Vision for Tomorrow…AEA-Retired "Next"
Results of Board Input

1. **Who should be involved in strategic planning? Who should be invited to the retreat to participate in strategic planning for AEA-Retired?**
   Local members; chapter members; every AEA-Retired member, none should be left out of the invitation; anyone who is interested; officers, board members, chapter chairs; new AEA-R members (just retired), as well as new BOD members for newer ideas – added to officers; AEA-Retired officers, local presidents, new retirees, Board members, cross section; officers, Board, chapter reps; a committee made up of representatives of officers, board members & chapter chairs, & members at large; invite anyone wishing to participate who contributed some time during past year; board & chapter reps; AEA-R Board, recent/past board members – anyone; all interested; AEA staff, Retired national staff, local chairs, established retired groups; officers, Board members, chapter leaders, staff liaison, established retirement groups w/insight on strategic planning; AEA officer or BOD member, chapter chairs, members; officers & reps; AARP; officers & Executive Board members, committee chairs & members, AEA-R liaison, NEA-R; Ex. Bd., members, chapter chairs, AEA BOD, active members; any member of AEA-Retired; any interested member of AEA-R, staff liaison, Board, members at large, chapter chairs, outside retired group members
   <u>Summary:</u>
   1. Most wanted all AEA-Retired members who were interested in participated.
   2. Other mentions: Established retirement groups; Members of Coalition organizations; a Committee composed of leaders

2. **What topics should be included in strategic planning for the future of AEA-Retired? What kinds of things, what areas, do we need to cover as we engage in planning for AEA-Retired's future?**
   Future planning; strategies around ASRS/legislation; political action grassroots building for 2010; aligning our goals/values; membership drives w/Boomers who are retiring; using expertise of our members, engaging them in opportunities; membership – goals? How to get there? How to use e-mail more effectively? Mandatory dues deduct as opposed to cost of mailings (renewals)?; We have in the past covered and funded all grants received from NEA. Will we be able to continue this? Budget – what is (?) to us? Involvement of membership – how do we capture those retirees?; how to set up "grass roots" groups for involvement in action, legislation, etc.; a plan for making us more visual – more of a force in community; how to meet the needs of members based on communication – pensions – insurance benefits; increase membership; what to do for those who can't get out; develop locals, chapters; budget allocation; more bottom-up grass roots involvement; chapters budget; how to increase membership; are your needs being met by AEA; how to meet needs of members based on community; membership – how to meet needs of members – communication, changes in health care, benefits, pensions, chapters, finances of AEA-Retired; suggestions to budget of AEA-Retired; strategies to increase membership; meet needs of members re: health care, increase of benefits, increase of locals; suggestions for budget; contact active locals; budget, goals, membership; Conduit online; increase membership; identify needs of members; increase chapters; build a positive relationship w/AEA; provide resources; information; opportunities for service; online mentoring system; social opportunities; dues – types of activities to incorporate to grow membership; membership strategies, common chapter activities, funding of projects; legislative, vision, mission, goals, communications, history of AEA-Retired, working

relationships with actives; education / social, tax/financial planning for the retiree, medical situation/availability, death & dying (hospice/retirement house/assisted living); some history discussions, how do we involve more people, should we continue applying for grants, if so will it help us grow; goals, objectives, mission; membership, member involvement, develop new chapter & new topics for presentations, ASRS, health insurance, funding; legislative program, working relationship with active locals, history, wellness programs, health insurance; continued work with ASRS; working with active local AEA groups; ASRS, communication, membership, IMPACT, legislative, history, mission vision goals & objectives, working relationships with active locals, outreach to older members, continuity with local chapters, needs of our members

Summary:

1. Future planning/vision/mission/goals/history/ Aligning goals/values
   - Working relationship with AEA.
   - Relationship with active locals
2. Legislative/Political organizing 2010/ASRS/ grassroots, bottom up organizing
3. Membership Drive/recruitment/strategies to increase membership
   - Mandatory dues deduct
   - Involving those who are homebound/outreach to older members
   - Are their needs being met, community; Identifying needs of mbrs
   - Engaging members' expertise/opportunities/effectively/involvement of
   - Education/social/tax & financial planning/medical situation, availability, death & dying (hospice, retirement house, assisted living/
   - Involve more members
4. Communications
   - Using Email more effectively
   - pensions, insurance benefits (what's in it for me?)
   - Conduit on-line
   - Making AEA-R more visual/brand/Force
   - Develop new presentations.
5. Budget/Allocation/ Fundraising for Grant continuation/ Should we apply for more grants – if so, will it help us to grow?
6. Chapters
   - Develop locals, chapters, Chapters Budget/ increase chapters/ build positive relationship with AEA, provide resources, dues – types of activities to incorporate, funding of projects.

3. What Expectations/Outcomes do you envision as the result of this type of summer leadership retreat for strategic planning for the future of AEA-Retired?

AEA-Retired values need to be reflected in everything the Association does…to be an active word in our newsletter (National Guard analogy); using expertise of our members, engaging them in opportunities; increased membership; better communication; savings; more members, clearer budget; more involvement; more people with…; have goals set, short & long range; find out what members want, maybe done at Annual Meeting before summer, or do in Conduit; try more on-line items; outreach, survey; plan for recruitment, chapters; a plan for AEA involvement/support; find out what members want – Annual Meeting set goals; find out what members want (survey); set goals (short & long range); survey; clear vision, defined goals, align the budget; blueprint to guide us, as a group, to specific outcomes re: membership, finance, public outreach (Michigan 3 year goals); better relationships & ties with locals; how to continue to grow & build membership; development of strategic budget; information; better communication among members; continued growth in membership; continued active

involvement in AEA/NEA/NEA-Retired; direction; get the word out to become involved and to grow with AEA-R; better communication, strategic budget – mission statement, goals & actions; stronger tie in with local AEA; find out what are important areas to spend our dues money; stronger tie in with the locals; how do we continue growing

Summary

1. Values reflected in which everything AEA-Retired engages
    - Goals, mission, short and long range, clear vision
    - Blueprint to guide us, to specific outcomes re: membership, finance,public outreach
    - Continued active involvement in AEA/NEA/NEA-Ret.
    - Stronger tie-in with local AEA
    - How do we continue to grow
2. Ready to be "called to action" when needed – as many members as possible
    - We use more expertise of our members/engaging more members
3. Increased membership
    - Outreach/plan for recruitment/Chapters – plan for AEA involvment, support
4. Better communication
    - Survey membership for goals/ more on-line communication/
    - Better communication among members,
5. Budget: Savings, more members, clearer budget, Align the budget