

**PROCEDURES OF CSRA – Updated September 2024  
(for Officers and Committee Chairs)**

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## **Membership**

According to the CSRA Bylaws, memberships are renewed in October and November for the fiscal year October 1 to September 30. However, retirees may join the CSRA at any time during the year by paying the \$20 dues to the Foundation Office. If the dues are received after December 15, the individual's name will not appear in the Membership Directory sent with the winter newsletter to members. If membership dues are received after July 1, the person is added to the current membership list and the dues are applied to the fiscal year beginning the following October.

In 2014, the CSRA membership voted to increase the dues from \$15 to \$20 annually and to change the disbursement of the \$300 Lifetime Membership. The \$20 dues are deposited in the Operating Account. Prior to 2014, all \$300 of the Lifetime Membership contribution had gone to the Scholarship "holding" account. (See explanation of the account under "CSRA Funds.") In March 2023, the CSRA EC voted to change the disbursement of the \$300 Lifetime Membership as follows: \$100 - Operating account, \$100 - Scholarship "holding" account, and \$100 - TLI Grant account.

In January 2024, the CSRA Executive Council (EC) voted that a complimentary Lifetime Membership, as approved by the EC, may be granted on a case-by-case basis to those who have contributed large donations. At that time, the EC also approved a 1-year grace period for paying dues to those long-standing members who cannot be reached during the annual membership drive.

## **Meetings of the Association**

The CSRA has three scheduled meetings each fiscal year—one in the fall (usually mid-October to early November), one in the winter (usually during the first two weeks of February) and one in the spring (usually during the last two weeks of April). The Secretary will keep a record of attendance at each of these meetings. The President, with the approval of the Executive Council, may schedule meetings in addition to those specified in the Bylaws. Members are notified of the exact dates of these meetings via email and CSRA Newsletters three or four weeks prior to the meeting date.

In addition to the three scheduled meetings, the CSRA may have other regular meetings, such as monthly book club and breakfast club gatherings. The CSRA also has informal outings from time to time that are scheduled by the Social/Special Events Committee. These include movie outings, field trips, and other activities.

### Fall Meeting

The fall luncheon meeting is held on campus and coincides with the University's Human Resources and Medicare Open Enrollment periods so that retirees have an opportunity to receive an update concerning insurance and other benefits and to ask related questions to the University HR and Alight representatives. An Information Session conducted by the Office of Human Resources and Alight may be held during the fall meeting or as a separate online event.

During the fall meeting, we cover pertinent business matters, such as approval of any Bylaw changes, election of officers (in even numbered years), committee reports, and other pending matters of interest and concern. When possible, Scholarship and TLI Grant recipients are recognized.

## Winter and Spring Meetings

The winter meeting is a luncheon that is held either at the Georgia Archives or a restaurant chosen by the Program Committee with a speaker of interest to retirees. The spring brunch meeting is held on campus, and its main purpose is to honor new retirees. When appropriate, Scholarship and TLI Grant recipients are recognized. If necessary, business is conducted at these meetings.

## **Meetings of the CSRA Executive Council**

The Executive Council (EC) consists of the officers of CSRA, the committee chairs, the immediate Past President, Lifetime EC Members, and two “at large” members (one faculty and one staff retiree serving at the request of the President). During the EC meeting, reports and recommendations from committees are heard and acted upon, and plans are confirmed for the upcoming Association meeting.

The Executive Council has three scheduled meetings each year to plan Association meetings and to conduct most of the business of the Association. The winter and spring EC meetings are usually held four weeks prior to the Association meeting, while the fall EC meeting is usually held six weeks prior to the Association meeting.

Other meetings may be called by the President or any two members of the Executive Council as needed to conduct interim business matters.

## **Clayton State Retirees Scholarship**

At its Fall 2006 annual meeting, the Clayton State Retirees Association voted to establish a scholarship fund. It was the first scholarship exclusively for graduate students. The goal was to reach the \$25,000 endowment level within five years. Fundraising began in 2007 with an appeal to members of the CSRA and with the first fundraising event in October—a Gourmet Dinner and Wine Pairing. The five-year goal was reached in 2011. These monies have come from donations made to the scholarship fund (almost exclusively from retirees), proceeds from Gourmet Dinners, and interest earned since the fund became endowed. See [CSRA Funds](#) for the amount and number of scholarships to award each year.

Since 2007, the scholarship has been awarded each year to one or more graduate students. As of January 2021, applicants must be enrolled in a graduate program at Clayton State, completed at least 9 credit hours at CSU within an approved graduate program, and must have a 3.5 or higher GPA in their graduate classes at Clayton State. Using the criteria provided by CSRA and coordinating with the Office of Development and any other appropriate campus office, the Scholarship Coordinator in the Office of Financial Aid identifies students who are eligible, coordinates the selection of the recipient(s), and notifies the Office of Development of the recipient(s). Then, a representative from the Office of Development provides the CSRA Scholarship Committee Chairperson with the recipient(s) name(s) and contact information.

The scholarship is intended to be used for two semesters during the upcoming academic year—fall, spring, and/or summer semesters. If more than a year passes and the scholarship has not been completely used by the recipient, the funds are withdrawn from the recipient. If a recipient does not use all the funds, he/she may re-apply in a future year for the scholarship.

## **Greg Kordecki Teaching and Learning Innovations (TLI) Grants**

In 2022, the CSRA established the Teaching & Learning Innovations Grant to award CSU faculty, staff, students and retirees between \$500 - \$2,000 to assist with the development and implementation of innovative pedagogical methods or curriculum resources that enhance the teaching and learning process at Clayton State University. Applications are submitted in July and December (depending on available funds) via an online Qualtrics form. The TLI Committee reviews the applications and determines the award amount (if any) for each proposed project. Grant recipients are notified by email and instructed how to submit receipts for reimbursement by the TLI Grant Committee Chair. After completion of a funded project, grant recipients are expected to submit a one-to-two-page written report summarizing the implementation and assessment of their project as well as to make a brief oral presentation during an upcoming CSRA meeting.

## **CSRA Funds**

Dues payments are placed in the Operating account, and that money is used to “run” our organization. Donations made to the CSRA are sent to the Office of Development for deposit into the CSRA account. CSRA money sits in either a checking account or the Endowed Scholarship Account, the latter account being managed by the CSU Office of Development. Within the checking account are four categories: the Operating account, the Special Projects Account, the TLI Grant account, and the Scholarship “holding” account. The intent is to always maintain a minimum amount of \$2,000 in the Scholarship “holding” account in the event money needs to be drawn from that account to pay for a scholarship. When the Scholarship “holding” account reaches \$2500, the Treasurer requests that the funds in excess of 2,000 be transferred to the Endowed Scholarship Account. Any money transferred to the Endowed Scholarship Account cannot be transferred back into the checking account; it must be used for the CSRA Endowed Graduate Scholarship. In 2011, the goal of \$25,000 was reached in the CSRA Endowed Scholarship Fund. Since then, the amount of the scholarship has increased commensurate with the spend allocation of the Endowment Fund. In September 2024, the Executive Council voted to divide the spend allocation equally among the recipients, using \$1,500 as the minimum award amount and \$2,499.99 as the maximum award amount per student. To determine the number of scholarships to award, divide the spend allocation by \$2,000 and round to the nearest whole number. Note: The only time we would pull funds from our Scholarship Holding Account would be if the spend allocation is less than \$1,500.

- Example 1: If the spend allocation is \$3,500, we would award two \$1,750 ( $\$3,500/2$ ) scholarships totaling \$3,500 because  $\$3,500/\$2,000 = 1.75$  (round up to 2 scholarships).
- Example 2: If the spend allocation is \$6,300, we would award three \$2,100 ( $\$6,300/3$ ) scholarships totaling \$6,300 because  $\$6,300/\$2,000 = 3.15$  (round down to 3 scholarships).

## **Memorial Contributions**

When a CSRA member dies, an honorary donation of \$50 is made to the charity of the deceased family member’s choosing. It is the responsibility of the CSRA Treasurer to contact the surviving family to determine which charity they want to receive the \$50 donation. If the family does not specify a charity, the donation is made to the TLI Grant Fund.

When a Friend of the CSRA or family member of a CSRA member dies, the Sunshine Committee sends a card to the family, and the Communication Committee sends out an email to notify CSRA members.

When the donation is made to the TLI Grant Fund, the CSRA Treasurer sends a request to the Office of Development for a transfer of funds from the CSRA Operating Account to the TLI Grant Fund. When a donation is made to a charity, the CSRA Treasurer sends a request to the Office of Development for payment by check from the CSRA Operating Account to the charity. The Treasurer includes the amount of the donation, the name of the person in whose memory the donation is being made, and if available, the name and address of the person who should be notified of the donation.

The CSRA Treasurer notifies the CSRA Secretary of the donation. Then, the CSRA Secretary sends a card to the deceased member's family informing them of the CSRA donation. If the CSRA receives a thank you card from the family of the deceased member, the Secretary will inform the Executive Council.

## **Communication to CSRA Members**

### The Newsletter

The Newsletter is published three times a year – usually two weeks prior to the fall meeting and one to two weeks prior to the winter meeting and to the spring meeting. The purpose of the newsletter is to inform members of the upcoming meeting, to share pertinent information related to the business of the CSRA, and to share other items of interest to retirees. Members are also notified by email about four weeks prior to a meeting date, as a “save-the-date” email. The fall newsletter used to be mailed to ALL Clayton State retirees, but after 2020 all newsletters have been distributed only as an electronic copy (letter size pdf) via email by the Communication Committee to current CSRA members and to recent CSU retirees even if they have not yet joined the CSRA. Electronic copies of all newsletters are also distributed to appropriate campus personnel. Occasionally, a paper copy of a newsletter is mailed via U.S. mail to all retirees when accompanied by a recruiting and/or benefit-information cover letter. If paper copies are mailed, address labels and CSRA envelopes are requested from the Office of Development. Postage reimbursement is done by contacting the CSRA Treasurer with the receipt.

The Communication Chair is responsible for gathering information for the Newsletter, organizing and formatting it using Microsoft Publisher, and digitally distributing the finished newsletter in pdf format. The CSRA Executive Council provides items for the newsletter at least two weeks prior to the distribution of the newsletter. All newsletters include, among other news of interest, a list of officers and committee chairs with contact information, information about the upcoming meeting, and dates of upcoming events.

The focus of the fall newsletter is the annual fall meeting. It provides the fall meeting date and location; open enrollment information; an update on and a request for contributions to the CSRA Operating Fund, the Clayton State Retirees Scholarship Endowment Fund, the Teaching and Learning Innovations Grant Fund, the Butterfly Garden Fund, and the New Retiree Brunch Fund; an encouragement to all retirees to join the CSRA; a brief description of the work of each committee with a request for members to sign up for a committee at the fall meeting or via email.

The January newsletter contains, along with other news items,

- a list of and welcome to new members,
- a list of CSRA donors (optional).

## Email (CSRA News)

The CSRA has an email account ([CSRARetirees@clayton.edu](mailto:CSRARetirees@clayton.edu)) through the Clayton State email system for official communications. The Communication Committee is responsible for monitoring this mailbox and for maintaining two email distribution lists: 1) all CSRA members who provide an email address and 2) all recent retirees who are potential members. Names remain on the potential member list until the current CSRA Directory is distributed electronically to members, usually in January.

The Communication Chair or other designated CSRA officers or committee chairs may use this email account to send emails to CSRA members. (The subject line will be CSRA News.) The emails provide a means of contact with members between newsletters. These emails will be limited and may contain time-sensitive items that are relevant to all or most of the members or personal news of interest related to retirees. Examples of such information are as follows:

- Reminders of upcoming meetings.
- Information pertaining to benefits and other items of interest related to retirees.
- Campus Information that might be of interest to CSRA members.
- Electronic copy of current CSRA newsletter.
- Information pertaining to members' illnesses, deaths, happy occasions, etc., which is sent to the Communication Chair or to the Sunshine Committee Chair.

Members are encouraged to send personal news that they wish to share with other CSRA members or other items of interest to [CSRARetirees@clayton.edu](mailto:CSRARetirees@clayton.edu).

## Website

The CSRA maintains a website, [www.clayton.edu/CSRA](http://www.clayton.edu/CSRA), on the Clayton State University website. It is the responsibility of the Communication Committee to monitor and see that the information is up-to-date. It is maintained through cooperative efforts with the Office of Image and Communications. The website contains information about the CSRA and resources for CSRA members and retirees.

The Communication Committee Chair is responsible for delegating a member of this committee to be the Website Liaison. This liaison has responsibility for getting new content placed on the website and for maintaining consistency in format. The following officers and committees are responsible for providing the *content* of the indicated web pages to the Website Liaison.

Treasurer: Donations

Benefits Committee: Benefits for Retirees

Communication Committee: CSRA Homepage, Bylaws, Officers & Committees, and Resources for Retirees

Membership Committee: Join the Retiree Association

Program Committee and Social/Special Events Committee: Programs & Events

Scholarship Committee: Scholarship for Graduate Students

TLI Grant Committee: Teaching & Learning Innovations Grant

Any changes to the CSRA website from any committee should be sent to the Communications Chair who then sends it to the Office of Image and Communications via the website request form located at [https://claytonstate.qualtrics.com/jfe/form/SV\\_b1RJ50JKdMyESBo](https://claytonstate.qualtrics.com/jfe/form/SV_b1RJ50JKdMyESBo).

## **Responsibilities of the CSRA Officers**

### President

The CSRA President is responsible for:

1. presiding over all meetings (Association and Executive Council) of the CSRA.
2. developing the agenda for Association meetings, with input from the Executive Council.
3. preparing a printed program for the fall and spring meetings.
4. scheduling and making the arrangements for Executive Council meetings—developing the agenda, determining what committees should report, scheduling the meeting room, etc. (Requests for use of the Spivey Board Room should be made by completing a Facility Rental Request Form at the Continuing Education website.) If the EC meeting is held via Zoom, the President presides, but the Zoom host manages the online technicalities.
5. appointing a Treasurer.
6. appointing committee chairs and ad hoc committees, as needed.
7. appointing “at large” members of the Executive Council.
8. making disbursements on behalf of the CSRA, along with the Treasurer, with the approval of the Executive Council.
9. writing the President’s Message for the CSRA newsletter.
10. writing a Welcome Letter to be mailed to all new CSU retirees. Send electronic copy of letter to Communication Chair for printing and mailing. ([See Appendix for a sample Welcome Letter.](#))
11. coordinating with the Communication Chair in overseeing updates to the CSRA Procedures Manual as needed.
12. acting as the official spokesperson of the CSRA.
13. representing the CSRA at the Georgia Retiree Council of the Board of Regents and at GA-HERO meetings.
14. deciding which on-campus personnel should be invited to our meetings and receive copies of the CSRA newsletter.
15. planning and arranging an annual meeting for designated members of the EC and the CSU President.

### Vice President

The CSRA Vice President is responsible for:

1. coordinating the program portion of all Association meetings, in collaboration with the Program Committee. This responsibility includes:
  - a. inviting program speakers.
  - b. writing a newsletter article regarding the program and sending the article to the Communications Chair.
  - c. making arrangements with The HUB for AV equipment requested by a program speaker.
  - d. greeting program speakers at Association meetings.
  - e. paying for program speakers' lunches (CSRA will reimburse the VP for speakers' lunches).
  - f. introducing program speakers during Association meetings.
  - g. presenting an appreciation gift card or speaker fee to speakers after the program.
  - h. sending a thank you acknowledgement (email or CSRA note card) to the program speaker after the meeting.
  
2. making the room and food arrangements for all Association meetings. This responsibility includes: ([See Appendix for more details.](#))
  - a. coordinating with the President, Executive Council and Human Resources (fall meeting) to determine meeting dates.
  - b. completing an online Facility Rental Request form on the Continuing Education website to reserve rooms for the fall and spring meetings.
  - c. completing a Catering Agreement with the CSU Catering Manager for the fall and spring meetings.
  - d. reserving an off-campus location (e.g., Georgia Archives or local restaurant) for the winter meeting, submitting a check request to the Office of Development for paying room fee (if applicable), and scheduling and paying a caterer (if applicable). Note: The VP or designee may either pay for the caterer and receive reimbursement or submit a check request in advance.
  - e. After receiving the luncheon RSVP list from the Communication Committee, send the count to the catering representative.
  
3. inviting special guests, including individuals who provide special services to the CSRA, to Association meetings and sending a thank you acknowledgement (email or CSRA note card) to guests after the meeting.
  
4. providing table decorations for the fall and spring meetings.
  
5. performing the duties of the President in the event of his or her absence, resignation, or inability to perform.

See [Appendix](#) for more details related to planning the fall meeting.

### Secretary

The CSRA Secretary is responsible for:



1. taking notes of the business part of the fall, winter and spring meetings when a significant item of business is conducted (e.g., electing officers, voting on Bylaws, etc.) and distributing them via email to the members of the Executive Committee. If there are corrections, EC members email them to the Secretary who makes changes accordingly and then saves the notes in the CSRA records.
2. taking minutes for all Executive Council meetings and distributing them to members of the CSRA Executive Council. If there are corrections, EC members email them to the Secretary who makes changes accordingly and presents the minutes at the next EC meeting for their approval.
3. sending thank you acknowledgements to major (\$500 or above) financial donors (email acknowledgement to members and a written thank you note to non-members) and memorial notes to members' families regarding the \$50 honorary donation upon the death of a CSRA member. To be effective, the Secretary shall send these notes in a timely manner after receiving notification from the Treasurer.
4. storing CSRA note cards and envelopes and requesting more to be printed via CSU Media Services when the supply is low.
5. printing name tags for all Association meetings. Note: The Communication Committee will send the Secretary an RSVP list at least one week prior to the meeting. See the [Appendix](#) for instructions on creating the name tags.
6. greeting members as they arrive at Association meetings, taking roll using the RSVP list, and distributing name tags and programs (if applicable).

### Treasurer

The CSRA Treasurer is responsible for:

1. creating a budget, with input from the members of the Executive Council.
2. maintaining and reconciling the financial records of the CSRA, including tracking membership dues, meal fees, contributions, and expenditures. When the members pay their dues in the fall, the dues form is sent to the Office of Development, which records the income and then sends a copy to the CSRA Treasurer, the CSRA Vice-President, and the Membership Chair. These three CSRA members collaborate to create a specific breakdown of income into the categories of dues, luncheon payments, and donations. They ensure that the records of the CSRA match the records provided by the Development Office.
3. preparing an updated itemized financial report for each Executive Council meeting based on the monthly financial report received from the Office of Development and based on his/her own CSRA accounting records. This report shows the source of all the income and expenditures (including details for each disbursement). The Treasurer should distribute the report to members of the Executive Council via email at least one week prior to the meeting.
4. contacting the Development Office to ask for clarification if a deposit or expenditure indicated on a report from the Development Office is unaccompanied by an explanation of the source or

purpose. Subsequently, the Treasurer records that information in the Treasurer's report to the Executive Council.

5. approving payments, including reimbursements, invoices, and transfer of funds. ([See Appendix for details on reimbursements.](#))
6. contacting the surviving family of a deceased CSRA member to determine which charity they want to receive the \$50 honorary donation. (See [Memorial Contributions](#) for more explanation.)
7. notifying the CSRA Secretary as to who should receive a thank you acknowledgement for a donation. Whenever a donation is made outside of the fall enrollment period, the Office of Development sends the CSRA Treasurer the names of the individuals making the donation and the dollar amount of the donation.
8. sending updates regarding the content on the "Donations" section of the CSRA webpage to the Communications Chair upon request.

## **Committees**

The CSRA currently has the following standing committees:

- Benefits Committee
- Communication Committee
- Membership Committee
- Program Committee
- Scholarship Committee
- History Committee
- Social/Special Events Committee
- Sunshine Committee
- Teaching & Learning Innovations Grant Committee

Ideally, the committees should do the "*nitty gritty*" work of the Association, rather than the Executive Council. Committees should meet as needed, and the Chair of the committee reports their activity at the next Council meeting. This gets more members involved in the work of the CSRA. The Chair of each of these committees sits on the CSRA Executive Council.

The Committee Chairs are appointed by the CSRA President on a volunteer basis. Chairs should be changed periodically. Below is a brief description of the responsibilities of the permanent Committee Chairs.

### **Benefits Committee**

The Chair of this committee is the CSRA liaison with the Office of Human Resources in representing the interests of CSRA members. As needed, he/she will also meet with other offices of the college regarding retiree benefits. This Chair also works to keep CSRA members informed of the benefits available to them as retirees of Clayton State University. Specifically, the Benefits Committee:

1. periodically reviews the Retiree Handbook published by HR, and, if appropriate, makes suggestions whenever the Handbook needs to be updated. This review includes verifying the

retiree and Emeritus benefits, which are listed in the Handbook.

2. communicates retiree and Emeritus benefits to members annually via meeting announcements, newsletter articles, and/or emails.
3. sends updates regarding the content on the “Retiree Benefits” section of the CSRA webpage to the Communications Chair upon request.
4. prior to the fall meeting, solicits questions from CSRA members related to their healthcare benefits. These questions are sent to HR and our Alight representative (or USG contracted representative) so that they will have answers for retirees at the Information Session. If possible, questions/answers will be distributed via email after the meeting.
5. advises surviving spouses, dependents, or designated contacts regarding reporting the death of a retiree, claiming life insurance, terminating healthcare benefits, submitting claims to Alight representative (or USG contracted representative), etc.
6. checks the TRS website and the B.O.R. website occasionally for relevant information pertaining to retiree benefits and shares that information with the Communication Committee for distribution to members.

### Communication Committee

The Chair of this committee is responsible for the newsletter, the website, and emails to CSRA members. Specifically, the Communication Committee:

1. determines the content for each newsletter, gathers the information for the newsletter, sends it to the newsletter editor (unless the Chair is the editor) for digital layout and proofs the copy before it is distributed to members (or goes to printing if it does).
2. serves as the Website Liaison with the Office of Image and Communications and updates the content of “CSRA Homepage,” “Bylaws,” “Officers & Committees,” and “Resources for Retirees” on the CSRA web page.
3. maintains an email list of all CSRA members who provide an email address.
4. maintains (and distributes via email or U.S. Postal mail) electronic or paper copies of the winter newsletter, the CSRA Directory, and the spring newsletter. ([See Appendix for mailing procedures.](#))
5. maintains (and distributes via email) electronic copies of the winter and spring newsletters to designated on-campus personnel, including a copy to the CSU Archives.
6. sends “CSRA News” emails to the CSRA membership using the email address [CSRARetirees@clayton.edu](mailto:CSRARetirees@clayton.edu). These emails are items of interest to the CSRA members.
7. creates and distributes Qualtrics forms for membership, donations, meeting RSVPs, etc.; extracts membership data to send to the Membership Chair, donation information to send to

the Treasurer, and meeting RSVP data to send to the Vice President and Secretary.

8. sends an email and/or posts in the CSRA Newsletter appropriate contact information for new members joining the CSRA after the CSRA directory is published.
9. sends email reminders to CSRA members prior to an upcoming meeting.
10. monitors the CSRA email at least weekly.
11. checks the content of the following pages of the CSRA Website: CSRA Homepage, About the CSRA page, Officers and Committee Chairs, Association Bylaws, Useful Resources.
12. includes in the CSRA newsletter information from USGRC meetings.
13. announces the upcoming GA-HERO and AROHE meetings.
14. creates, maintains and prints a luncheon RSVP list. The Communication Committee will send the RSVP count to the CSRA Vice President and the RSVP list to the CSRA Secretary for creation of the name tags for the meeting.
15. maintains an adequate inventory of stationery and envelopes stored in the Office of Development.

The Chair may request additional assistance from the CSRA Executive Council and from other committees pertaining to the content of the website and the newsletter.

### Membership Committee

The Chair of this committee is responsible for working with the Office of Development and the Office of Human Resources maintaining a current membership list—encouraging new retirees to join, welcoming new members, and each year renewing memberships. Specifically, the Membership Committee:

1. maintains and updates a current membership list with telephone, email and mailing address information and shares any changes and/or new contact information with the Communication Chair/CSRA Email Manager.
2. coordinates the collection of annual membership dues.

The Membership Chair updates the membership dues form yearly. Dues are paid through an online portal. The Membership Chair works with the Communication Committee to update the online dues payment form. Upon request, a type-written copy of the dues form can be mailed to a member by the Membership Chair. All completed type-written and online copies of the membership dues forms are kept by the Membership Chair for future reference.

Membership dues are collected once a year in early fall (prior to the Annual CSRA Fall Meeting) from newly retired and current members.

The Office of Development sends a report indicating those who have paid their dues to the

Membership Chair and the CSRA Treasurer to verify payment information and to crosscheck dues payment.

Periodically, after the fall meeting, reminders are sent to those who have not renewed their membership. In December of each year, the Membership Committee follows up again with any members who have not yet paid their annual dues. This can be done by email or telephone. By the end of December, those members who have still not responded or paid their dues are removed from the membership list.

3. maintains a list of "Friends," Regular, and Lifetime CSRA memberships.
4. prepares an annual CSRA Directory.

In early winter of each year, an updated report of membership is prepared in a CSRA Directory. The Membership Chair prepares the directory of all retirees who have given their permission to publish their contact information. This directory is distributed via email to the membership and usually accompanies the winter newsletter. Upon request, the Membership Chair may mail a hard copy of the directory to a member. If this is done, the Membership Chair asks for postage reimbursement from the CSRA Treasurer.

5. works with the Office of Human Resources throughout the year to maintain a current list of new retirees. New retirees pay no membership dues for one year from date of retirement, and the Membership Chair keeps these records.

During their retirement planning meeting with the Office of Human Resources, new retirees are offered a release form giving their signed permission to be contacted by the CSRA Membership Committee for recruitment. If the new retiree does not sign this form, the CSRA Membership Committee cannot contact him/her.

6. recognizes Clayton State new retirees at an annual CSRA New Retiree Brunch.

In the spring of each year, the CSRA hosts a New Retiree Brunch for those CSU retirees who have announced their retirement. The purpose of this brunch is to honor new retirees and their service at Clayton State. The Office of Human Resources sends the Membership Chair and the Communications Chair/CSRA Email Manager a list of new retirees for that year. Both Membership and Communications work together to contact these new retirees to gather biographical information and to invite them to the brunch. The Membership Chair introduces the new retirees at the brunch and reads their biographical information, which is printed in the program. The Membership Chair, the Vice-President, and the Communication Chair coordinate preparation of this section of the printed program.

7. sends updates regarding the content on the "Join the Retirees Association" section of the CSRA webpage to the Communications Chair upon request.
8. serves on an ad hoc committee appointed by the CSRA President to update the CSRA brochure.

The CSRA President assigns a committee to update the CSRA brochure usually every three or four years. The Chair of this ad hoc committee is responsible for contacting the appropriate

campus staff member to complete the desktop publishing and printing of the brochure. This brochure is distributed by the Office of Human Resources to prospective retirees. It contains information on the CSRA activities, contributions, and endowments to entice new retirees to join.

### Program Committee

The Chair of this committee is the CSRA Vice-President. This committee is responsible for assisting the Chair with items 1-4 under the list of [Vice President responsibilities](#). Specifically, the Program Committee:

1. coordinates the program portion of all Association meetings.
2. makes the room and food arrangements for all Association meetings.
3. invites special guests, including individuals who provide special services to the CSRA, to Association meetings and sending a thank you acknowledgement (email or CSRA note card) to guests after the meeting.
4. provides table decorations for the fall and spring meetings.
5. sends updates regarding the content on the “Programs & Events” section of the CSRA webpage to the Communications Chair upon request.

### Scholarship Committee

The Chair of this committee works with the CSRA Executive Council in overseeing the Clayton State Retirees Scholarship—communicating with the campus Financial Aid Office as to the criteria for selection, with the Office of Development as to the funding of the scholarships, and with the designated annual scholarship recipients to assure the individuals are invited to the fall luncheon. Specifically, the Scholarship Committee:

1. prepares the Scholarship Brochure.
2. sends updates regarding the content on the “Scholarship for Graduate Students” section of the CSRA webpage to the Communications Chair upon request.
3. writes the article introducing the new scholarship recipients in the fall CSRA newsletter and introduces the new scholarship recipients at our Association meetings.

If the CSRA membership desire any additional fund-raising events, the Scholarship Committee will work with the CSRA President and Executive Council to appoint an ad hoc Scholarship Fund Raising Committee to plan fund raising strategies.

Fund raising drives may be held as a separate event or in conjunction with a planned retirees meeting. Either way, an ad hoc Scholarship Fund Raising Committee is responsible for keeping track of the donations and incurred expenses. It has been an accepted practice to present the opportunity for

members to make a scholarship donation on the fall membership dues form, even though the fall meeting is not considered a fund-raising drive.

### History Committee

The History Committee preserves the documents of the CSRA and promotes the history of our organization. Specifically, the History Committee:

1. collects documents relative to the Clayton State Retirees Association. These documents are turned over to the CSU Archives for permanent storage. They include documents such as Membership Rosters, Bylaws, minutes of Executive Council meetings, minutes of general membership meetings, newsletters, photographs, and information about various programs and events. These documents are collected in chronological order in yearly folders for easy reference.
2. maintains a timeline of meetings and events of the CSRA. A copy of each year's timeline is to be put in the yearly folder.

### Social/Special Events Committee

The Social/Special Events Committee plans and promotes social activities for our members. Specifically, the Social/Special Events Committee:

1. selects and plans informal social events (movie outings, trips, etc.) for CSRA members.
2. sends email announcements or newsletter articles about scheduled social events to the Communication Chair.
3. reports about social events at Executive Council and Association meetings.
4. sends updates regarding the content on the "Programs & Events" section of the CSRA webpage to the Communications Chair upon request.
5. organizes a memorial gathering to honor deceased CSRA members every two years (or when sufficient need arises).

### Sunshine Committee

This committee is responsible for sending cards or flowers to members for illness or for special occasions in their lives.

Specifically, the Sunshine Committee:

1. sends a "Thinking of You" or "Get Well" card on behalf of CSRA members to another member who has had surgery or a serious illness.
2. sends a "Sympathy" card on behalf of CSRA members to another member when an immediate family member dies.

3. sends a “Sympathy” card on behalf of CSRA members to the family when a member dies.
4. sends flowers to a member when the CSRA Executive Council decides it’s appropriate.
5. requests reimbursement from the CSRA for cards, postage, and flowers.

In all situations, members of CSRA are also encouraged to send personal messages to a fellow member.

### Teaching & Learning Innovations (TLI) Grant Committee

The TLI Grant Committee awards grants to CSU faculty, staff, students and retirees for the development and implementation of innovative pedagogical methods or curriculum resources that enhance teaching and learning at Clayton State University. The Chair of the TLI Grant Committee is responsible for collaborating with the CSU Treasurer to manage the TLI Grant funds and for making regular reports to the Executive Council. Specifically, the TLI Grant Committee:

1. develops and updates the TLI Grant Call for Proposals.
2. creates and maintains an online TLI Grant application via Qualtrics.
3. sends a Call for Proposals email to the CSU Provost to send out to ALL Campus at the end of June and the end of November (depending on funds).
4. reviews the submitted applications and selects the projects to fund, including determining the amount to fund.
5. notifies the grant recipients by email and instructs them how to submit receipts for reimbursement.
6. contacts the grant recipients upon completion of their projects to request a written report and to schedule an oral presentation at an upcoming CSRA meeting.
7. sends updates regarding the content on the “Teaching & Learning Innovations Grant” section of the CSRA webpage to the Communications Chair upon request.

### Ad Hoc Committees

The CSRA President may appoint ad hoc committees on as needed basis. The current ad hoc committees are Book Club, Breakfast/Lunch Club, and Butterfly Garden Service Group.



## Appendix

### Scheduling a Meeting/Event on Campus (CSRA Vice President)

When scheduling a meeting on campus,

- determine the date of the event - To determine the date/time of the event, work with the CSRA President and Executive Committee as well as
    - CSU HR (if the meeting will involve Open Enrollment/Benefits)
    - CSU Continuing Education (more details below)
- NOTE: Contacting the CSU offices several months in advance (as soon as you know the date) is recommended because rooms often are already booked.

Once the date/time of the meeting is determined,

- contact Continuing Education, 678 466 5118 or [ce@clayton.edu](mailto:ce@clayton.edu), to determine if room(s) are available. If the room(s) are not available, select another date/time going through the processes listed above.
  - If the room is available and you will have food served at this meeting,
    - ask the CE representative for contact information for Food Services.
    - contact Food Services to confirm their availability for the date/time (if that date/time does not work for food services, another date will need to be selected and the process described above starts over).
- Once the date/time for the meeting is finalized with CE and food services,
  - complete the forms required by CE AND Food Services (these forms can be obtained by contacting 678 466 5118 or [ce@clayton.edu](mailto:ce@clayton.edu)). These forms will ask for the following:
    - menu selection/cost of food
    - specific rooms needed and set up in each room (tables, chairs, etc.)
    - electronic needs, such as microphone, sound system requests, etc.
  - Once the date, rooms, and food service needs are finalized, email the liaison in the Office of Development to provide the dates/times. You will need to coordinate with the liaison in the Office of Development to
    - set up online payment by members for the event (checks and credit card payments). The Office of Development liaison will keep track of those who register/pay.
    - send online payment website address to the CSRA Communication Chair to link from an online RSVP form.
    - confirm that the invoice from food services gets to Office of Development and food service invoice is paid after the event. Note: In order for food service invoice to be paid, the CSRA Vice President must complete a yellow reimbursement form and email it to the Office of Development, copying the CSRA Treasurer for approval.
  - notify and work with the Communications Chair to be sure the meeting information (including payment information) is sent to the CSRA members.

- identify and invite appropriate CSU campus guests to the meeting. The number of guests needs to be included in the list of total attendees that is provided by the Office of Development.
- Notify Food Service representative with the final number by the date provided by food services.
- Notify CE of final number of guests also and make any adjustments to room set up if needed (by the date provided by CE).

## **Getting Reimbursed**

If a member pays out of pocket for Executive Council-approved CSRA expenses, that individual submits the receipt and request for reimbursement to the Office of Development, who then gets approval for payment from the CSRA Treasurer, cuts a check, and sends the check to the individual requesting reimbursement.

The easiest way to accomplish this is as follows: 1) obtain from the Office of Development retiree liaison a “yellow reimbursement form,” 2) complete the form and attach receipts (if applicable), and 3) send an email to both the CSRA Treasurer and to the retiree liaison in the Office of Development requesting reimbursement for the expense. Be sure to describe what the expense is for, the account from which to deduct the expenditure (operating, butterfly garden, etc.), and the amount. Once the CSRA Treasurer has approved the expenditure, the retiree liaison gives both the approval email and the yellow reimbursement form to the appropriate person in the Office of Development to cut the reimbursement check. Both the Office of Development and the Treasurer keep a copy of the transaction.

The Treasurer keeps a copy of all approved expenditures in a notebook with copies of the financial statements from the Office of Development. This allows the Treasurer to keep up with expenses and catch any expenses that should not be charged to the CSRA.

## **Payment for CSRA Mailings**

When mailings are sent out to the CSRA members, there are two payment options: 1) transfer of funds and 2) personal reimbursement.

**Transfer of Funds:** Because the CSRA does not have a University account mailing code, the Office of Development coordinates a process to pay for CSRA mailings, newsletters, etc. In other words, postage for CSRA mailings is applied to the Office of Development Code 93. After the mail out is prepared and taken to the Mail Center, the Development liaison sends an email to the clerk in the Mail Center to confirm by reply email the postage amount used. Upon receipt of his confirmation, the Development liaison completes the Transfer section of Foundation reimbursement form and emails the Treasurer for payment approval. Upon Treasurer approval by reply email, it is submitted to the Constituent Relations Manager in the Office of Development for processing.

A check is cut from the Retirees Foundation Account (from the Operating Budget). A deposit form is submitted to the Bursar’s Office with the check and backup detail to reimburse the Office of Development Account. The Development liaison receives a confirmation receipt, keeps a copy, and provides the original to the Constituent Relations Manager in the Office of Development.

**Personal Reimbursement:** Alternatively, a CSRA member may pay for printing and postage and be reimbursed from the CSRA Operating Fund.

### **Storage of CSRA Materials and Premium Gifts**

The CSRA stationery is kept in the Office of Development and is available to any of the officers conducting official business of the Association. Other items stored in Office of Development include the CSRA mailing envelopes and the return envelopes for the Dues Forms. Maintaining an adequate inventory of stationery and envelopes is the responsibility of the Secretary and the Communication Chair.

All other CSRA items, including leftover premium gifts, luncheon decorations, etc. are stored at the home of officers and committee chairs. Our goal is to acquire an on-campus filing cabinet or closet for storage.

### **Creating Name Tags for Meetings**

Below are the instructions for creating name tags using Avery's free online website.

1. Go to <https://www.avery.com/software/design-and-print/>.
2. Click on the Start Designing button.
3. Create an Avery account, if you don't already have one.
4. Choose Name Badges and Name Tags on the left side of the screen.
5. Scroll down and select Template #88395 (or whichever one you purchase).
6. Click on Choose Design.
7. Click on the blank horizontal label.
8. Click on Customize.
9. Click on Image < Add Image.
10. Click on Browse for File.
11. Locate the CSRA logo file.
12. Click Open.
13. Resize/Position the logo on the name tag.
14. Click on Import Data < Import Data.
15. Click on Browse for File.
16. Locate the Excel file containing the RSVP names.
17. Click Open.
18. Check the First and Last columns; uncheck the remaining columns; uncheck the first row containing the column headers.
19. Click Next.
20. Drag the First and Last blocks onto the name tag.
21. Click Next.
22. Click Finish.
23. Click and drag the Name textbox to the desired location on the name tag.
24. Select the text and change the font to Arial > 24 pt.

25. Click More.
26. Click Shape, and select the rectangle.
27. Scroll down and set the Fill to No Fill and the Outline to black. Set the Line Width to 1 or 2.  
Uncheck the Lock Aspect Ratio checkbox. Enter Width = 3.25 and Height = 2.25.
28. Drag the rectangular border onto the name tag and position it in the center.
29. Click Preview & Print.
30. Click on Print it Yourself.
31. Click Save.
32. Enter a Project Name (e.g., January 2018 CSRA Name Tags).
33. Click on Save to Your Account or Save to My Computer.
34. Save the project file.
35. Click Download PDF.
36. Select Save File. Note: The file will save to your Download folder.
37. Click OK.
38. Click Yes, everything's great or close the window.
39. Copy the Preview.pdf file from your Downloads folder to a flash drive.
40. Take the flash drive to Office Depot, Staples, etc. to be printed. Note: You may want to rename the file before copying it to your flash drive. You will want to purchase a package of the Avery labels before taking the job to the print counter.

## Welcome Letter to New Members

Each spring, the CSRA President sends a welcome letter to the Communications Chair to mail out to the year's new retirees along with an invitation to the New Retiree Brunch. The content of the letter (see sample below) should include an invitation to join the Clayton State Retirees Association, the purpose of the organization, and the main programs offered to its members.



[Name of New Retiree],

[Date]

On behalf of the Clayton State Retirees Association (CSRA), I would like to invite you to join our organization, which is open to ALL retirees of CSU, both faculty and staff. As a member of the CSRA, you will enjoy continued fellowship with former colleagues as well as receive important information through emails and newsletters regarding benefits, campus updates, and retiree meetings/events.

The CSRA has three meetings each year—a luncheon meeting held on campus in late October or early November, a luncheon meeting held off campus during the first or second week of February, and a brunch meeting held on campus during the last week of April or the first week of May. In addition to our regular meetings, the CSRA offers a monthly Book Club and a Breakfast/Lunch Club. Our retirees also maintain the CSRA Butterfly Garden, award annual graduate scholarships for CSU students, host a memorial service honoring recently deceased retirees, and fund Teaching & Learning Innovations Grants for CSU faculty, staff, students and retirees for the development and implementation of innovative pedagogical methods or curriculum resources that enhance teaching and learning at Clayton State University.

As a recent retiree, you and one guest are invited to attend our annual brunch honoring this year’s new retirees at CSU. Please see the enclosed invitation for more details. In addition, an engraved brick will be placed in our Butterfly Garden in your honor, and you are eligible to receive a complimentary one-year membership in the CSRA. After the first complimentary year, retirees may either pay \$20 annual dues or pay \$300 for a lifetime membership. We sincerely hope you will decide to join the CSRA, and we look forward to seeing you at the New Retiree Brunch.

\_\_\_\_\_, CSRA President