Appendix A: NEA-RETIRED BYLAWS

ARTICLE I - PURPOSE
The NEA-Retired, an organization of the National Education Association, shall advance and promote the NEA programs for Retired members and Pre-retired Subscribers.

ARTICLE II - GOVERNING AUTHORITY
The NEA-Retired shall be governed by these Bylaws and such other policies as the NEA Representative Assembly and Board of Directors may establish.

ARTICLE III - OBJECTIVES
The NEA-Retired shall:
A. provide opportunity for NEA members to continue their membership and involvement in the NEA following retirement from active educational employment;
B. provide opportunity for educational employees not previously NEA members to become involved in the NEA following retirement from active educational employment;
C. enroll members of the NEA and its affiliates as Pre-retired Subscribers and provide opportunities for their involvement in certain NEA-sponsored programs;
D. establish opportunities for NEA-Retired members to address and pursue issues of common concern, create avenues to safeguard and strengthen retirement benefits, and provide forums for information sharing and social interaction;
E. create ways and means for NEA-Retired members to join with the NEA in efforts to bring about positive support for public education and the achievement of NEA objectives;
F. become involved in the election of pro-education candidates to public office and lobby for educational measures in conjunction with policy decisions made by the NEA and its affiliates;
G. assist the NEA in the improvement of instruction, and the advancement of the image of teaching in America.

*Adopted by the NEA Board of Directors, December, 1983; Amended: May, 1987; May, 1989; February, 1991; October, 1996; June, 1998; May 2007
ARTICLE IV - NEA-RETIRED MEMBERSHIP

Section 1. Eligibility

The NEA-Retired shall be comprised solely of the retired members of the NEA. Pursuant to NEA Bylaw 2-1(d) Retired membership in NEA is open to any person who is at least forty-five (45) years of age or who is eligible to receive a pension from an educational employment retirement system (including Social Security), and who was employed for at least five (5) years in a position that qualified him or her for Active membership but who is no longer so employed or who retired and returns to either day-to-day or regular full time or part time educational employment as part of an early retirement agreement with the local school district. Retired membership is limited to persons who support the purposes and programs of the Association. Retired members shall maintain membership in the state affiliate provided the affiliate has a membership category for retired members and provided the affiliate grants such members at least the right to serve as delegates to its delegate assembly or equivalent body and to be counted toward the representation entitlement of such body.

Section 2. Rights and Responsibilities

A. NEA-Retired members shall have the right to vote, to hold elective or appointive positions in the NEA-Retired and the NEA, and to be counted toward representation entitlement for the NEA Board of Directors and the NEA Representative Assembly as provided in the NEA Constitution and Bylaws.

B. NEA-Retired members shall be eligible to receive benefits and services of the NEA authorized by the NEA Board of Directors.

ARTICLE V - PRE-RETIRED SUBSCRIBERS

Section 1. Eligibility

Members of the NEA shall be eligible to become Pre-retired Subscribers.

Section 2. Rights and Responsibilities

Pre-retired Subscribers shall be eligible to receive benefits and services of the NEA as authorized by the NEA Board of Directors.

ARTICLE VI - DUES AND FINANCES

Section 1. Dues

Dues of Retired members of the NEA shall constitute the dues for membership in the NEA-Retired. They shall be established by the NEA Board of Directors and payable (a) by a retired individual who joins the NEA on an annual basis or (b) through a Retired Membership for Life Program. The dues of Pre-retired Subscribers shall be established by the NEA Board of Directors and payable through the Retired Membership for Life Program.
ARTICLE VI - DUES AND FINANCES (Continued)

Section 2.  *Lifetime Dues*
Lifetime dues receipts shall be deposited in a special purpose interest-bearing account.

Section 3.  *Income*
Income for NEA-Retired programs shall be derived from annual dues and the interest from the lifetime account.

ARTICLE VII - NEA-RETIRED EXECUTIVE OFFICERS

Section 1.  *Executive Officers*
The NEA-Retired Executive Officers shall include the President, Vice President, and Secretary.

Section 2.  *President*
A.  **Election.**  The President of the NEA-Retired shall be elected at the NEA-Retired Annual Meeting for a three-year term of office through an open nomination and secret ballot election.  Members of the NEA-Retired shall be eligible to be candidates.  Voting shall be restricted to the Retired delegates to the NEA Representative Assembly.

B.  **Duties.**  The President of the NEA-Retired shall chair all meetings of the NEA-Retired Advisory Council and shall be responsible for the preparation of the agendas.  He/she shall chair the NEA-Retired Annual Meeting and be responsible for preparation of the agenda with the advice and consent of the NEA-Retired Advisory Council.

C.  **Vacancy.**  A vacancy in the office of President shall be filled by the Vice President only until the next NEA-Retired Annual Meeting, at which time a duly called election shall be held in order to fill the unexpired term of office.

Section 3.  *Vice President*
A.  **Election.**  The Vice President of the NEA-Retired shall be elected at the NEA-Retired Annual Meeting for a three-year term of office through an open nomination and secret ballot election.  Members of the NEA-Retired shall be eligible to be candidates.  Voting shall be restricted to Retired delegates to the NEA Representative Assembly.

B.  **Duties.**  The Vice President shall chair all meetings of the NEA-Retired Advisory Council and the NEA-Retired Annual Meeting in the absence of the President.  He/she shall assist the President in representing member interests and in carrying out such duties as the President may delegate.

C.  **Vacancy.**  The NEA-Retired Advisory Council shall be authorized to fill a vacancy in the office of Vice President only until the next NEA-Retired Annual Meeting, at which time a duly called election shall be held in order to fill the unexpired term of office.
ARTICLE VII - NEA-RETIRED EXECUTIVE OFFICERS (Continued)

Section 4. Secretary

A. Election. The Secretary of the NEA-Retired shall be elected at the NEA-Retired Annual Meeting for a three-year term of office through an open nomination and secret ballot election. Members of the NEA-Retired shall be eligible to be candidates. Voting shall be restricted to the Retired delegates to the NEA Representative Assembly.

B. Duties. The Secretary shall be responsible for keeping the minutes of all meetings of the NEA-Retired Advisory Council and the NEA-Retired Annual Meeting. He/she shall present for adoption at the subsequent meeting of each of these two governing bodies, the respective minutes of the previous meeting. He/she shall also be responsible for maintaining the historical records of the organization.

C. Vacancy. A vacancy in the office of Secretary shall be filled at the next NEA-Retired Annual Meeting, at which time a duly called election shall be held in order to fill the unexpired term of office. Until such election is held, the President of the NEA-Retired shall appoint an interim secretary to fulfill the duties of the office of secretary.

ARTICLE VIII - NEA-RETIRED ADVISORY COUNCIL

Section 1. Composition and Election.

The NEA-Retired Advisory Council shall be comprised of the President, Vice President and Secretary of the NEA-Retired, and six members of the NEA-Retired elected at the NEA-Retired Annual Meeting, for three-year staggered terms, through an open nomination and secret ballot election. Following the election of officers and Advisory Council members at the NEA-Retired Annual Meeting, if the total membership of the NEA-Retired Advisory Council does not include at least one member of an ethnic-minority group, an ethnic-minority member shall be elected to the Council in accordance with the provisions of Article XII, Section 4, of these Bylaws. The election shall be conducted with open nominations and a secret ballot. The term of the ethnic-minority member shall be one year.

Section 2. Terms of Office

NEA-Retired Officer and Advisory Council members shall serve no more than two terms in the position to which elected.

Section 3. Function

The NEA-Retired Advisory Council shall provide leadership in carrying out the objectives of the organization and shall advise the NEA in the operation of the NEA-Retired program.
ARTICLE VIII - NEA-RETIRED ADVISORY COUNCIL (Continued)

Section 4.  Meetings
The NEA-Retired Advisory Council shall meet at least three times each year at times and locations to be determined by the NEA-Retired President. A majority of members shall constitute a quorum. Minutes of each meeting shall be recorded and duly adopted.

Section 5.  Vacancies
The NEA-Retired Advisory Council shall be authorized to fill vacancies in its body only until the next NEA-Retired Annual Meeting, at which time a duly called election shall be held in order to fill the unexpired term of office.

ARTICLE IX - REPRESENTATION ON THE NEA BOARD OF DIRECTORS

Section 1.  Representation
Members of the NEA-Retired shall have representation as provided in the NEA Constitution and Bylaws.

Section 2.  Number of Directors
The number of Retired directors on the NEA Board of Directors shall be determined as provided in the NEA Constitution and Bylaws.

Section 3.  Eligibility
Only NEA-Retired members shall be eligible to serve on the NEA Board of Directors.

Section 4.  Election
Directors shall be elected at the NEA-Retired Annual Meeting consistent with the NEA requirements for three-year staggered terms. Nomination for office shall be open and election shall be by secret ballot. Each Retired delegate to the NEA Representative Assembly in attendance shall be entitled to vote.

Section 5.  Vacancy
The NEA-Retired Advisory Council shall recommend an individual to fill a Director’s vacancy. The vacancy shall be filled by the NEA Board of Directors when in session or when not in session by the NEA Executive Committee. The individual appointed shall serve until the next NEA-Retired Annual Meeting, at which time a duly called election shall be held in order to fill the unexpired term of office.
ARTICLE X- REPRESENTATION TO THE NEA REPRESENTATIVE ASSEMBLY

Section 1. Representation
Members of the NEA-Retired shall be represented at the NEA Representative Assembly by the Retired delegates to the NEA Representative Assembly.

Section 2. Number of Delegates
The number of Retired delegates to the NEA Representative Assembly shall be determined as provided in the NEA Bylaws.

Section 3. Eligibility
Only NEA-Retired members shall be eligible for delegate positions to the NEA Representative Assembly.

Section 4. Election
Based upon the number of Retired delegate positions allocated by the NEA to the several states, each NEA state affiliate shall carry responsibility to ensure that the election of Retired delegates is conducted in accordance with the NEA requirements. Only Retired members of the NEA shall be eligible to vote.

ARTICLE XI - REPRESENTATION ON THE NEA RESOLUTIONS COMMITTEE

Section 1. Representation
Members of the NEA-Retired shall have representation as provided in the NEA Standing Rules.

Section 2. Number of Members
The number of NEA-Retired members on the NEA Resolutions Committee shall be determined as provided in the NEA Standing Rules.

Section 3. Eligibility
Only Retired delegates to the NEA Representative Assembly shall be eligible to be elected to the NEA Resolutions Committee.

Section 4. Election
Resolutions Committee members shall be elected at the NEA-Retired Annual Meeting consistent with the NEA Standing Rules. Nominations shall be open and election shall be by secret ballot. Each Retired delegate to the NEA Representative Assembly in attendance shall be entitled to vote.
ARTICLE XI - REPRESENTATION ON THE NEA RESOLUTIONS COMMITTEE (Continued)

Section 5. Alternates
Alternates in equal number to committee members shall be elected at the NEA-Retired Annual Meeting. Should the number of alternates be fewer than the number needed to fill Retired member vacancies on the Committee, additional alternates shall be appointed by the NEA-Retired Advisory Council.

ARTICLE XII - NEA-RETIRED ANNUAL MEETING

Section 1. Agenda
Authority of the President of the NEA-Retired. The agenda for the NEA-Retired Annual Meeting shall be prepared by the President of the NEA-Retired with the advice and consent of the NEA-Retired Advisory Council. The President of the NEA-Retired shall chair the NEA-Retired Annual Meeting.

Section 2. City and Date
The NEA-Retired Annual Meeting shall be held immediately prior to and in the same convention city as the NEA Representative Assembly.

Section 3. Attendance
All NEA-Retired members shall be invited to attend and participate in the proceedings of the NEA-Retired Annual Meeting as described in Article XI, Section 4. Notification of the site and date shall be made at least six months prior to each meeting.

Section 4. Voting
Any NEA-Retired member registered at the NEA-Retired Annual Meeting shall be entitled to full voting rights at the NEA-Retired Annual Meeting, with the exception that the right to vote in elections for the NEA Directors, NEA Resolutions Committee, the President, Vice President, and Secretary of the NEA-Retired and the six members of the NEA-Retired Advisory Council shall be limited to Retired delegates to the NEA Representative Assembly.

Pre-retired subscribers will be treated as observers without the right to vote but may otherwise participate in the proceedings according to Robert’s Rules of Order Revised.

ARTICLE XIII - AMENDMENTS
A simple majority vote of the NEA Board of Directors shall be required to approve an amendment to the NEA-Retired Bylaws. An amendment to the NEA-Retired Bylaws may be submitted by the NEA-Retired Advisory Council or by a member of the NEA Board of Directors. Unless otherwise provided, an amendment shall take effect at the beginning of the fiscal year following its adoption.
MEMO

TO:   Dorothy Harrell
FROM: John Wilson
DATE: July 31, 2007
RE:   Amendment to Article IV of the NEA-Retired Bylaws

At its meeting of June 29, 2007, the Board of Directors approved an amendment to the NEA-Retired bylaws to clarify eligibility requirements for membership in NEA-Retired by adding language that persons who have retired and returned to either day-to-day or regular full-time or part-time employment as part of an early retirement agreement with a local school district are eligible to be NEA-R members. The new language also requires that members support the purposes and programs of the Association and maintain membership in the state affiliate retired program – as long as one is available – and the affiliate grants such members the right to serve as delegates to its delegate assembly and be counted for representation entitlement.

Cc   Gary Timmons
MEMO

TO: Dorothy Harrell

FROM: John Wilson

DATE: July 31, 2007

RE: Amendment to Article VIII of the NEA-Retired Bylaws

At its meeting of June 29, 2007, the Board of Directors approved an amendment to the NEA-Retired bylaws making minor, clarifying changes to language regarding the two-term limit for NEA-Retired officers and Advisory Council members and allows the NEA-Retired Advisory Council to meet more than three times a year.

ccc Gary Timmons
MEMO

FROM: Martha Karlovetz, Chair NEA-Retired Ad Hoc Bylaws Committee

TO: NEA-Retired Advisory Council
    NEA-Retired Directors on the NEA Board
    NEA-Retired Resolutions Committee Members
    NEA-Retired Ad Hoc Bylaws Committee
    State-Retired State Presidents

CC: Reg Weaver, Dennis Van Roekel, Dorothy Harrell, Malcolm Staples,
    Gary Timmons, NEA Staff Liaison, Retired Ad Hoc Bylaws Committee,
    Todd Crenshaw and Candace Lilyquist

DATE: February 15, 2008

RE: NEA and NEA-Retired Proposed Bylaws Changes

As most of you are aware, the NEA Executive Committee and the NEA Board of Directors have approved the recommendation of the NEA-Retired Ad Hoc Bylaws Committee and the NEA-Retired Advisory Council to amend the NEA Bylaws to give NEA-Retired authority to amend its own bylaws. With these approvals, the March 3 deadline for submitting amendments to the NEA Bylaws was met.

The proposed changes to the NEA and NEA-Retired Bylaws will be an information/discussion item during the State-Retired Presidents’ meetings at both the Eastern and Western Regional Conferences. The purpose of this memo is to give all of you the proposed wording in advance of these conferences – see attached.

The changes to NEA Bylaws 8-6 and 8-14 will be presented to the 2008 NEA Representative Assembly.

The changes to NEA-Retired Bylaws Article II and Article III will be on the May 2008 NEA Board of Directors’ agenda. Approval would be contingent on passage of the amendments to the NEA Bylaws at the 2008 RA.

The changes to NEA-Retired Bylaws regarding elections procedures will be on the May 2008 NEA Board of Directors’ agenda but do not need to be contingent on the adoption of the changes to the NEA Bylaws.
<table>
<thead>
<tr>
<th>Membership Type (2007-2008)</th>
<th>Code</th>
<th>Dues Amount</th>
<th><strong>Proposed Increase</strong></th>
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<tbody>
<tr>
<td>Active Professional Full-time</td>
<td>AC-1-100</td>
<td>$151.00</td>
<td>$153.00</td>
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<tr>
<td>Active Professional 26%-50%</td>
<td>AC-1-50</td>
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<td>Active Professional 25% or less</td>
<td>AC-1-25</td>
<td>$44.00</td>
<td>$46.00</td>
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<td>Active Professional Substitute</td>
<td>AC-1-1</td>
<td>$44.00</td>
<td>$46.00</td>
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<td>Active Education Support Professional (ESP) Full-time</td>
<td>AC-2-100</td>
<td>$85.50</td>
<td>$87.50</td>
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<td>Active Education Support Professional 26%-50%</td>
<td>AC-2-50</td>
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<td>$49.00</td>
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<td>Active Education Support Professional 25% or less</td>
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<td>$29.75</td>
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<td>Active Education Support Professional Substitute</td>
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<td>Reserve (former Active Professional)</td>
<td>RS-1-0</td>
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<td>Reserve (former Active Education Support Professional)</td>
<td>RS-2-0</td>
<td>$39.00</td>
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<td>Substitute (substitutes who are not included in a bargaining unit with full-time educational employees) *</td>
<td>SB-0-0</td>
<td>$15.00</td>
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<td>Staff</td>
<td>SF-0-0</td>
<td>$71.50</td>
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<tr>
<td>Student</td>
<td>ST-0-0</td>
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<td>Retired Annual (retired prior to 9/1/73)</td>
<td>RT-8-6</td>
<td>$5.00</td>
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<td>Retired Annual (retired on or after 9/1/73)</td>
<td>RT-8-0</td>
<td>$25.00</td>
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<td>Retired Life</td>
<td>RT-7-7</td>
<td>$200.00</td>
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<td>Per member cost for publications:</td>
<td></td>
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<td>NEA Today</td>
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<td>$4.90</td>
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<td>Higher Education publications</td>
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<td>$19.25</td>
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<tr>
<td>This Active Life (Retired publication)</td>
<td></td>
<td>$2.85</td>
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<tr>
<td>Tomorrow’s Teacher (Student publication)</td>
<td></td>
<td>$2.85</td>
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</table>

The average annual salary of classroom teachers in the public elementary and secondary schools for 2006-07 is estimated to be $50,521 by NEA Research. The average annual salary of education support professionals for 2006-07 is estimated to be $27,600 by NEA Research.

* The option to join the Association as a Substitute member is available only to an educational employee who is employed in a state in which the state affiliate has a substitute membership category and who maintains membership in the state affiliate’s substitute membership category. (Bylaw 2-1e.)
## Appendix B - 2008-2009 State Affiliate Information

<table>
<thead>
<tr>
<th>State</th>
<th>ANNUAL</th>
<th>LIFETIME</th>
<th>COMMENTS</th>
<th>WEBSITE</th>
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<tr>
<td>ALABAMA</td>
<td>$137.00*</td>
<td>No Lifetime</td>
<td>*Includes unified dues of $35 for AEA, $35 for AERA, $25 NEA Retired, plus $36 state PAC and $6 for NEA Fund for Children.</td>
<td><a href="http://www.myaea.org">www.myaea.org</a></td>
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<tr>
<td>ALASKA</td>
<td>$30.00</td>
<td>$200.00</td>
<td>No new Annual members will be accepted after 9/1/06. We no longer offer payroll deduction for life membership.</td>
<td><a href="http://www.ak.nea.org">www.ak.nea.org</a></td>
</tr>
<tr>
<td>ARIZONA</td>
<td>$50.00*</td>
<td>No Lifetime</td>
<td>Include $25 for AEA Retired and $25 for AEA dues. Dues may be deducted from monthly Retirement Benefit checks. Free Annual membership to members age 90 and over.</td>
<td><a href="http://www.arizonaea.org">www.arizonaea.org</a></td>
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<tr>
<td>ARKANSAS</td>
<td>$5.00/15.00*</td>
<td>$200.00</td>
<td>*$5.00 for Retired members who joined before 9/1/91. Arkansas has a pre-retired category available for active members. The dues are the same as the AEA/NEA-Retired Life dues.</td>
<td><a href="http://www.aeaonline.org">www.aeaonline.org</a></td>
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<tr>
<td>CALIFORNIA</td>
<td>$17.00</td>
<td>$120.00</td>
<td>CTA/NEA-Retired has a pre-retired subscriber option where an active member may join by paying $120 CTA-Retired Lifetime Dues &amp; $200 NEA-Retired Lifetime Dues amount.</td>
<td><a href="http://www.lcta.org">www.lcta.org</a></td>
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<tr>
<td>COLORADO</td>
<td>$10.00</td>
<td>$125.00</td>
<td>Active members may join as Pre-Retired by paying in 1 lump sum or in 3 payments.</td>
<td><a href="http://www.coloradoea.org">www.coloradoea.org</a></td>
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<tr>
<td>CONNECTICUT</td>
<td>$18.00</td>
<td>229.00</td>
<td>Unified 91-92. Lifetime dues = 1/2 Active dues.</td>
<td><a href="http://www.cea.org">www.cea.org</a></td>
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<td>DELAWARE</td>
<td>$8.00*/26.00</td>
<td>$260.00</td>
<td>*Prior to 9/1/73</td>
<td><a href="http://www.dsea.org">www.dsea.org</a></td>
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<td>FLORIDA</td>
<td>$36.00</td>
<td>$300.00</td>
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<td><a href="http://www.feaweb.org">www.feaweb.org</a></td>
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<tr>
<td>State</td>
<td>Annual</td>
<td>Lifetime</td>
<td>Comments</td>
<td>Website</td>
</tr>
<tr>
<td>------------------</td>
<td>--------</td>
<td>----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>GEORGIA (Unified)</td>
<td>$10.00</td>
<td>$100.00</td>
<td>Pre-Retired subscriptions are available for $100 for the state and $200 for the national portion as of 9-1-06.</td>
<td><a href="http://www.gae.org">www.gae.org</a></td>
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<tr>
<td>HAWAII (Unified) 1995</td>
<td>$35.00/$60.00</td>
<td>No Lifetime</td>
<td>$35 for NEA-Retired Life members and $60 for non NEA-Retired Life members. Dues may be deducted from their pension checks.</td>
<td><a href="http://www.hsta.org">www.hsta.org</a></td>
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<tr>
<td>IDAHO (Unified) 1977</td>
<td>$10.00</td>
<td>$100.00</td>
<td>Active members may join as Pre-retired paying $100 state dues.</td>
<td><a href="http://www.idahoea.org">www.idahoea.org</a></td>
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<td>ILLINOIS (Unified) 1986</td>
<td>$5.00</td>
<td>$50.00</td>
<td></td>
<td><a href="http://www.ieanea.org">www.ieanea.org</a></td>
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<tr>
<td>INDIANA (Unified) 1992</td>
<td>$30.00</td>
<td>$300.00</td>
<td>Retired and Pre-Retired Lifetime membership may be purchased in a one-time payment or by using the ten-month coupon program called Easy Payment Plan.</td>
<td><a href="http://www.ista-in.org">www.ista-in.org</a></td>
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<tr>
<td>IOWA (Unified) 1988</td>
<td>$46.00*</td>
<td>$403.00**</td>
<td>*Includes a voluntary $15 contribution to ISEA PAC. **Includes a $15 voluntary contribution to ISEA PAC.</td>
<td><a href="http://www.isa.org">www.isa.org</a></td>
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<tr>
<td>KANSAS (Unified) 1987</td>
<td>$5.00/15.00*</td>
<td>$150.00</td>
<td>*$5.00 prior to 9/73; $15.00 after 9/73: Membership is “FREE for those over 90 years of age”</td>
<td><a href="http://www.knea.org">www.knea.org</a></td>
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<td>KENTUCKY (Unified) 1993</td>
<td>$25.00/5.00*</td>
<td>$250.00</td>
<td>*$5.00 prior to 9/73. Now that KEA has continuous membership, retired lifetime dues are considered to be paid in full for an active member upon retirement.</td>
<td><a href="http://www.kea.org">www.kea.org</a></td>
</tr>
<tr>
<td>LOUISIANA (Unified) 1990-95</td>
<td>$36.00</td>
<td>$100.00*</td>
<td>*Limited to 1,000 members. This the the first year we have a functioning LAE-Retired Statewide Local. Local dues are $25.</td>
<td><a href="http://www.lae.org">www.lae.org</a></td>
</tr>
<tr>
<td>MAINE (Unified) 1986</td>
<td>$21.00*</td>
<td>No Lifetime</td>
<td>We are now MEA-Retired (MEA-R). $9.00 of the $21.00 goes to the State Active org. and $12 stay with the State Retired org.</td>
<td><a href="http://www.maine.nea.org">www.maine.nea.org</a></td>
</tr>
<tr>
<td>State</td>
<td>Annual (Unif.)</td>
<td>Lifetime (Unif.)</td>
<td>Comments</td>
<td>Website</td>
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<td>--------------------------------------------------------------------------</td>
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<tr>
<td>MARYLAND</td>
<td>$22.00</td>
<td>$276.00</td>
<td>Pre-Retired memberships are now available for $237.00</td>
<td><a href="http://www.mstanea.org">www.mstanea.org</a></td>
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<tr>
<td>MASSACHUSETTS</td>
<td>$30.00</td>
<td>$345.00</td>
<td>Also, MTA-Retired membership dues for age 80+ are $0.</td>
<td><a href="http://www.masstteacher.org">www.masstteacher.org</a></td>
</tr>
<tr>
<td>MICHIGAN</td>
<td>No Annual</td>
<td>$200.00</td>
<td>Pre-Retired memberships are available through payroll deduction.</td>
<td><a href="http://www.mea.org">www.mea.org</a></td>
</tr>
<tr>
<td>MINNESOTA</td>
<td>No Annual</td>
<td>$300.00*</td>
<td>*Preretired - includes $100 state and $200 national dues.</td>
<td><a href="http://www.educationminnesota.org">www.educationminnesota.org</a></td>
</tr>
<tr>
<td>MISSISSIPPI</td>
<td>$35.00*</td>
<td>$198.00**</td>
<td>**Retired - includes $150 state and $200 national dues.</td>
<td><a href="http://www.ms.nea.org">www.ms.nea.org</a></td>
</tr>
<tr>
<td>MISSOURI</td>
<td>$30.00</td>
<td>$150.00</td>
<td>*Includes $35 for MAE Retired and $25 NEA-Retired dues.</td>
<td><a href="http://www.mnea.org">www.mnea.org</a></td>
</tr>
<tr>
<td>MONTANA</td>
<td>No Annual</td>
<td>$400.00*</td>
<td>*Includes $200 for state Life or Pre-retired dues and $200 NEA Retired dues. Payments made in one lump sum. MEA-MFT does not offer Annual memberships, nor assess local retired dues.</td>
<td><a href="http://www.mea-mft.org">www.mea-mft.org</a></td>
</tr>
<tr>
<td>NEBRASKA</td>
<td>$25.00</td>
<td>$200.00</td>
<td>Pre-Retired memberships are available through a pre-payment plan.</td>
<td><a href="http://www.nsea.org">www.nsea.org</a></td>
</tr>
<tr>
<td>NEVADA</td>
<td>$50.00</td>
<td>$220.00*</td>
<td>*Lifetime and Pre-Retired memberships are available through pre-payment plan of $35 down and eleven monthly payments of $35</td>
<td><a href="http://www.nsca-nv.org">www.nsca-nv.org</a></td>
</tr>
<tr>
<td>NEW HAMPSHIRE</td>
<td>$10.00</td>
<td>$50.00.00</td>
<td>Pre-retired membership is also available for $50.</td>
<td><a href="http://www.neanh.org">www.neanh.org</a></td>
</tr>
<tr>
<td>NEW JERSEY</td>
<td>$44.00 - Prof</td>
<td>$660.00 – Prof</td>
<td>Pre-Retired Memberships are available on a three month payment plan or in a lump sum payment. Credit cards are accepted.</td>
<td><a href="http://www.njea.org">www.njea.org</a></td>
</tr>
<tr>
<td>NEW MEXICO</td>
<td>$25.00</td>
<td>$200.00</td>
<td>Pre-Retired memberships can be purchased using payroll deduction.</td>
<td><a href="http://www.nea-nm.org">www.nea-nm.org</a></td>
</tr>
<tr>
<td>NEW YORK</td>
<td>No Annual *</td>
<td>$100.00</td>
<td>* Annual no longer offered; Past Annual members will continue paying annual dues @ $54.50 per year.</td>
<td><a href="http://www.nysut.org">www.nysut.org</a></td>
</tr>
</tbody>
</table>

Pre-Retired memberships are now available for $237.00. Also, MTA-Retired membership dues for age 80+ are $0. Pre-Retired memberships are available through payroll deduction. *Preretired - includes $100 state and $200 national dues. **Retired - includes $150 state and $200 national dues. *Includes $35 for MAE Retired and $25 NEA-Retired dues. *Includes $200 for state Life or Pre-retired dues and $200 NEA Retired dues. Payments made in one lump sum. MEA-MFT does not offer Annual memberships, nor assess local retired dues. *Annual no longer offered; Past Annual members will continue paying annual dues @ $54.50 per year. Pre-Retired memberships are available through a pre-payment plan. *Lifetime and Pre-Retired memberships are available through pre-payment plan of $35 down and eleven monthly payments of $35. Credit cards are accepted. Pre-Retired memberships can be purchased using payroll deduction. Membership Organizing & Resource Handbook

Appendices 14
<table>
<thead>
<tr>
<th>State</th>
<th>Annual</th>
<th>Lifetime</th>
<th>Comments</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH CAROLINA (Unif.) 85</td>
<td>$81.00</td>
<td>No State Lifetime</td>
<td>For new retirees on payroll deduction (includes $34 state active, $30 state retired, $7 district, and $10 local).</td>
<td><a href="http://www.ncae.org">www.ncae.org</a></td>
</tr>
<tr>
<td>NORTH DAKOTA (Unified)</td>
<td>$12.00</td>
<td>$111.00</td>
<td>Pre-Retired Memberships are available through a 10 months automatic dues deduction or in a lump sum payment.</td>
<td><a href="http://www.ndea.org">www.ndea.org</a></td>
</tr>
<tr>
<td>OHIO (Unified) 1973</td>
<td>$15.00</td>
<td>$100.00</td>
<td>Pre-Retired memberships are available for $300 for OEA/NEA-Retired unified dues. Payment can be made in a lump sum.</td>
<td><a href="http://www.ohea.org">www.ohea.org</a></td>
</tr>
<tr>
<td>OKLAHOMA (unified) 2003</td>
<td>$36.00</td>
<td>No longer available</td>
<td>State Retired dues may be payroll deducted.</td>
<td><a href="http://www.okea.org">www.okea.org</a></td>
</tr>
<tr>
<td>OREGON (Unified)</td>
<td>$15.00</td>
<td>$250</td>
<td>Pre-Retired memberships are available 1 year before retirement at $225. If purchased 2 or more year before retirement it is $212.50</td>
<td><a href="http://www.oregoned.org">www.oregoned.org</a></td>
</tr>
<tr>
<td>PENNSYLVANIA (Unif.) 1988</td>
<td>$20.00</td>
<td>$293.00</td>
<td>Pre-Retired life memberships are available. For local annual dues add $5 and $50 for local lifetime dues. PSEA-Retired is unified at the local, state, and national levels.</td>
<td><a href="http://www.psea.org">www.psea.org</a></td>
</tr>
<tr>
<td>RHODE ISLAND (Unif.) 1971</td>
<td>$34*</td>
<td>No Lifetime</td>
<td>Retired dues are 10% of NEARI Active Professional Dues.</td>
<td><a href="http://www.neari.org">www.neari.org</a></td>
</tr>
<tr>
<td>SOUTH CAROLINA (Unif.)* 86</td>
<td>$20.00</td>
<td>$200.00</td>
<td>*Retired membership is unified if retired on or after 9/1/86. Pre-retired memberships are available through an October-June bank draft or in a lump sum payment.</td>
<td><a href="http://www.thescea.org">www.thescea.org</a></td>
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<tr>
<td>SOUTH DAKOTA (Unif.) 1989</td>
<td>$15.00*</td>
<td>$100.00</td>
<td>Pre-retired memberships are $100 SDEA and $200 NEA-Retired for a total of $300. Local dues are $5 per year upon retirement.</td>
<td><a href="http://www.sdea.org">www.sdea.org</a></td>
</tr>
<tr>
<td>TENNESSEE (Unif.) 1992</td>
<td>$20.00</td>
<td>No Lifetime for TRTA</td>
<td>NEA-Retired Lifetime is encouraged for Pre-Retired and TRTA members at $200 for NEA-Retired portion.</td>
<td><a href="http://www.tnretiredteachers.org">www.tnretiredteachers.org</a></td>
</tr>
<tr>
<td>ANNUAL</td>
<td>LIFETIME</td>
<td>COMMENTS</td>
<td>WEBSITE</td>
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<tr>
<td>TEXAS</td>
<td>$5.00/15.00</td>
<td>Pre-Retired TSTA/NEA-Retired Lifetime pay a one-time fee of $350. Lifetime state dues may be payroll deducted.</td>
<td><a href="http://www.tsta.org">www.tsta.org</a></td>
<td></td>
</tr>
<tr>
<td>UTAH</td>
<td>$2.00</td>
<td>No Lifetime Dues $5.00 prior to 4/23/05, $15.00 after 4/23/05. * Retired members who join as NEA Retired-Lifetime get their Utah Retired-Lifetime membership free.</td>
<td><a href="http://www.utea.org">www.utea.org</a></td>
<td></td>
</tr>
<tr>
<td>VERMONT</td>
<td>40.00/25.00*</td>
<td>No Lifetime *$25.00 prior to 9/1/73, $40.00 after 9/1/73. Pre-Retired memberships are available for lifetime only.</td>
<td><a href="http://www.vtnea.org">www.vtnea.org</a></td>
<td></td>
</tr>
<tr>
<td>VIRGINIA</td>
<td>$33.00</td>
<td>$200.00 *$25.00 prior to 9/1/73, $40.00 after 9/1/73. Pre-Retired memberships are available for lifetime only.</td>
<td><a href="http://www.veaweteach.org">www.veaweteach.org</a></td>
<td></td>
</tr>
<tr>
<td>WASHINGTON</td>
<td>$15.00</td>
<td>$150.00 Pre-Retired is available.</td>
<td><a href="http://www.wa.nea.org">www.wa.nea.org</a></td>
<td></td>
</tr>
<tr>
<td>WEST VIRGINIA</td>
<td>$40.00</td>
<td>$100.00 Pre-retired membership is open to all active unified members who pay the lifetime state and national dues.</td>
<td><a href="http://www.wvea.org">www.wvea.org</a></td>
<td></td>
</tr>
<tr>
<td>WISCONSIN</td>
<td>No Annual</td>
<td>$175.00 Pre-Retired Enrollment is offered to all actives age 26 &amp; older (Where WEAC-Retired chapters exist, unified enrollment in the chapter, state, and national is solicited; where chapters do not exist, state and national enrollment is solicited).</td>
<td><a href="http://www.weac.org">www.weac.org</a></td>
<td></td>
</tr>
<tr>
<td>WYOMING</td>
<td>No Annual</td>
<td>$50.00 Pre-Retired is available.</td>
<td><a href="http://www.wyoea.org">www.wyoea.org</a></td>
<td></td>
</tr>
<tr>
<td>FEDERAL</td>
<td>No Annual</td>
<td>$92.25 Lifetime dues are 1/4 of FEA Active Professional dues. All Retired members must be unified.</td>
<td><a href="http://www.feaonline.org">www.feaonline.org</a></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** All NEA-Retired State Affiliates are now unified. While most states are unified at the state and national levels, there are several states where unification includes the local. For the Retired Unified Dues amount, please add the national dues amount of **$25.00 to the state Annual Dues shown here** and add national dues amount of **$200 to the state Lifetime Dues shown here**.
APPENDIX C


The NEA Representative Assembly, through adoption of the Legislative Program, sets forth the federal legislative policies that facilitate accomplishment of the strategic objectives in pursuit of the Association’s mission.

The Legislative Program portions reprinted below are those relating to the topics of retirement security, pension fund protection, health care, senior citizens, and Social Security as adopted by the 2007 Representative Assembly.

RETIREMENT SECURITY

**NEA supports**
- availability of voluntary Social Security coverage to eligible school employee groups where initiated by those groups in states in which public employees are not covered by Social Security;
- immediate and total repeal of the Social Security Offset/Government Pension Offset to reinstate equity between public and private sector employees and to restore to eligible individuals and survivors the full Social Security benefit earned by their spouses;
- immediate and total elimination of the Social Security Offset/Windfall Elimination Provision for members who have qualified for retirement or disability benefits from both Social Security and another government pension system;
- adequate federal insurance of state or local retirement and/or deferred compensation plans that are invested in institutions protected by the Federal Deposit Insurance Corporation;
- portability of pension rights and benefits through retention of retirement rights and assets;
- the right of an individual to transfer tax-sheltered savings to purchase retirement credit without adverse tax consequences;
- equitable retirement credits and/or buyback rights;
- fiduciary and reporting standards to inform members and to protect assets and earned benefits of retirement systems;
standards for vesting and portability, ownership, and military or Peace Corps service credit;

federal legislation ending discriminatory policies of residency requirements for military service credit in state retirement systems;

protection of members’ retirement income through automatic escalator clauses;

use of Section 125 plans for retired education personnel, with the respective retirement fund designated by the employer;

reinstatement of the three-year period for recovery of members’ retirement contributions.

NEA opposes

mandatory coverage of public employees under Social Security for employee groups that have declined coverage;

merger of Social Security with any other public employee pension plan;

diminution of retirement income;

supersession of substantially equivalent or superior state retirement statutes by federal standards.

PENSION FUND PROTECTION

NEA supports

public employee pension fund protection including, but not limited to, the following principal features:

◆ maintenance of accurate minutes of trustee proceedings in order that all funding transactions will be visible to participants and the government;

◆ regulation of selection of investment managers, adoption of investment objectives, and monitoring of the manager’s performance;

◆ active investment of resources so that funds are fully and productively invested at all times;

◆ requirements that investments be socially desirable and fiducially responsible;

◆ regulations covering payments to beneficiaries in the proper amount as long as the fund remains solvent;

◆ annual audit and actuarial valuation every three years;

◆ annual reports to the Department of Labor and to the members of the pension fund;
a requirement that employers fully fund all promised retirement benefits including post-retirement medical benefits;

- a prohibition of reduction of basic pension benefits, cost-of-living adjustment provisions, or post-retirement medical benefits to employees who have become vested in the plan;

- an emergency provision that all benefits of a plan that becomes insolvent through fraud or poor investments would be paid by an agency such as the Pension Benefit Guarantee Corporation (PBGC);

- the right to hire their own staff, i.e., executive directors, investment officers, and legal counsel;

- a requirement that retirement boards have at least one retired member elected to the board;

- a requirement that retirement boards be in charge of investments as well as benefits.

- federal standards to assume that the expected rate of return on pension fund investments is commensurate with the expected risks of the investment;

- eligibility of public employee pension fund representatives for appointment to creditor committees established to settle corporate Chapter 11 bankruptcies;

- public employees’ ability to make pretax contributions to 401(k) and similar pretax plans for retirement savings, in addition to existing retirement plans;

- requiring all member pension plans, except those involving higher education, to have as a basis an adequate and fully funded defined benefit plan.

**NEA opposes**

- taxation of public employee pension benefits;

- taxation of health care benefits provided to retirees.

**HEALTH CARE**

NEA supports a national health care policy that will mandate universal coverage with the highest quality health care at the lowest possible cost.

In pursuit of this goal, NEA supports

- a tax-supported, single-payer health care plan for all residents of the United States, its territories, and the Commonwealth of Puerto Rico, adoption of which shall be supported at whatever level of government is appropriate;
a national program of long-term care, including home health care for the chronically ill, including those with cognitive or mental impairments;

- containment of health care cost increases;
- coverage for full men’s and women’s reproductive health care;
- parity for mental health coverage;
- coverage for audiological services and/or devices;
- legislation to require insurance companies to cover the diagnosis and treatment of hearing loss, including hearing aids and other devices;
- a major federal commitment to HIV/AIDS and other blood borne pathogens research to develop a preventive agent, effective treatments, and a cure;
- strict federal standards for staffing, safety, health care, and nutrition services provided by nursing homes;
- strengthened occupational health and safety standards and programs with diligent enforcement;
- establishment and funding of federal research efforts devoted to health care issues specific to women’s health concerns;
- tax exemptions for health insurance and benefits;
- allowing retired state and local government employees to pay health care premiums with pretax dollars;
- tax exemption for accelerated death benefit payments for life insurance contracts;
- expansion of mental health services and the coordination of public schools on the provision of such services;
- the regulation of health maintenance organizations (HMOs), in particular health care management plans and their business practices, so that quality patient care is given top priority and doctor-recommended specialized treatment or prescribed medications are not denied by any HMO;
- legislation to require the federal government to fund medical transportation to enable qualified Medicare recipients to access medical care;
- a comprehensive Medicare/Medicaid system with protected benefits, including prescription drug benefits and benefits for home health care, mental health services, and nonmedical aid;
- Medicare as a social insurance program available on an optional basis to all school employee groups or individual active or retired education employees in states in which public school employees are not covered by Medicare;
- open enrollment for the purchase of Medigap insurance;
qualification relief for members who elect into Medicare too late to qualify with the required 40 quarters;

the provision of low cost, accessible, and high quality prescription drugs for all individuals, including prescription drugs imported/reimported from other countries meeting all applicable safety laws of the United States;

prescription drug importation/reimportation legislation that:
- encourages the utilization of evidence-based medications;
- decreases prescription drug contamination and counterfeiting;
- addresses incorrect dosages, sale of expired prescription drugs, and sale of drugs with inadequate usage directions;

directing the federal government to negotiate prescription drug prices and use subsequent savings to fill the “donut hole” in Medicare Part D.

NEA opposes
- shifting of health care costs to the insured;
- any means test for Medicare;
- any capping of general fund support for Medicare B;
- any shift of the cost of health care under Medicare/Medicaid to the beneficiary and/or his or her family;
- any new barrier to eligibility for benefits under Medicare;
- mandatory coverage of public employees under Medicare for employee groups that have declined coverage;
- diminishing any health benefits received by active or retired members that have been achieved through state legislation or collective bargaining.

SENIOR CITIZENS

NEA supports
- increased availability of dependent care for all ages;
- a decent standard of living for the elderly, with support systems to prevent and/or treat physical and mental abuse;
- programs of assistance to lessen problems and concerns of older Americans in the United States.
SOCIAL SECURITY

NEA supports

- Social Security as social insurance, not welfare or a “means-tested” program;
- improved Social Security benefits for participants, especially low-income workers, dependents, and survivors;
- Social Security benefit equity for men and women through earnings sharing and/or benefit changes;
- guaranteed Social Security survivor/disability benefits for minor surviving children under the care of parents, grandparents, or other custodial adults;
- reductions in the Social Security retirement age;
- repeal of the Social Security “notch” that reduces benefits for individuals born between 1917 and 1926;
- strengthening the guaranteed benefit formula of the Social Security program by raising the taxable wage base subject to Social Security tax;
- legislation that protects the integrity of the Social Security trust fund, preserving funds for benefits;
- repeal of current taxes on and exemption from income tax of all Social Security benefits regardless of income;
- protection of the solvency of the Social Security system through an actuarially sound tax base that maintains the integrity of the Social Security trust fund and through the use of general revenues, if necessary;
- maintaining and/or enhancing Social Security benefits;
- full annual cost-of-living protections for Social Security recipients;
- Social Security reform that—
  - maintains or enhances the economic security of current and future generations who contribute to the financing of the Social Security system;
  - guarantees a foundation of retirement income that permits older family members to live in dignity and reduces the economic burden on younger family members caring for older family members;
  - provides a sound base of universal insurance protections to families faced with wage loss due to old age, disability, or the death of the family wage earner;
  - is equitable, nondiscriminatory, and ensures as a minimum standard that individuals covered by Social Security receive at least the same level of economic benefit provided by the existing system;
◆ minimizes Social Security fund investment risks;
◆ maintains the current, low-level costs of administering Social Security;
◆ fulfills Social Security’s existing commitments to covered employees and ensures current noncovered and/or covered state and local government employees their current, expected level of non-Social Security benefits;
◆ is integrated with sound, long-run employment and worker training/education policies;
◆ recognizes that federal investment in a better educated workforce is sound educational and employment policy that will positively affect the individual’s ability to contribute to the Social Security system;
◆ reflects careful deliberation concerning economic growth and labor market issues.

NEA opposes
◆ legislative rather than regulatory determination of the process by which the Consumer Price Index (CPI) and any adjustments resulting from it are calculated.

◆ limitations on post-retirement earnings for Social Security recipients;
◆ adverse effects on active or retired members of any CPI adjustment;
◆ privatization of Social Security.
Appendix D: Grant and Grant Forms

2010-11 NEA-RETIRED
STATE PROJECT GRANT APPLICATION

GRANT CRITERIA: Each year NEA-Retired will award State Project Grants to State Retired entities (retired locals must make application through the State Retired Organizations). In cases where a State Retired Organization does not exist, NEA-Retired will receive and review grant proposals that seek to establish a State Retired Organization. The grant award will not exceed $5,000 annually. No State Retired Organization shall receive more than two grants per year.

APPLICATION PROCESS: Please attach this completed form to an email and send it to clilyquist@nea.org.

GRANT TITLE: __________________________________________

DATE OF SUBMISSION TO NEA-RETIRED: _______________________

NAME OF STATE AFFILIATE: _________________________________

ARE YOU APPLYING FOR A ONE YEAR GRANT OR A TWO YEAR GRANT?

☑ 1 Year       ☐ 2 Year

A one year grant will conclude on July 1, 2011. A two year grant will conclude on July 1, 2012 if the retired organization submits a progress report by February 15, 2011.

PRIMARY GRANT WRITER: Please provide complete contact information for the individual responsible for communicating with NEA-Retired about the grant.

Full Name:________________________________________________

Complete Address:____________________________________________

Telephone Number:________________________ Email:____________________

STAKEHOLDERS: The following individuals must be courtesy copied on all applications.

State Affiliate Executive Director:__________________________________________

Telephone Number:________________________ Email:____________________

State Affiliate Active President:_____________________________________________

Telephone Number:________________________ Email:____________________

State Affiliate Retired Staff Liaison:__________________________________________

Telephone Number:________________________ Email:____________________
# GRANT PROPOSAL

**NEA-RETIRED SEEKS TO FUND PROJECTS THAT ADDRESS THE FOLLOWING TOPICS:**

- Membership Recruitment
- Local Development
- Intergenerational Mentoring
- Outreach to Teach
- Networking
- Drive-In Conferences for Retirees
- Communications Development

**PROJECT SUMMARY:** Describe the project’s scope and purpose in two or three sentences.

**WHO WILL BENEFIT FROM THE PROJECT?**

**WHO WILL BE INVOLVED IN THE PROJECT?**
PROGRAM OBJECTIVES: Describe the anticipated results of the project.

METHODS: Describe each step of the process you will use to implement the project.
SUCCESS CRITERIA: How will you know your grant was successful when it is complete?

<table>
<thead>
<tr>
<th>BUDGET</th>
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<tbody>
<tr>
<td>DESCRIPTION OF PURCHASES</td>
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Subtotal: $__________

OTHER FUNDING SOURCES (to be subtracted from subtotal): $__________

TOTAL AMOUNT REQUESTED FROM NEA-RETIRED GRANTS:
(cannot exceed $5,000 per year) Year 1:__________ Year 2:__________

GRANT WRITER SIGNATURE:__________________________
DATE:____________________________________________

RECEIVED BY NEA-RETIRED:__________________________
DATE:____________________________________________
The progress report form is used to share information with the NEA – Retired Grants Committee. The progress being made on the work chosen by the grant writers will be documented in this report.

<table>
<thead>
<tr>
<th>GRANT TITLE:</th>
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<tbody>
<tr>
<td>DATE OF SUBMISSION OF THIS REPORT:</td>
<td></td>
</tr>
<tr>
<td>NAME OF STATE AFFILIATE:</td>
<td></td>
</tr>
</tbody>
</table>

**IS THIS A ONE YEAR GRANT OR A TWO YEAR GRANT?**  
☐ 1 Year  ☐ 2 Year  
A one year grant will conclude on July 1, 2011. A two year grant will conclude on July 1, 2012 if the retired organization submits a progress report by February 15, 2011.

**PRIMARY GRANT WRITER:** Please provide complete contact information for the individual responsible for communicating with NEA-Retired about the grant.

- **Full Name:**  
- **Complete Address:**  
- **Telephone Number:**  
- **Email:**

**STAKEHOLDERS:** The following individuals must be courtesy copied on all applications.

<table>
<thead>
<tr>
<th>State Affiliate Executive Director:</th>
<th></th>
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<tbody>
<tr>
<td>Telephone Number:</td>
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<tr>
<th>State Active President:</th>
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<table>
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<td>Telephone Number:</td>
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<td>Email:</td>
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<table>
<thead>
<tr>
<th>State Staff Contact for Retired:</th>
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<tbody>
<tr>
<td>Telephone Number:</td>
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<td>Email:</td>
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</table>

2010 NEA-Retired State Project Grants  
Return this form to NEA-Retired by attaching it to an email and sending it to Candace Lilyquist - cilyquist@nea.org  
Page 1 of 3
**GRANT TITLE:**

**SUMMARY OF GRANT ACCOMPLISHMENTS:** Please include information to increase our shared knowledge of working with NEA-Retired organizations. (Complete a short summary of the requested information in this block; “see attached” comment is not acceptable.)

**SUMMARY OF GRANT CHALLENGES:** Please include information to increase our shared knowledge of working with NEA-Retired organizations. (Complete a short summary of the requested information in this block; “see attached” comment is not acceptable.)
2010 NEA-Retired
STATE PROJECT GRANT PROGRESS REPORT

☐ Please attach a summary of accomplishments and challenges. Activities should reflect the original action plan.

☐ Please attach a copy of your original budget with information about how monies were spent.

PLEASE SEND THIS FORM TO:

Candace L. Lilyquist
NEA-Retired
1201 16th Street NW, Suite 410
Washington D.C. 20036
The final report form is used to share information about the successes and challenges of the grant. This form is due on July 1.

**GRANT TITLE:**

**DATE OF SUBMISSION OF THIS REPORT:**

**NAME OF STATE AFFILIATE:**

**IS THIS A ONE YEAR GRANT OR A TWO YEAR GRANT?**

- [ ] 1 Year
- [ ] 2 Year

A one year grant will conclude on July 1, 2011. A two year grant will conclude on July 1, 2012 if the retired organization submits a progress report by February 15, 2011.

**PRIMARY GRANT WRITER:** Please provide complete contact information for the individual responsible for communicating with NEA-Retired about the grant.

- **Full Name:**
- **Complete Address:**
- **Telephone Number:**  Email:

**STAKEHOLDERS:** The following individuals must be courtesy copied on all applications.

- **State Affiliate Executive Director:**
  - Telephone Number:  Email:
- **State Active President:**
  - Telephone Number:  Email:
- **State Retired President:**
  - Telephone Number:  Email:
- **State Staff Contact for Retired:**
  - Telephone Number:

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2010-2011 NEA-Retired State Project Grants
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Page 1 of 3
GRANT TITLE:

SUMMARY OF GRANT SUCCESSES: Please include information to increase our shared knowledge of working with NEA-Retired organizations. (Complete a short summary of the requested information in this block; “see attached” comment is not acceptable.)

SUMMARY OF GRANT CHALLENGES: Please include information to increase our shared knowledge of working with NEA-Retired organizations. (Complete a short summary of the requested information in this block; “see attached” comment is not acceptable.)
Please attach a summary of accomplishments and challenges. Activities should reflect the original action plan.

Please attach a copy of your original budget with information about how monies were spent.

PLEASE SEND THIS FORM TO:

Candace L. Lilyquist  
NEA-Retired  
1201 16th Street NW, Suite 410  
Washington D.C. 20036
The opt out form is used to communicate the retired organizations interest in discontinuing their participation in the two year grant. The opt out form triggers a final report due in by July 1.

**GRANT TITLE:**

**DATE OF SUBMISSION OF THIS REPORT:**

**NAME OF STATE AFFILIATE:**

**IS THIS A ONE YEAR GRANT OR A TWO YEAR GRANT?**

- [ ] 1 Year
- [ ] 2 Year

A one year grant will conclude on July 1, 2011. A two year grant will conclude on July 1, 2012 if the retired organization submits a progress report by February 15, 2011.

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- **Email:**

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- **Telephone Number:**

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2010-2011 NEA-Retired State Project Grants
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Page 1 of 2
GRANT TITLE:

SUMMARY OF REASONS TO OPT OUT OF THE GRANT: Please include information to increase our shared knowledge of working with NEA-Retired organizations. (Complete a short summary of the requested information in this block; “see attached” comment is not acceptable.)

☐ Please attach a summary of accomplishments and challenges. Activities should reflect the original action plan.

☐ Please attach a copy of your original budget with information about how monies were spent.

PLEASE SEND THIS FORM TO:

Candace L. Lilyquist
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1201 16th Street NW, Suite 410
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2010-2011 NEA-Retired State Project Grants
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APPENDIX E

Tips for Successful Recruiting

Tips for Successful Membership Recruitment

- Retired membership is open to everyone in the education family—even if you do not currently organize them (education support professionals, higher education members, student members).

- Know where your numbers are—both potential and actual. Try to establish a rapport with the state retirement system—see if they will give you the member information on disk or other electronic format.

- Remember that people join for their own reasons, not for ours. The interests of the organizer may center around pension reform, for example, but the potential member may be more interested in member benefits.

Promoting Membership

- Here are a few ideas presently being used to promote NEA-Retired memberships:

  - Have local Active associations purchase memberships as retirement gifts.

  - Enable prospective members to pre-pay their lifetime memberships through an appropriate installment process, such as payroll deduction, before they retire.

  - Arrange with the state retirement board for dues deduction from the members’ pension check.

- Remember that your job is to listen, not talk, until you find out all you need to know about the prospective member. For instance:
  - What he or she knows about the retired organization/program;
  - What are his or her concerns, questions, and needs;
  - What are his or her objections, if any;
  - How the retired organization/program might fill his or her needs.

- Be familiar with the various programs and services of the retired Association and how they may be of value to prospective members. Include such things as Elderhostel, the mentoring program, and coalitions with other senior groups, such as the Older Women’s League. Know where to get additional information if you need it.
Talk about the Retired organization/program in terms that would answer the question: “What will it do for me?” Use what you have learned about the prospective member to determine what to highlight about the organization/program.

The NEA Member Benefits Medicare supplement and Long Term Care are great marketing tools and reasons for members to stay in the NEA family. Many NEA Member Benefits products are designed with retired members in mind.

Focus on NEA-Retired’s strengths, rather than attacking competing organizations.

Emphasize that by purchasing a pre-retired lifetime membership, the potential member insulates himself or herself from any future dues increases. Life memberships are easier to sell to current and soon-to-be retirees because they may remember the Active Life memberships of the 60s and 70s.

If someone shows any sign of interest in joining, try to get him or her to sign up immediately. Become familiar with the application form so that you can help. Offer to take the completed form to save the person the bother of sending it in.

Remember the basics of closing a “sale.” Remind the prospective member:

◆ Who we are.
◆ What we do.
◆ What we can do together.
◆ What the dues are.
◆ Then ask, “Will you join with us?”

Set an example! If you fit the eligibility requirements, join as a Pre-retired member yourself. Encourage your fellow staff and governance folks to do the same.

Keep records regarding individuals or groups with whom you have spoken. Record questions and comments that were raised and your estimation of the level of interest and what is needed to complete the “sale.”

Follow up your meetings with a phone call or mailing that addresses issues and interests that were expressed by the prospective member.

Do not take on this project (if you can help it) if you do not like working with older adults. Do treat them with respect. Have fun and enjoy yourself.
Overturning Objections

The first objections given are often not the real reasons for not joining and are frequently due to incorrect information or a lack of information.

- Do not argue or disagree with the prospective member. If attempts are made to get you to argue or defend, responding with a question will keep the prospect talking.
- Listen to what is being said and use listening skills while the objection is being expressed.
- Refrain from responding to an objection immediately.
- Keep the prospect talking after the objection is raised. Ask open-ended questions reflecting on what has been said. This helps the person “talk it through” without you arguing or defending.
- Listen carefully until it is your turn. Then check out your statement of what you believe the objection is before you respond to it.
- Do not underestimate your own reasons for joining. An enthusiastic member is the best person to sell the organization/program.
APPENDIX F

Suggested Workshop Titles for Pre-Retired Members

Preparing for Retirement
- Finances (including Social Security and pensions)
- Health care & insurance
- Understanding your state retirement system
- Learning about your pension benefits
- Learning about Social Security benefits
APPENDIX G

Web sites & Affinity Groups

National Council on Aging
www.ncoa.org
This Web site has information on senior advocacy and research. Includes a link to “Family Friends,” a program that connects seniors with at-risk children and families for mentoring and support.

American Society on Aging
www.asaging.org
This Web site has resources for people who work with seniors and their families. The site is designed to serve field professionals, but it also is useful to anyone interested in seniors and aging.

Centers for Medicare & Medicaid Services
www.cms.hhs.gov
This federal government Web site has Medicare and Medicaid-related resources.

Social Security On-line
www.ssa.gov
This official site of the U.S. Social Security Administration includes news, information on disability, handling family changes (like births/deaths and marriages/divorces), and other Social Security-related topics.

Alliance for Retired Americans
www.retiredamericans.org
The Alliance is a new and unique national organization that mobilizes millions of older and retired citizens to make their voices heard for public policies that support older Americans and their families.

Senior Health
www.seniorhealth.about.com
A comprehensive guide to senior health covers a host of illnesses and issues and also offers a free e-newsletter.

Senior Living
www.grandtimes.com
An Internet site filled with various informative topics for seniors.
APPENDIX H

GLOSSARY

Cash Balance Plan is a defined benefit plan that has an account like that of a defined contribution plan. Although not all cash balance plans are identical in design, they generally involve an employer crediting a percentage of pay to an employee’s account. Employees may often contribute to the account. Annual investment credits are added to the account. Unlike a defined contribution plan, however, the investment credits are not related to the investment earnings of the plan. Instead, the employer guarantees that employee account balances will increase at a specified rate.

Death Benefits are paid to the survivor of a plan participant who dies while still on the job. They differ from survivor benefits, which are paid to a survivor upon the death of a plan participant who is in retirement status.

Deferred Compensation Plan is a type of retirement savings plan in which an employee voluntarily contributes a portion of his/her salary up to an annual limit on a tax-favored basis. The money and earnings from it are not taxed to the employee as current income but taxed as income when received. Employers sometimes match employees’ contributions. State and local government employees are now eligible for “Section 457 deferred compensation plans.” These plans are offered by either the state or a local government. Some education employees now have such plans available to them. A similar type of plan, a “Section 403(b) tax-sheltered annuity,” also known as a “tax-deferred annuity,” is usually available to education employees. 403(b) plans provide the similar tax benefits as Section 457 plans do.

Deferred Retirement Option Plan (DROP) allows employees with a defined benefit plan to accumulate a lump sum. Although DROPs take various forms, they usually involve an employee who is eligible to retire. The employee may elect to participate in the DROP. Retirement benefits that are earned while in the DROP go into an account. The employee continues to work some specified period of time. The benefits in the account earn interest. When the employee finally stops working, he/she draws his/her monthly retirement benefit and usually takes the DROP amount as a lump sum.

Defined Benefit Plan is a retirement plan that offers a benefit determined by a specific formula. The benefit is usually tied to an employee’s earnings and length of service, multiplied by some percentage. It affords a guaranteed retirement benefit that cannot be reduced. It provides not only retirement benefits but also, in most cases, disability, death, and survivor benefits. It also can incorporate early retirement incentives and cost of living adjustments.
**Defined Contribution Plan** is a retirement plan in the form of an account in which contributions are invested and earn income. Employers, employees, and sometimes both make the contributions. When a participant in a *defined contribution plan* retires, the amount in the account represents his/her retirement income. The participant can take out the money at one time or withdraw it through monthly benefits or some other time interval.

**Disability Retirement** is a feature offered as part of a *defined benefit plan* of a state and local government. If a plan participant is no longer able to perform his/her job due to injury or illness, he/she may qualify for a *disability retirement*. In that event, he/she is eligible for a retirement benefit even though he/she has not met the age and service requirements.

**Early Retirement** allows an employee to retire earlier than normal retirement in exchange for a reduced benefit. The reduced benefit may be viewed as a form of penalty. It is different from an *early retirement incentive program*.

**Early Retirement Incentive Program (ERIP)** provides enhanced retirement benefits during a specific period to encourage employees to retire. Unlike *early retirement*, there is no penalty. Instead, an ERIP offers an enhancement, usually in the form of additional years of service credit. For example, an eligible employee will receive a month of additional retirement credit for each year of service credit for a maximum of three additional years.

**Hybrid Plan** is a plan that combines the concepts of both *defined contribution* and *defined benefit plans*. Some hybrid plans contain an employer-financed defined benefit plan and an employee-funded defined contribution plan, for example, Washington Teachers Retirement System Plan 3 and School Employees Retirement System Plan 3. Other *hybrid plans* compute an individual’s benefit under both a defined benefit formula and a defined contribution method and pay the individual whichever yields the higher amount. In Wisconsin, for example, the *money purchase plan* uses the employee and matching employer deposits in the individual’s account multiplied by an actuarial money purchase factor based on his/her age when the annuity begins. In Colorado, the *money purchase plan* method uses the following factors: 1) the individual’s life expectancy, 2) the value of the individual’s account (his/her contributions and interest), and 3) a matching amount equal to 100 percent of the amount in the individual’s account. Both systems calculate an individual’s benefit under the two methods and pay the individual the higher amount. For short service employees, the money purchase plan sometimes results in a higher benefit than under the *defined benefit plan*. 

**Appendices 42**
**Lump Sum Cash-Out** occurs when an individual leaves an employer from which the individual had a retirement plan, takes the funds from the plan, and uses them for non-retirement purposes. The individual pays any income tax due. He/she also may have to pay an early withdrawal penalty of 10 percent if he/she is younger than 59—or under other circumstances. An individual has options other than cashing out. He/she can leave the funds with the former employer. If the individual’s new employer has a plan, he/she may be able to rollover the funds into the new plan. Alternatively, if the individual’s new employer has no plan (or if the individual does not go to work for another employer), he/she can roll the funds into an Individual Retirement Account (IRA). If the individual takes one of the latter approaches, he/she will likely avoid the penalty and will not be liable for taxes until he/she takes the funds at retirement.

**Money Purchase Plan** is a type of *defined contribution plan*. Such plans take many forms, but they usually include an employer contribution stated as a percentage of employee salary. As noted under *hybrid plans*, some retirement systems calculate an individual’s retirement benefit under the defined benefit formula and also under a *money purchase plan*. For short service employees, the money purchase plan sometimes results in a higher benefit than under a *defined benefit plan*.

**NEA Active Life Membership** was an NEA membership category that was terminated in July 1973. This membership category does not provide for NEA-Retired Life Membership. In order to eligible for NEA-Retired programs and services, retired NEA Active Life members also must join NEA-Retired. Retired NEA Active Life members who also are members of NEA-Retired (for example, a retired teacher who has been called back to work by the school system) may not vote both as an Active and NEA-Retired member. The state affiliate determines through which of the two memberships dual members will receive their governance rights.

**Normal Retirement** is the point at which a *plan participant* is eligible for an immediate unreduced retirement benefit. A *plan participant* must usually meet some combination of age and years of service to be eligible for normal retirement. In some states, normal retirement is based on years of service only.

**Plan participant** is a member of a retirement plan and can be an active member (working), an inactive member (terminated, but not yet eligible for retirement benefit), or a retired member.
Portability is the right of an individual to move funds from one pension plan to another. Under most governmental defined benefit plans, state law allows employees to recover service credit for earlier years of work for which they will not earn such credit. These laws allow them to “purchase prior service credit,” sometimes known as “buying back prior service.” Typically, employees may purchase service credit for work with a previous employer that was not long enough to result in a pension benefit. Previous employers may include other state and local governments, the federal government, or for-profit and non-profit entities. In the context of defined contribution plans, an employee, upon terminating employment, may rollover funds in his/her account to 1) an Individual Retirement Account (IRA) that he/she manages, or 2) a retirement plan of his/her new employer (assuming the employer offers a plan).

Survivor is an individual designated by a plan participant to receive death benefits, if the plan participant dies while still on the job, or survivor benefits, if the plan participant dies while in retirement status. The survivor is sometimes called the beneficiary.

Survivor Benefits are paid to an individual designated by the plan participant. The survivor receives benefits upon the death of the plan participant who is in retirement status. They differ from death benefits, which are paid to a survivor upon the death of a plan participant who is still on the job.

Transfer of retirement funds occurs when one retirement plan is willing to accept assets from another retirement plan.

Vesting occurs when an employee acquires an irrevocable right to his/her accrued benefits under a pension plan, even if he/she leaves employment prior to eligibility for an immediate retirement benefit. A vested benefit may be paid as a lump sum or, frequently, is paid as a deferred annuity upon retirement.