and social health, using community leaders as resource persons.
7. Acquaint active teachers with the programs and benefits available to retired educators through membership in ORTA and the local chapters.

PLANNING A RETIREMENT SEMINAR:

- Obtain cooperation of the local school system and other groups that make up the local education network. The local education association, superintendents and principals can help plan a workshop.
- Arrange for a site and make other physical arrangements.
- Select topics to be presented and designate discussion leaders.
- Secure resource persons (use local persons when possible - lawyers, doctors, nurses, Social Security personnel, STRS employees to discuss benefits, and representatives of the areas of housing, health, continuing education, etc.).
- Get the very best speakers you can - those who are experts in their field.
- Stress: STRS benefits, finances, legal aspects, aging and health, retirement residence and the psychological impact of retirement. A discussion of tax problems is also helpful to new retirees.
- Use your best speaker to moderate the program - one who can inspire, encourage and motivate those in attendance.
- Select a date when the school calendar is not filled with many other “must” activities for those who might attend.

FACILITIES:

If school facilities cannot be used, investigate the possibilities of meeting rooms in banks, business centers, libraries and senior citizen centers. These facilities are usually available without cost. Possibly, retirement information could be presented in cooperation with a college as a credit or non-credit course.

LENGTH OF THE SEMINAR:

The length of the Seminar will depend upon local circumstances. It could be a one-day session, hopefully with released time for this purpose; once a week sessions covering several weeks; or scheduled in connection with regular meetings of the active teachers association.

SECURING PUBLICITY:

It is essential to properly publicize the Retirement Planning Seminar. This can be done in a number of ways by utilizing the skills of your chapter Public Relation Committee:

Putting notices in local newspapers and in school publications. Securing spot announcement on radio and television.

Seeking the permission of school officials to put brochure or notices in the teachers' mail boxes, or at least on the school bulletin boards. Designing attractive brochures.

Asking if one of your members can attend a meeting of the teachers to explain the purpose of and the details regarding the Seminar.

ENCOURAGING MEMBERSHIP IN THE LOCAL CHAPTER AND IN THE ORTA:

A Retirement Seminar is an excellent opportunity to secure new members for the local chapter and for the ORTA. At the Seminar, be sure to get the names, addresses and telephone numbers of all who attend for follow-up. After the new retirees have joined your chapter, put them to work immediately. Knowledgeable, active members will continue their memberships and will urge non-members to become associated with the chapter. Then, the following year, these individuals can help you plan the next Retirement Planning Seminar. The problems they experienced during their first year of retirement will be "fresh" in their minds and they can more easily relate to active teachers.

LET THE MEMBERS KNOW HOW MUCH TIME THEY WILL HAVE TO FILL OR KILL:

Here is the way the average person spends his time before retirement:

Work.	40 hrs	Recreation.	10 hrs
Sleep.	56 hrs	Reading, TV, Music(etc). .	10 hrs
Commuting.	10 hrs	Church.3 hrs
Family Activities	20 hrs		
Loafing.	7 hrs		
Repairs, shopping, etc.	12 hrs	TOTAL	168 hours per week

REMEMBER TO:

1. Keep permanent file of all relevant materials;
2. Pass the materials and information on to your successor; and
3. Keep the ORTA Retirement Planning Committee Chairman advised of your activities.

INFORMATIVE AND PROTECTIVE SERVICES COMMITTEE

Serving on the Informative and Protective Services Committee gives each member an opportunity to do just that - “inform and protect” - by conveying methods to chapter members through research, handling inquiries and providing specific information.

PURPOSE

To acquire, coordinate and distribute information to retired teachers for their own well being; to render a service to those needing help in solving the financial and personal problems of retirement. Also this committee helps protect members from fraud by providing them with accurate information about information and products. This protective care function is a resource function and not a social service function.

SUGGESTIONS FOR COMMITTEE STRUCTURE

Because of the number of areas to be covered, it is suggested that a committee be formed, instead of simply appointing a chairman. “A chairman does not a committee make.” The number of committee members should depend upon the size of the chapter, but should be adequate to handle the needs of the chapter. Committee members should be intensely interested, tactful, compassionate, energetic, with good local contacts, and with the determination to keep on working until a problem is solved.

SUGGESTED ACTIVITIES FOR THE COMMITTEE

- Courtesies - cards and calls in cases of illness or bereavement
- Gather local information concerning retirement housing, Medicare approved hospitals and convalescent homes, and emergency facilities.
- Give information to members through personal contacts and/or in the chapter bulletin.
- Secure information regarding sources of help for hardship cases, referring such individuals to the proper organization for help.
- Disseminate information from the ORTA Committee to chapters.
- Assist members with insurance problems (auto and medical) and with Medicare procedures.
- Become familiar with retirement benefits and the correct procedure to obtain them; for example, the Golden Buckeye Card and the Golden Age Passport for National Parks.
- Be aware of changes in Social Security and Medicare.
- Keep members advised of frauds and misrepresentation.
- Provide consumer education tips at chapter meetings, citing examples of wise ‘buy -manship.’
- Sponsor driver improvement seminars such as “55 Alive”
- Develop and ‘widowhood’ program, teaching coping with one’s own and how to help others.
- Explain Hospice programs.
- Provide information about problems peculiar to the community - the need for better police and fire protection, low-cost ambulance services and new traffic patterns.
- Provide information about Road Scholar Programs.
- Sponsor a Tax-Aide Program for the members.
- Provide information regarding credit and non-credit college courses for retirees.
- Any other activities you deem important and appropriate for retired teachers.

RELATIONSHIP TO THE COMMUNITY SERVICES COMMITTEE

There is a close relationship between this committee and the Community Services Committee. However, keep in mind that Information and Protective Services deals primarily with the INDIVIDUAL retired teachers. Overlapping of the work of these committees should not be a problem because it is the end result - what is accomplished - which is the most important consideration. The chairmen of these two committees should consult with one another before projects are started.

URGE YOUR MEMBERS TO

Guard credit cards carefully and understand the Federal Consumer Credit Card Protection Law which applies when there is unauthorized use.

Place bonds, stock certificates, property records (deeds, titles, mortgages), family papers, contracts, etc., in a safe deposit box. In Ohio, and in some other states, life insurance policies should not be placed in safe deposit boxes. When death occurs, certain legal procedures must be followed before a box may be opened, thus delaying the payment of life insurance benefits.

Have annual physical check-ups. This is one phase of preventive medicine which, through early diagnosis of an illness, may save one from something more serious. Also, this reduces the cost of health care.

Since you can't take it with you, urge everyone to make a will or trust. It should be reviewed and updated whenever circumstances change. New probate laws should be discussed with an attorney.

Investigate the cost of funerals. Determine what is meant by the 'basic price.'

PROGRAM or PROJECT SUGGESTIONS (from Yearly State Reports):

1. Use speakers available in your community, such as lawyers, police and fire chiefs, physicians, and Social Security representatives.
2. A column in newsletter and/or send article to Newsletter
3. A booth at a county fair (perhaps in conjunction with school displays)
4. Road Scholar Travel programs
5. Safety lights for homes
6. Email possibilities for members
7. Information on retirement communities and assisted living facilities
8. Blood pressure screening at meetings
9. Golden Buckeye card information
10. Information on gardening (maybe get seed packets from florist or garden store)
11. Money management
12. Diet possibilities
13. Life Line possibilities from hospitals
14. Announcements for Health Fairs in the area
15. Local superintendent of schools
16. Physical fitness programs
17. Contact the State Teachers Retirement System, 275 E. Broad St., Columbus, OH 43215 or Telephone at 1-888-227-7877 for a speaker regarding retirement benefits.
18. Invite a speaker from the Ohio Commission on Aging, 50 W. Broad St., Columbus, OH 43215. Telephone (614) 466-5500, or from your local Area Council and Aging.

BE SURE TO CHECK THE CHAPTER HANDBOOK FOR ADDITIONAL ACTIVITIES FOR THIS COMMITTEE!

Your state Information and Protective Services Committee would be glad to assist you if you need help.

These individuals are:
(update these names here)

Addresses can be found in the Directory of this handbook

REMEMBER TO...

Keep a permanent file of all relevant materials.

Pass the materials and information on to your successor.

Turn in a yearly report on the committee activities to the state office by January 15 each year.

PUBLIC RELATIONS COMMITTEE

OBJECTIVES

- To gain the cooperation of and the assistance of outside groups and individuals for chapter activities.
- To build and maintain good will for the chapter.
- To make the public aware the chapter is a dynamic, active group, doing things for others in the community.
- To reach out to non-member retired teachers within the community and to attract them to membership.

YOUR IMAGE

When a retired teacher appears in public, an image is created for the chapter. Let the public know your chapter is composed of outstanding, dedicated and hard working members involved in many community service projects. Prove to others that the image of a retired teacher sitting in a rocking chair, whiling away the time and dependent on other people is no longer valid! Wear your ORTA pin with pride. It is available from the ORTA office for \$3.50.

SHARING YOUR ACTIVITIES WITH THE NEWS MEDIA

Many chapters get excellent newspaper coverage. Try the small shopper or weekly paper if your chapter has difficulty getting news in the larger newspapers.

Radio stations are usually generous with news coverage on service projects. Some use tapes on their public service time. When you do something unusual, try for personal interviews.

It is more difficult to get television coverage, but don't give up! Contact the stations when your activity is outstanding.

Visit your newspaper offices, radio and television stations. Find out how you can secure coverage. Ask the newspapers when they want the copy and how they want it prepared. If you haven't been getting your material published in the newspaper, remember to do it their way. You know, wastebaskets in newspaper offices are bigger than they are any place else! Give the news media the information BEFORE it happens.

Personal contact is important to build rapport between your chapter and media representatives. Ask the chapter officer in charge of programs to invite a speaker from the news media. Members will learn interesting facts about the media and their representative(s) will learn of chapter activities.

After you have received good news coverage, don't forget to express your appreciation for it. Be sure to deliver your material to the proper person. Don't beg or plead for news coverage - if you have a good story, let it stand on its own merits. Be sure your stories are typewritten, double spaced. Asking for the return of photographs means extra work for the newspapers. If it is absolutely essential that a photograph be returned, be sure to include a stamped, addressed envelope. Try to limit your story to one page - that's a good rule of thumb.

THE ORTA NEWSLETTER, MONTHLY EDITION

Your chapter president may assign to your committee the responsibility of preparing material for the newsletter. Use the *ORTA 2017 COMMUNICATIONS GUIDELINES* and the News Submittal Form and send your "success stories," those involving outstanding achievements and activities of your chapter and members, to your District Director and to the Director of Publications (**Alissa Burton, publications@orta.org**) at the state office.

CHAPTER COMMUNICATIONS

A chapter newsletter gives members a written record of the meeting dates and places and information on other activities of the chapter. The chapter newsletter gives the members information on ORTA activities. Chapter newsletters are especially appreciated by those who are physically unable to attend meetings and by those out-of-state residents who pay chapter dues and want to keep in touch with activities back home. Make your newsletter easy to read with clear, uncluttered copy. When you use graphics/photos they should be clear and identified.

Some chapters also choose to have a local website, which allows for quick access to local chapter information. ORTA encourages the chapters to continue or begin a website, that ORTA can assist with if needed. Websites are great tools to reach a new demographic in your area, newly retired teachers, soon to be retired educators or other local media outlets to promote chapter activities. Social media is also a great resource to reach your current, new and potential members. Facebook is a widely used tool to promote events, activities and other opportunities within local communities. ORTA also encourages chapters to develop a social media presence, and can provide training and assistance to grow their on-line presence.

INTERNAL ACTIVITIES

Assemble a “New Member Kit” of informational materials about the chapter and the ORTA.

Develop attractive displays of informational and historical chapter materials. Display them at chapter meetings. (Also utilize advertising materials available from the state office, ie., brochures, videos.

Prepare an annual yearbook, listing a calendar of events, and a roster of the names, addresses and telephone numbers of members.

Encourage your chapter to originate special events that involve members and make news, such as contests involving photography, writing, music, etc.

EXTERNAL ACTIVITIES

Distribute membership brochures at schools.

Register with the Chamber of Commerce so non-members and community leaders will know how to contact the chapter.

Suggest that your chapter hold an awards ceremony to recognize a prominent educator, community leader, or service organization for contributions on behalf of older Americans, and publicize the event. Also, the awarding of a scholarship to a deserving student, and/or the honoring of an outstanding student, will result in excellent publicity. And, don't overlook the value of having a group of your members pictured with a legislator, particularly one who is running for reelection!

(External activities, con't)

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BEYOND THE CHAPTER

Publicly, try to get members in the news connected with retired teachers. When members are recognized in the news, try to make sure they are recognized as a retired teachers.



ORTA COMMUNICATIONS POLICY, REV. 2017

GUIDELINES FOR SUBMITTING CONTENT

All ORTA members – including the Executive Committee, committee chairs or interested members – are encouraged to submit content to share via the communications vehicles.

General guidelines include the following:

- Please be sure to attribute information to ensure ORTA is following all copyright and permissions guidelines.
- The Publications and Communications Coordinator will receive all communications with members. ORTA encourages members to submit news on behalf of their chapters.
- All submissions should use the ORTA Submittal Form to ensure the staff has all relevant information and can easily copy and paste information, saving valuable time.
- Information should be succinct as much as possible to describe the event or information that is relevant to members. Include links to any additional resources of interest (e.g. link to original publication of information, resource to find more background, etc.).
 - Calendar submissions should include date, time, location and a one-sentence description of the event.
 - Social media content should be no longer than a paragraph and include a photo or relevant link when possible. “Tweets” on Twitter are limited to 140 characters.
- Any photos or images should be submitted as a jpg and attached via email. Please include in the email, who is in the picture and a brief caption.
 - If sent by mail, a high resolution printed photo should be included.
- Upon completion, the ORTA Submittal Form should be sent to via email to publications@orta.org.
- Information may also be sent via mail to Alissa Burton at the ORTA office, 8050 N. High St., Suite 190, Columbus, Ohio 43235.
- ORTA reserves the right to edit any material submitted due to size constraints, factual errors, grammar issues, formatting challenges, etc.
- Submissions will be posted as soon as possible, but may take up to a week.



OHIO RETIRED TEACHERS ASSOCIATION

2020 NEW MEMBERSHIP FORM

Online application is also available at www.orta.org
Please Print

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

County: _____

Primary Email Address: _____

Year or Date of Birth: _____

Date of Retirement: _____

Type of Membership: **A NEW membership is \$40. Your membership is then valid for an entire year from your joining date. This new membership includes a one-time \$10 contribution to your local chapter. Your next payment will be due at the same time next year in the amount of \$30, with no chapter contribution. All ORTA members are eligible to sign-up for benefits with our partner, AMBA.**

New Membership - \$40

Life Membership - \$500

Life Membership Payment Options (Please select one):

Onetime payment of \$500

Two \$250 payments due 6 months apart

Four \$125 payments due 2 months apart

Method of Payment (please select one):

Check or Money Order (please make payable to: ORTA)

Credit Card

VISA MasterCard Discover American Express

Card Number: _____ Expiration Date: _____

Cardholder Name: _____

Signature: _____

Each county in Ohio has a Local Chapter of retired teachers. If you would like more information on the Chapter in your area, please check the box

Note: Membership dues are NOT deductible as charitable contributions.
Please send Membership form along with payment to:
ORTA | 250 E. Wilson Bridge Rd. | Suite 150 | Worthington, Ohio 43085



OHIO RETIRED TEACHERS ASSOCIATION
2020 RENEWAL MEMBERSHIP FORM

Online application is also available at www.orta.org
Please Print

Name: _____

Address: _____

City: _____ State: _____ Zip: _____ County: _____

Primary Email Address: _____

Primary Phone Number: (____) ____ - _____

Year or Date of Birth: _____

Date of Retirement: _____

A **RENEWAL** membership is \$30. Your membership is then valid for an entire year from your payment date. Your next payment will be due at the same time next year in the amount of \$30. All renewing and new ORTA members are eligible to sign-up for benefits with our partner, AMBA.

- Renewal Membership - \$30
- Life Membership - \$500 Life Membership Payment Options (Please select one):
 - Onetime payment of \$500
 - Two \$250 payments due 6 months apart
 - Four \$125 payments due 2 months apart Method of Payment (please select one):
 - Check or Money Order (please make payable to: ORTA)
 - Credit Card
 - VISA MasterCard Discover American Express

Card Number: _____

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Signature: _____

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APPLICATION FOR ORTA OFFICER

APPLYING FOR:

- ORTA PRESIDENT ELECT
- REGIONAL LIAISON
- ORTA COMMITTEE OFFICER

NAME: (MR., MRS., MISS., MS., DR.)	DATE SUBMITTED	
STREET ADDRESS	BOX #, UNIT # OR APT. #	
CITY	COUNTY	ZIP
TELEPHONE	PRIMARY E-MAIL ADDRESS	DATE RETIRED

EDUCATION (COLLEGE, TRAINING, ETC)	DATES ATTENDED	DEGREE(S)

TEACHING EXPERIENCE (DISTRICTS, POSITION, ETC.)	DATES ATTENDED	POSITION

ORTA CHAPTER EXPERIENCE (OFFICE, POSITION)	DATES ATTENDED

SIGNED: _____ DATE: _____



2020 CHAPTER OFFICERS AND COMMITTEE CHAIRPERSONS

PLEASE RETURN BY **JANUARY 15, 2020**

***PLEASE NOTE:** IF THERE ARE ANY VACANCIES ON YOUR BOARD OR COMMITTEES, PLEASE INDICATE AS “VACANT”. IF THERE IS ANY CHANGE TO THE VACANCY AT A LATER DATE, PLEASE REACH OUT TO OUR OFFICE TO UPDATE THIS FILE.

THANK YOU.

COUNTY/CHAPTER: _____

YOUR NAME & CHAPTER POSITION TITLE: _____

CHAPTER PRESIDENT: _____

CONTACT INFORMATION (ADDRESS, PHONE, EMAIL) _____

CHAPTER VICE PRESIDENT: _____

CONTACT INFORMATION (ADDRESS, PHONE, EMAIL) _____

CHAPTER SECRETARY: _____

CONTACT INFORMATION (ADDRESS, PHONE, EMAIL) _____