

Georgia State Retiree Association Local Chapter Policies, Guidelines and Processes

GSRA is a not-for-profit association under 501(c)4 of the Internal Revenue Code. The employer ID is 20-8166023.

Policies

1. Local GSRA Chapters are sub-divisions of the State Level Georgia State Retiree Association and are vital to the GSRA advocacy efforts in educating retirees and legislative members about issues affecting retiree benefits. The Local Chapters shall provide members with educational and informational opportunities regarding retiree benefit issues and may provide a setting for expressing their opinions and social interaction.
2. Membership in a local chapter will be restricted to GSRA members in good standing.
3. Local Chapters shall not be limited by specific geographic boundaries, but shall identify the general area or specialty of coverage.
4. Members may choose to participate in one or more local chapters at their discretion.
5. The State Level GSRA website shall include a page of information about each approved local chapter.
6. Local Chapters will be supported by GSRA and no additional dues will be necessary although collecting funds for special or social events will not be considered dues. Any locally collected funds shall be retained in that local treasury.
7. The State GSRA Board shall include Local Chapter officers in accordance with the By-laws. As of January 2010, four local chapter officers shall be appointed by the State GSRA President to represent to the extent possible the north, south, east and west regions of the State of Georgia. Travel expense for one local chapter representative for the chapter that is represented on the State GSRA Board shall be reimbursed by the State GSRA for attending the monthly State GSRA Board meetings in accordance with the GSRA Travel Policy.
8. All Local Chapters, at their discretion, may be represented at the monthly State GSRA Board/Policy & Operations Committee meetings. All Local Chapters shall receive electronic communication of agendas, minutes, proposals, and legislative proposals/actions.
9. Local Chapters shall adopt the model By-laws approved by the State GSRA and forward to the GSRA Board for approval. When the State GSRA's By-laws are amended to change the provisions for membership or other sections that affect the operation of a local chapter, the local chapter shall be presumed to have modified the local By-laws. A Local chapter may petition a change in the model By-laws by submitting the change to the GSRA Board for approval.

Responsibilities

10. State Level GSRA is responsible for collecting member dues and maintaining accurate member contact and other information to effectively administer Association activities. Periodically and upon specific request via e-mail (membership@mygsra.com), State GSRA will forward an electronic copy of the member data to an emerging chapter steering committee president, local

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chapter president or other chapter designee for contacting members or verification of information. Local Chapter presidents will be provided with procedures for requesting data and shall be provided information under the State GSRA Data Security Policy.

11. Local Chapters are responsible to:
 - a. assist periodically in verifying member information contained in the GSRA database, to assist in membership renewals, and to communicate discrepancies to the State GSRA Membership Chair according to procedures communicated to the local chapters;
 - b. assist and promote membership growth by distributing applications and flyers at retiree events, holding information/educational meetings, and providing news releases to local media;
 - c. support the member advocacy efforts of GSRA by hosting meetings with elected officials.

Guidelines for forming local chapters

12. Ten GSRA members may form an emerging local chapter by forming a steering committee and tentatively designating the anticipated area of participation. Notice of the Emerging Local Chapter should be submitted to the State GSRA Membership Chairperson (membership@mygsra.com) by the designated President of the Steering Committee and shall include the names and contact information of the Steering Committee members and Steering Committee officers. The Membership Chairperson will notify GSRA Policy & Operations Committee and request that the GSRA Treasurer provide an advance of \$250 to the Steering Committee's designee for organizing and formalizing a local chapter.
13. The emerging local chapter steering committee may use the "Tips for Starting a Chapter" or proceed to formalizing a chapter by other means. At the point that the emerging chapter attains 25 members and formally adopts the model local chapter By-laws, the Local Chapter President shall submit the approved By-laws with a list of organizing members (at least 25) to the Membership Chairperson (membership@mygsra.com) for approval by the State GSRA Board. The GSRA Membership Chairperson shall notify the State GSRA Board and Policy & Operations Committee and submit to the Board for approval. Following approval by the Board, the GSRA Membership Chairperson shall notify the President of the Local Chapter of the approval and forward a copy of the approved By-laws to the State GSRA Secretary for retention with a copy to the State GSRA President, Treasurer and Web Content Chairperson. Changes to local chapter officer(s) shall be sent to the State GSRA President, Secretary and Treasurer.
14. In conjunction with submitting the By-laws or after the State GSRA Board's approval of the By-laws, the Local Chapter President or designee shall prepare and submit the local chapter budget for approval to the State GSRA Membership Chairperson (membership@mygsra.com) and the GSRA Treasurer through the calendar year (treasurer@mygsra.com). The budget shall be prepared from the month of organizing until the end of the calendar year. The amount shall be no more than at the rate of \$1,500 for 12 months, but shall be prorated at \$125 per month for the number of months remaining in the calendar year. The GSRA Treasurer shall submit the budget request to the State GSRA Board (Policy & Operations Committee) for approval. After GSRA Board approval, the GSRA Treasurer shall notify the Local Chapter of the procedures and forms

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required for reimbursement of expenses. Send budget amendments to the State GSRA Treasurer for approval. The GSRA Treasurer shall notify the Local Chapter of approval.

Annual Local Chapter Budgets

15. Each local chapter shall submit a calendar year budget for the next year to the GSRA President (president@mygsra.com) and GSRA Treasurer (treasurer@mygsra.com) no later than November 1st of each year. The maximum reimbursable amount from the State GSRA during a calendar year is \$1,500.

Reimbursement of Local Chapter Expenses

16. Direct expenses of a Local Chapter shall be reimbursed according to the approved budget by the State GSRA within three weeks of receipt by the State GSRA Treasurer of the completed and signed "Expense Reimbursement" form and attached expense receipts and/or "Travel Reimbursement" form.
17. Direct operating expenses consist of costs for the promotion (excluding cash promotion) and advocacy of GSRA, membership enrollment, and local chapter meetings.
18. Direct operating expense may also include travel expense for one local chapter representative who is not a GSRA Board member to attend the monthly State GSRA Board meetings in accordance with the GSRA Policy on Travel. The expense for this local chapter representative shall be considered the respective local chapter's expense and subject to the respective local chapter budget/expense. As of September 9, 2016, the rate is \$.14 per mile.
19. Recognizing the importance of attendance at the Legislative Day/Reception Local Chapter officers are encouraged to solicit member participation at the legislative events each year. GSRA will reimburse for vehicles traveling from distant local chapters to the Capitol. Although there is no limitation on the number of vehicles, local chapter members are encouraged to carpool to the events. Recognizing that no payment is approved for the Atlanta Metro chapter members, reimbursement shall be at the approved volunteer mileage reimbursement rate allowed and published for federal tax purposes, currently \$.14/mile. Requests for reimbursement should be submitted on the GSRA approved "Travel Expense" form, approved by a Chapter officer, and submitted to the Treasurer.
20. The local chapter Treasurer may consider the funds a "petty cash" treasury and decide not to open an official bank account for the local chapter. The local chapter designee, probably the Treasurer, should accumulate expenses into reasonable batches for requesting reimbursement.
21. Each local chapter is expected to submit the last "Request for Reimbursement" for the calendar year no later than March 31st of the following year. Expenses filed later than the three months following the end of the previous calendar year are not considered valid expenses for reimbursement. The request should also include an expense report for the entire calendar year.
22. Payments to Legislative members are controlled by the "Ethics" laws for the State. Local chapters **must not** pay legislative members a speaker's fee. It is appropriate for an officer of the

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Chapter to pay for the Legislative Member's lunch/meal and receive reimbursement as a chapter expense.

23. On November 12, 2013, the GSRA Board adopted a limitation on reimbursement from GSRA for "gifts, awards, door prizes, etc." Each local chapter will be reimbursed for a maximum of \$100 per year for expenses (with documentation) in connection with gifts, award, door prizes, etc. Each local chapter may, at the discretion of the officers, provide for this type of expenses in any amount from funds collected by the individual local chapter.

Local Chapter Communications with State GSRA

24. Local chapters are an extension of GSRA and are vital to the GSRA advocacy efforts in educating retirees and legislative members about issues affecting retiree benefits. Chapter officers are encouraged to maintain communications with the State GSRA President, Vice President, and Legislative Chairperson of outreach activities, especially those around contacting and meeting with General Assembly members.
25. Local Chapter officers are encouraged to submit articles about activities of the local chapter and news in the local area.
26. State GSRA maintains a calendar of events for GSRA local chapters. The local chapter president (or designee) is expected to submit to the Communication Chair (communication@mygsra.com) and the GSRA Administrative Aide (help@mygsra.com) of dates, times, and location of planned local chapter meetings. The information should be submitted a minimum of three weeks prior to the meeting and should ~~also~~ include the agenda for the meeting and contact information.
27. Local Chapters are encouraged to submit new articles for the general membership.

APPROVED: December 13, 2011

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AMENDED: December 10, 2013

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