NATIONAL EDUCATION ASSOCIATION nea.org

Great Public Schools for Every Student

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 Organziation does not exist, NEA-Retired will receive and review grant proposals that seek to establish a State Retired Organziation. 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: *Increased Membership and Participation Through Strategic Planning*

DATE OF SUBMISSION TO NEA-RETIRED: *2/8/10*

NAME OF STATE AFFILIATE: *Arizona Education Association*

ARE YOU APPLYING FOR A ONE YEAR GRANT OR A TWO YEAR GRANT? ☐ 1 Year X☐ 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: *Linda A. Somo*

Complete Address: *4240 E. Hope St., Mesa, AZ 85205*

Telephone Number: *602 574-1473* Email: *lsomo@cox.net*

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

State Affiliate Executive Director: *Sheryl Mathis*

Telephone Number: *602 264-1774* Email: *sheryl.mathis@arizonaea.org*

State Affiliate Active President: *John Wright*

Telephone Number: *602 264-1774* Email: *John.wright@arizonaea.org*

State Affiliate Retired Staff Liaison: *Michael Aicone*

Telephone Number: *602 264-1774* Email: *Michael.aicone@arizonaea.org*

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: Desecribe the project's scope and purpose in two or three sentences.

Through a Strategic Planning Process, AEA-Retired Board members will implement creative new ways to reach out to active members, retired members, potential members, and community members that will recruit, inform, educate and mobilize. AEA-Retired will purchase recurring ads in the state magazine The Advocate to advertise the retired association, conduct a member recruiting campaign at the state Delegate Assembly and other AEA gatherings, continue recruiting throughout the year with direct mailings to potential members, provide recruitment posters advertising AEA-Retired at all worksites where AEA has a presence, train & support Chapter Chairs to help them expand and grow local chapters throughout the state, increase the use of technology with members, and help to recruit active members for local associations.

WHO WILL BENEFIT FROM THE PROJECT?

AEA-Retired, AEA, Arizona's children, public schools and general population.

WHO WILL BE INVOLVED IN THE PROJECT?

AEA-Retired members, active members, and community members.

PROGRAM OBJECTIVES: Describe the anticipated results of the project.

1. *Increased visibility for AEA-Retired and AEA in general*
2. *Increased membership for AEA-Retired and active AEA membership*
3. *Increased awareness and political action activities by AEA-Retired members and supporters of public education*
4. *Dissemination of information through increasing use of E-Newsletters, social networks and electronic surveys to support public education and the Association*
5. *Increase chapter membership and participation*

METHODS: Describe each step of the process you will use to implement the project.

AEA-RETIRED has pursued a Strategic Planning process in response to a collective revised vision, and to deal with changes influenced by the external environment: a large group of soon-to-be retired education employees, statewide budget cuts to education and revamping of health benefits which indicate that retirees who are eligible will choose to retire in larger numbers over the next 5 years. We are considering innovative new programs which will aid the active AEA members in their goals. These include creating and making presentations throughout the community in order to educate voters about the relationships of T.E.F., member-recruitment in school districts, deep outreach to our own members, and strengthening local chapters of our geographically large state in order to help local chapters meet the needs of individual members and help them develop capacity to meet the needs of a growing membership.

We have high intellectual capital to fulfill our goals: many of our members were association leaders in their own active locals. We have a committed board team who have attended strategic planning sessions outside of our own meeting times, and have laid a framework for achieving measurable goals in three areas: 1. Strengthening chapters; 2. Outreach to potential members and active associations; 3. Political engagement and power. These activities are over and above our organization's ongoing activities. We need to continue to plan, refine, and implement our strategies for fulfilling these goals.

Year One:

1. *Two -day Strategic Planning Session in September, 2010 for all AEA-Retired Board Members, Chapter Chairs and Committee Chairs*
2. *Develop powerpoint presentations for memberhip recruitment; political action activities; community information presentations (to get public support for quality public education); training modules for chapter chairs; training modules for use of electronic social networks; leadership training for members*
3. *Conduct membership campaign at AEA Delegate Assembly, AEA Leaders Conference, and other conferences; develop and run membership recruiting ads in AEA publications; print and send personal invitations to join to all recently retired AEA members; develop, print and disseminate recruitment posters for all work sites where AEA has a presence*
4. *Expand AEA-Retired's electronic social network of members and email list of members; use Mailchimp and Survey Monkey to conduct surveys of members as part of monthly E-Newsletter; expand readership of E-Newsletter; add additional issue of print newsletter, The Conduit, yearly (change from 4 to 5 issues yearly)*

Year Two:

1. *Train cadres of retired members to be presentors of specific presentations: pre-retirement, TEF (Taxes, Economic Development, and Funding for education), memberhip recruitment, political action, community awareness*
2. *Support all chapter chairs by providing training and materials which will assist them in their efforts to expand and lead chapters*
3. *Provide presentations to AEA local affiliates, community organizations, retired groups, and retired members*
4. *Train retirees and implement a program of volunteers who will work with 1st year teachers at beginning of school year to help set up classrooms, and use the opportunity to recruit membership in the local active association*

SUCCESS CRITERIA: How will you know your grant was successful when it is complete?

1. *Membership for AEA-Retired will increase by 10%*
2. *AEA-Retired members' participation in political action activities and chapter activities will increase by 20%*
3. *AEA-Retired will have a higher visibility among active members, retired members, and in the community*
4. *Membership and participation in chapters will increase by 15%*
5. *Members who are accessible by email and/or electronic social networks will increase by 25%*
6. *Retirees who volunteer to help beginning teachers set up classrooms will be successful in signing new members for the active local 50% of the time*
7. *Sufficient AEA-Retired members will be trained and ready to assume all leadership positions*

BUDGET

DESCRIPTION OF PURCHASES	AMOUNT
Two day Strategic Planning Meeting	$1700
Mailchimp & Survey Monkey (cost for two years)	$1600
Posters and letter printing	$200
Postage, Recruitment Ads, Membership Campaign materials, (reception & happy hour for actives at Delegate Assembly and other functions)	$1500
Travel expenses & materials for presentors and volunteers	$2000
Training for presentors , volunteers, and potential leaders	$1500
Materials & training for Chapter Chairs	$500
One additional issue of The Conduit	$1000
	$
	$
Subtotal:	***$***
OTHER FUNDING SOURCES (to be subtracted from subtotal):	($)
TOTAL AMOUNT REQUESTED FROM NEA-RETIRED GRANTS: (cannot exceed $5,000 per year)	**Year 1: $5000** **Year 2: $5000**

GRANT WRITER SIGNATURE: _____ **DATE:** *2/8/10*

RECEIVED BY NEA-RETIRED: _____ **DATE:** _____