

## **RESPONSIBILITIES OF THE VICE PRESIDENT FOR FRIENDLY SERVICE**

Bylaws: ARTICLE V, Section 7

### Elected Officer

Chair of the Friendly Service Committee which consists of the zone Friendly Service chairs.

1. Convene and conduct all meetings of the Friendly Service Committee and provide leadership and guidance for all zones Friendly Service chairs.
2. Distribute forms and disseminate pertinent and / or new information regarding practices, procedures, and responsibilities.
3. Attend all meetings of the Association's Executive Board to report pertinent Friendly Service information.
4. Report back to the zone Friendly Service chairs pertinent information from the Executive Board.
5. Assist zone Friendly Service chairs and others with problem solving.
6. Update responsibilities and procedures for dissemination to zone Friendly Service chairs, who will then distribute the guidelines to unit Friendly Service chairs.
7. Establish deadline date for completion of annual reports.
8. Compile data received from zone Friendly Service chairs' annual reports.
9. Present an oral and a written report of Friendly Service activities and accomplishments for the year at the Association's Annual Meeting.
10. Prepare newsworthy items related to Friendly Service activities for publication in *YORK STATE*.

Revised March 2011

## **RESPONSIBILITIES OF ZONE FRIENDLY SERVICE CHAIR**

1. Attend the yearly meeting of the Friendly Service Committee. Designate a substitute if you cannot attend.
2. Distribute forms and to disseminate pertinent information regarding practices, procedures, responsibilities, and expectations.
3. Collect and compile statistical data from unit chairs\* and send completed report to the Association's Friendly Service Committee Chair by August 1<sup>st</sup>.
4. Distribute Certificates of Appreciation to unit chairs\* for presentation to 80 year olds. A list of the names and addresses for your zone are available upon request from the Zone Membership Representative in the Albany Office.
5. Report pertinent Friendly Service information to your Zone Executive Board Meetings.
6. Report Friendly Service activities to Zone membership at your Annual Zone Meeting.
7. Edit holiday greeting card list for the Albany Office. Add names and addresses of the 90+ year olds, nursing home residents, and shut-ins not included on the original list. Return corrected list to the Albany Office by November 15<sup>th</sup>.
8. Frequently e-mail or call the Zone Membership Representative in the Albany Office to report address changes and member deaths. (Telephone: 518-482-3509 E-mail: [taoffice@nysrta.org](mailto:taoffice@nysrta.org))
9. Raise awareness of financial assistance that is available to retired member educators through the various grant programs of the Association.
10. Fill out the appropriate application to have your Zone President apply for additional funds after the initial \$400, issued by the Association (\$200) and your Zone (\$200), is used. Additional funds are to be matched by your Zone.
11. Assist Unit Chairs\* in solving problems.

\* If the zone has active units, otherwise it is the responsibility of the Zone Friendly Service Chair.

## **RESPONSIBILITIES OF THE UNIT FRIENDLY SERVICE CHAIR**

1. Organize Key Workers and convene needed meetings. Be sure that every Key Worker knows his/her job description.
2. Provide assistance to retirees in need. If unable to do so, refer to/confer with your Zone Chair, Association Friendly Service Chair, or an appropriate agency.
3. Maintain a record of services provided and expenses incurred.
4. Report pertinent information at unit meetings.
5. Compile statistics for end-of-year report. Send completed report to your Zone Friendly chair by July 15.
6. Report address changes and deaths of members to your Zone Friendly Service Chair or to the Zone Membership Representative in the Albany Office regularly.
7. Send a list of 90+ year olds, nursing home residents, and shut-ins, with addresses to your Zone Friendly Service Chair by November 1<sup>st</sup>.
8. Present a Certificate of Appreciation to 80 year olds. Use discretion as to how, when, and where (age is not the main determining factor).
9. Assist Key Workers in solving problems.
10. Present a Friendly Service Certificate of Appreciation to deserving workers.
11. Encourage Keyworkers to seek out members in need of financial assistance.

Revised March 2011

What may seem like wasted space in this spot is intended to provide integrity to the material on the pages following.

## **RESPONSIBILITIES OF FRIENDLY SERVICE KEY WORKERS**

1. Assist members in your Unit who have special needs. If the need is something you cannot provide, contact the Unit Friendly Service Chair\*, the Zone Friendly Service Chair, or the Association Friendly Service Chair.
2. Keep accurate records of services provided; i.e. phone calls, visits, cards, gifts, etc.
3. Keep accurate records of expenses incurred for Friendly Service activities even if reimbursement is not requested.
4. Submit itemized expenses to your Unit \* Friendly Service Chair.
5. Help plan special celebrations for the 90+ year olds, the shut-ins, and the nursing home residents.
6. Complete a report of activities from July 1<sup>st</sup> through June 30<sup>th</sup>, as well as expenses incurred, and send to the Unit Friendly Service Chair\* by July 5<sup>th</sup>.
7. Keep your Unit Chair\* apprised of changes in status of members; i.e. death, change of address, financial need, etc.

\* If a zone does not have active units, then the Zone Friendly Service Chair is to be used.

8. Seek out members who are in need of financial assistance and initiate appropriate referral.

Revised October 2009

## **SERVICES PROVIDED BY FRIENDLY SERVICE WORKERS**

1. Phone calls.
2. Personal visits.
3. Greeting cards - birthday, get well, holiday, sympathy, thinking of you, etc.
4. Celebrations - honoring birthdays of those who are 90 years or older with a party, dinner out, photo, small group visit, etc.
5. Gifts - small, appropriate gifts may be presented to the 90 + year old, the shut-in, the handicapped, or the nursing home resident.
6. Seek out those members with special needs and make referrals to appropriate agencies both local and with the Association..
7. Financial Assistance
  - a. The President's Fund provides a one-time lump sum gift of up to \$500.00 to the recipient in need. It is available for an emergency. The President may grant the assistance upon request from a Friendly Service worker.

b. Two forms of financial aid are available to members of NYSRTA through the Robert R. DeCormier Trust. Friendly Service workers need to be aware of these explanations and eligibility requirements that were recently established by the DeCormier Trustees. They are:

NYSRTA members may receive financial assistance from the Trust Fund if circumstances have placed them in a situation where financial assistance is needed and justified. A member who is in need of financial assistance should ask for the proper application form from the Zone's Friendly Service Chair or from the NYSRTA office. The forms are also available from the Association's website at [www.nystra.org](http://www.nystra.org).

A financial aid application can be submitted by members of NYSRTA who meet the following qualifications:

- current membership and at least three years' immediate prior membership in NYSRTA,
- at least 55 years of age,
- a minimum of 15 years as a certified or non-certified staff member in an educational institution or the member spouse of such a member or deceased member, and
- a financial need or special circumstance requiring financial aid.

Two forms of financial aid are available to members of NYSRTA:

(1) The Monthly Stipend. When long-term financial support is approved by the Trustee Board, a monthly check is sent to the individual.

(2) The Special Grant. This one-time lump sum grant is intended to provide financial assistance for an unexpected, unreimbursed expense. The money is paid directly to the vendor/service provider.

Completed applications are to be sent to NYSRTA (directed to the DeCormier Trust,) 8 Airport Park Blvd., Latham, NY 12110-6414.

c. The Mary C. Spellissy Memorial Fund provides a lump sum grant to a past or present Friendly Service Worker who is in need of financial assistance. Contact the Association office or the Vice President for Friendly Service for an application.

What may seem like wasted space in this spot is intended to provide integrity to the material on the pages following.

## GENERAL INFORMATION RELATED TO FRIENDLY SERVICE

1. The fiscal year for NYSRTA is January 1 through December 31.
2. Every zone is sent \$200 yearly from the Association for Friendly Service activities. Matching funds of \$200 are to be allocated by the zone. After the initial \$400 has been expended, the zone may apply for three (3) additional \$200 grants as needed. A request application is completed by the Friendly Service zone chair, sent to the zone president to approve the request and forward the application to the Albany office. Each additional grant awarded must be matched by a similar amount from the zone.
3. Units often include monies for Friendly Service in their yearly budgets.
4. Units may raise funds for Friendly Service activities at their regular meetings.
5. Memorials to deceased members may be given by zones, units or by individuals to benefit the activities of Friendly Service.
6. Memorials to deceased members may be given by zones, units or by individuals to the Robert R. DeCormier Memorial Trust Fund. Checks, made out to the *Robert R. DeCormier Memorial Trust Fund*, are sent to the Albany Office with donor information.

Revised October 2011

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REQUEST FOR FRIENDLY SERVICE ALLOTMENT

ZONE \_\_\_\_\_

APPLICATION FOR – second, third, fourth (circle one) allotment of \$200

for Friendly Service work in the zone during the fiscal year July 1, \_\_\_\_\_ through  
June 30, \_\_\_\_\_.

Total expenditures to date for this current year:

From zone funds \$ \_\_\_\_\_

From Association funds \$ \_\_\_\_\_

Principal items for which these funds have been spent:

(List items – do not itemize)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date \_\_\_\_\_

Signed \_\_\_\_\_

Zone Friendly Service Chair

Approved by \_\_\_\_\_

Zone President

Zone President will send this approval to:

The New York State Retired Teachers' Association, Inc  
8 Airport Blvd., Latham, NY 12110-6414.

Approved \_\_\_\_\_

Date \_\_\_\_\_

NYSRTA Executive Office manager

A check for the Friendly Service Allotment will be sent to the Zone Treasurer.



THE NEW YORK STATE RETIRED TEACHERS'  
ASSOCIATION, INC.

*Friendly Service Committee*

Mary G. Spellissy Memorial Fund Grant Request Form

The Mary G. Spellissy Memorial Fund has been established to be used by Friendly Service personnel for their own health related or special needs. Grants of up to \$500 are available to any Association member who is a current or former Friendly Service worker in need of financial assistance. For consideration, complete this request form and mail to the Association's Vice President for Friendly Service.

Name \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_ Position held \_\_\_\_\_

\_\_\_\_\_

Unit \_\_\_\_\_ Zone \_\_\_\_\_

Amount Requested \$ \_\_\_\_\_

Proposed use

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Applicant's signature \_\_\_\_\_

Zone or Unit (County) Friendly Service Signature \_\_\_\_\_



## “The Friendly Service Fund”

### Definition and Purposes

The Friendly Service Fund is a principal amount consisting of bequests and donations made by NYSRTA Members for the purpose of advancing the work of NYSRTA’s Friendly Service Program. Presently (2011), this principal amount is approximately \$100,000, and is invested with Smith Barney Associates for the purpose of generating annual revenue to fund Friendly Service Activities. Future donations to this fund will increase the size of the invested principal to generate greater revenue for the program, unless otherwise designated by the donor.

The annual earnings of the Friendly Service Fund will be dedicated to the work of Friendly Services in the following manner:

**First**, to pay the expenses of handling the Friendly Service fund.

**Secondly**, to fund the stipends to the individual Zones for funding their Friendly Service work for NYSRTA Members.

**Thirdly**, to fund “Special Grants” to NYSRTA Members who have a one-time special need. (Such as having a furnace fixed, a roof replaced, or other emergency attended to.) No such special grant shall exceed a total amount of \$1000.00, nor will the total of the grants given in any one year exceed the annual earnings generated by the Friendly Service Fund through the investment of its principal amount minus the fund expenses and stipends to the Zones. (The principal amount will remain invested to generate future earnings.)

Applications for grants exceeding the limits outlined in the preceding paragraph may be referred to the DeCormier Trust for evaluation.

Evaluation and award (or denial) of these special Friendly Service Grants will be the responsibility of the Friendly Service Committee under the general supervision of the NYSRTA Executive Board. Before any award is paid, the President and Treasurer of the Association must sign-off on each grant to assure the criteria for award, as outlined above, have been met.

Friendly Service Workers may use the form on the following page to refer an applicant for a grant.

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The New York State Retired Teachers' Association, Inc.  
*Friendly Service*

8 Airport Park Blvd., Latham, NY 12110-6414  
(518) 482-3509 Fax: (518) 482-0970  
E-mail: [rtaoffice@nysrta.org](mailto:rtaoffice@nysrta.org) Web site: [www.nysrta.org](http://www.nysrta.org)

**APPLICATION FOR SPECIAL GRANT**

This is a lump sum offered, to Association and spousal members in financial need, to provide financial assistance for an unexpected, un-reimbursed expense.

Name \_\_\_\_\_

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Telephone \_\_\_\_\_

Date \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_

Are you a member of NYSRTA? \_\_\_\_\_ Zone \_\_\_\_\_

Unit \_\_\_\_\_

Are you receiving Medicaid assistance? (circle) Yes / No Yearly income

\_\_\_\_\_

Total un-reimbursed expense? \_\_\_\_\_ Amount requested? \_\_\_\_\_

Describe the proposed use of the funds requested (use reverse side if necessary):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Why would it be difficult for you to finance the proposed request out of your own income, assets or through family assistance?  
(use reverse side if necessary):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Attach documentation from the vendor(s) regarding the expected cost of your service(s). A receipt showing proof of payment will be required after the service(s) has been completed.**

Mail the completed application and cost estimate to:  
*Friendly Service , NYSRTA, 8 Airport Park Blvd., Latham, NY 12110-6414.*