

University of Texas Retired Faculty-Staff Association Position Descriptions for Board Members

The Constitution and Bylaws of the University of Texas Retired Faculty-Staff Association broadly address some Board positions, as below:

From RFSA Constitution

Article IV. Meetings

The Association will have at least two general membership meetings per year, one in the fall and one in the spring. The spring meeting is the annual business meeting.

Section 1. Elections

Executive Officers are approved by a vote of the RFSA membership at the spring meeting. An unexpected vacancy of an Executive Officer position may be filled on a temporary basis by the Executive Committee, but any permanent replacements must be voted on by the full Association at the spring meeting.

Section 2. Presiding Officer

The President shall serve as Chief Executive Officer of the Association and shall preside at all meetings of the Association, including the general membership, the Executive Committee, Administrative Officers and the full Board. The President-Elect shall perform the duties of the President in the event the President is unable to preside.

Article V. Composition of the Board

The RFSA Board consists of the Executive Officers, Administrative Officers and Interest Group Chairs.

Section 1. Officers

The Executive Officers of the Association are the President, President-Elect, Immediate Past President, Secretary, Treasurer, Historian and four Members-at-Large. One of the Members-at-Large shall be a representative of The University of Texas System. The Executive Officers comprise the Executive Committee.

The Administrative Officers of the Association provide administrative leadership for official functions of the Association, including publications such as the magazine and website, membership, the scholarship fund, business sponsorships, and any other administrative areas designated by the Executive Committee. All officers have one vote on the Board.

Section 2. Interest Group Chairs

Interest Groups are responsible for planning and execution of ongoing programs and activities of the Association. Interest Groups and Chairs are set annually by a vote of the Executive Committee. Each Interest Group is entitled to one vote on the Board.

Section 3. Terms of Office

The terms of the President, President-Elect and Immediate Past President shall normally be one calendar year. The terms of the Secretary, Treasurer, Historian and Members-at-Large shall be three years, with Members-at-Large serving three-year staggered terms.

Section 4. Ex-Officio and Honorary Members

The Board may honor an outgoing officer who has provided exemplary service to the Association by designating that person as an officer emeritus/emerita. Those positions will not have a vote on the Board.

Article VI. Committees

Section 1. Executive Committee

The Executive Officers listed in Article V, Section, shall constitute the Executive Committee, which may transact business in the name of the Association.

Section 2. Nominations Committee

The Nominations Committee will be chaired by the Immediate Past-President, with other members appointed by the President. The Nominations Committee shall submit a slate of nominees for any RFSA Board position. The slate of nominees for Executive Officers will be voted on by the full Association membership at the spring meeting. Administrative Officers and Interest Group Chairs will be approved by the Executive Committee and announced at the spring meeting.

Section 3. Other Committees

Other committees may be established by the President, with approval of the Executive Committee. Those committees may be ad hoc, advisory or long-term.

From RFSA Bylaws

Article III. RFSA Board

Section 1. *Should the office of President become vacant, the President-Elect shall immediately become President, serve out the remaining term of his or her predecessor and the entire term to which she or he was elected.*

Section 2. *Nominations for Executive Officers, Administrative Officers and Interest Group Chairs will be submitted by the Nominations Committee. The Nominations Committee shall be chaired by the Immediate Past-President and shall have at least two other members appointed by the President. The President and President-Elect shall also serve on this committee.*

Section 3. *The Members-at-Large positions shall be identified as Member-at-Large 1st Year; Member-at-Large 2nd Year; Member-at-Large 3rd Year; and Member-at-Large UT System. Every Member-at-Large will serve for three years. The UT System Member-at-Large will maintain that classification the full three years. The other three Members-at-Large will rotate through the 1st Year, 2nd Year and 3rd Year designations. All Members-at-Large may be elected to a second three-year term.*

Section 4. *Job descriptions for all Executive Officers, Administrative Officers and Interest Group Chairs are available on the RFSA website or by request to the RFSA Administrator.*

Section 5. *Emeritus/Emerita Members (honorary). Exceptional RFSA Officers may be granted emeritus/emera status as a non-voting member of the Board. They are not required to pay dues. This honor is bestowed by the RFSA Board and is a lifelong appointment. They may be listed with the Board as Emeritus/Emerita members.*

Article V. Meetings *The RFSA President may call meetings of the RFSA Executive Committee, Administrative Officers, and Interest Group chairs which comprise the RFSA Board and any subset thereof. The President may call meetings of any ad hoc, advisory or long-term committee.*

Article VI. Committees *The President, with the approval of the Executive Committee, shall appoint persons to any committees, including ad hoc or advisory, and/or to positions as may be necessary to conduct the business of the Association.*

Attached are position descriptions for all Board members, including those mentioned above.

RFSA Board

Executive Officers, comprising the Executive Committee:

President
President-Elect
Immediate Past President
Secretary
Treasurer
Historian
Project Manager
Members-at-Large (4)

Administrative Officers:

IT/Webmaster
Magazine Editor
Membership Chair
Photographer
Scholarship Chair
Special Programs Chair
Sponsorship Chair
Travel Chair

Interest Group Chairs:

Arts and Culture
Bridge
Exercise
Foodies
Speaker Series

Institutional Support & Coordination

Provided by the UT Ex-Students' Association

Carol Barrett has held this position since RFSA was moved out of the Office of the President in 2003. She will be referred to as our Institutional Liaison in the position descriptions.

President
Executive Officer, UT Retired Faculty-Staff Association

General responsibilities:

- Preside at all meetings of the general membership (the spring and fall luncheons) and at all Board meetings;
- Work closely with other RFSA officers and staff of the Texas Exes to provide direction or assistance with the operations of the organization; and
- Serve as the primary representative of RFSA to the University community and any other outside constituencies.

Specific responsibilities, events and timeline:

Summer

- Schedule Board meetings for the summer and fall and reserve meeting rooms in the Ex-Students Association building. Those reservations are made through Carol Barrett, RFSA's Institutional Liaison. Meetings can be for the full Board, or subsets of the Board including Executive Officers, Administrative Officers, and Interest Group Chairs. Notify Board members of the dates for those meetings so they can be held on calendars.
- Call for agenda items approximately two weeks before any scheduled meetings.
- Work with the Institutional Liaison and Immediate Past President to learn responsibilities. Include President-Elect as appropriate.
- Schedule Fall Luncheon meeting date, if possible, and share it with Board members. Our Institutional Liaison works with the Office of the President to schedule those dates.

September

- Our Institutional Liaison gets new retirees list from HR, then sends new retirees a letter from the RFSA President inviting them to join and attend the Fall Luncheon.
- Our Institutional Liaison sends renewal notices to current RFSA members when their memberships expire (this is an ongoing task through the year.)
- Schedule Fall Luncheon meeting date if that could not be done in the summer. Finalize details for Fall Luncheon – menu, speaker, entertainment, guests such as UT Outpost, ID Center, other UT departments, RFSA sponsors who want to have a table, etc. Our Institutional Liaison works with UT President's Office and RFSA President to create invitation to Fall Luncheon. Select luncheon buffet menu. Remind Scholarships Chair and Sponsorships Chair to provide names to our Institutional Liaison to add to the invitees list.
- When date/speaker/details are set, send "save the date" email to RFSA members and ask our Webmaster to place on website.

October

- President's Office sends Luncheon invitations and collects RSVPs several weeks before date.
- Our Institutional Liaison will provide script from last fall meeting for your revisions, then will print and make copies for Secretary, President-Elect, others as needed.
- Work with our Institutional Liaison to determine reserved seating for sponsors, scholarship recipients, speakers, etc.
- After Luncheon, send thank you notes to Office of the President, sponsors, speaker, etc.
- Schedule date and reserve facility for Holiday Party, with our Institutional Liaison (early to mid-October).

- Plan details for Holiday Party, including menu and entertainment. Ask Webmaster to place on website. Send a “save the date” reminder to all members.

November

- Write “Message from the President” column for fall/winter magazine. Provide headshot or ask RFSA Photographer to take photo for the article.
- Work with Institutional Liaison to send invitation for Holiday Party to all members.
- Appoint two members to serve on RFSA Nominations Committee.

January

- Schedule Board meetings for the spring. Those meetings can be for the full Board, or subsets of the Board. Notify Board members of the dates for those meetings so they can be held on calendars.
- Schedule Spring Luncheon meeting date.

February/March

- Finalize details for Spring Luncheon – menu, speaker, entertainment, guests such as UT Outpost, ID Center, etc. Our Institutional Liaison works with UT President’s Office and RFSA President to create invitation to Spring Luncheon. Remind Scholarships Chair and Sponsorships Chair to provide names to Institutional Liaison to add to the invitees list.
- When date/speaker/details are set, send “save the date” email to RFSA members and ask IT/Webmaster to place on website.

March/April

- President’s Office sends Luncheon invitations and collects RSVPs several weeks before date.
- Our Institutional Liaison will provide script from last spring meeting for your revisions, then will print and make copies for Secretary, President-Elect, others as needed.
- Work with Institutional Liaison to determine reserved seating for sponsors, scholarship recipients, speakers, etc.
- After Luncheon, send thank you notes to Office of the President, sponsors, speaker, etc.
- Write “Message from the President” column for spring/summer magazine.
- Coordinate with Institutional Liaison and other officers to select a thank-you gift for the outgoing President, to be presented at the Luncheon.

Ongoing

- Approve minutes for all meetings and ask Webmaster to place on website.
- Request agenda items from Board members for any scheduled meetings.
- Write thank you notes as needed.
- Send copies of the magazine to relevant individuals or offices. Those might include the Office of the President, UT System Chancellor, any individuals or offices highlighted in magazine, etc.
- Review and revise all printed and electronic RFSA materials, as needed.
- Serve as a member of the RFSA Executive Committee and Board.

Note: This timeline of responsibilities was prepared by Past President Peggy Mueller on May 15, 2015. It has been revised and supplemented by other former Presidents.

President-Elect
Executive Officer, UT Retired Faculty-Staff Association

General Responsibilities

The President-Elect will work closely with the President to learn more about RFSA and the issues currently impacting the organization.

Specific Responsibilities

- Perform the duties of the President in the event the President is unable to be present or perform the responsibilities.
- Serve as a member of the Nominations Committee.
- Work on special projects assigned by the President.
- Serve as a member of the RFSA Executive Committee and Board.

Immediate Past President ***Executive Officer, UT Retired Faculty-Staff Association***

General Responsibilities

The Immediate Past President will provide information and assistance to the incoming President to facilitate a smooth transition.

Specific Responsibilities

- Write a monthly update to members (“News for you from UT’s Retired Faculty-Staff Association”) to be disseminated via email to all RFSA members under the signature of the RFSA President.
- Prepare a calendar of dates relevant to the election and selection of new RFSA Board members. Present it to the RFSA President to disseminate to the general membership and invite members to submit nominations. These actions are to facilitate compliance with *RFSA Bylaws, Article IV. Elections and Voting*
- Chair the Nominations Committee and meet with that group in the late fall or early spring to select nominees for vacant Board positions. The Committee shall develop a prioritized list of potential nominees for each position, contact those individuals to explain the responsibilities for the office and ascertain interest from the individual. The final list of nominees for any vacant Executive Officer positions shall be voted on by the general membership at the spring meeting. Vacancies of Administrative Officers and Interest Group chairs can be approved by the Executive Committee and announced at the spring meeting, but do not require a vote of the general membership.
- Write the “Meet Our New Board Members” article for the spring RFSA Magazine, working with the Magazine Editor to determine parameters, such as word count.
- Create an RFSA Annual Report, which shall be made available to all members. Request an annual summary of events, participants, and any other relevant data from all Board members (typically in October), then compile the Annual Report (usually in November, to meet magazine publication deadlines.) A copy of this report will be provided to the Historian for the RFSA archives, to the Magazine Editor for the publication in the Fall/Winter issue of the RFSA Magazine, and posted on the website.
- Serve as a member of the RFSA Executive Committee and Board.

Secretary
Executive Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Secretary will take minutes at Board meetings and Association meetings/luncheons.

Specific Responsibilities

- Take minutes at the two annual RFSA business meetings/luncheons and at any Board meetings.
- Send those minutes to Board members for any corrections and approval.
- After approval, submit those minutes to the IT/Webmaster to be posted on the RFSA website.
- Serve as a member of the RFSA Executive Committee and Board.

Treasurer
Executive Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Treasurer is in charge of the financial transactions of the Association, maintaining the financial records, and preparing an annual budget.

Specific Responsibilities

- Prepare an annual budget for RFSA operations.
- Coordinate oversight for expenditures.
- Ensure compliance with the RFSA Financial Guidelines. *
- Work closely with staff in the Ex-Students' Association who maintain and process all transactions through the UT Accounting system for the RFSA Operations account and Scholarship Fund.
- Prepare an annual summary of income and expenditures, typically in October or November. Submit the report to the Immediate Past President who will prepare the RFSA Annual Report which is published in the Fall/Winter RFSA Magazine.
- Serve as a member of the RFSA Executive Committee and Board.

***RFSA Financial Guidelines**

The RFSA has two primary accounts, the operations account and the scholarship fund. All transactions in the operations account are handled by the Ex-Students Association accounting staff. The UT Development Office maintains the RFSA scholarship fund. The UT Office of Scholarships and Financial Aid selects scholarship recipients and makes the awards.

Operations account: Expenditures for budgeted items

Expenditures for budgeted items are routine expenses and should be processed by the Institutional Liaison.

Operations Account: Expenditures for non-budgeted items

- Expenditures up to \$100 may be approved by the RFSA Treasurer
- Expenditures between \$100 and \$500 may be approved by the RFSA President and Treasurer.
- Expenditures in excess of \$500 may be approved by the RFSA Executive Committee.

RFSA Operations Account: Reserve Fund

The RFSA Executive Committee approved the establishment of a RFSA Reserve Fund at their November 18, 2019 meeting. The RFSA Reserve Fund was created to cover unanticipated expenses such as mailings, room reservation costs, special programs, etc. This Reserve Fund was established by a \$1,000 transfer from the RFSA Operating Account during the 2019-2020 fiscal year. That \$1,000 amount will become an annual recurring line-item expense in the Operating Budget.

Expenditures from the Reserve Fund:

- o Expenditures up to \$500 may be approved by the RFSA President and Treasurer

- Expenditures in excess of \$500 may be approved by the RFSA Executive Committee
- Budgeted expenditures are routine expenses which may be processed without further approvals.

Operations Account: Year-End Balance

When the year-end balance at the end of any RFSA fiscal year exceeds \$25,000, the amount in excess of \$25,000 will be transferred to the Scholarship Fund maintained by the UT Development Office and used by the UT Office of Scholarships and Financial Aid in making RFSA Scholarship Awards.

Historian
Executive Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Historian is responsible for gathering and maintaining the archives of the Association.

Specific Responsibilities

- Compile a record of deaths of UT Austin and UT System retirees and their spouses/significant others. Utilizing various sources to compile this record, including UT departments, local newspapers, university-affiliated social organizations or any other appropriate resources. This record should include names, departments and dates of death, and should be provided to the RFSA Magazine Editor to meet publication deadlines.
- Collect and organize all RFSA publications and other relevant materials. These materials should be organized chronologically for the Archives of the Association. Items to be archived should include magazines, brochures and any other items created by RFSA; the Annual Reports; correspondence sent to members; any mentions about RFSA in articles; outreach efforts such as advertising in “Texas Connect”; and any other documents deemed to be relevant to the history of RFSA. The Historian may work with the Institutional Liaison to collect copies of emails sent to the membership or any other materials appropriate for the archives.
- Serve as a member of the RFSA Executive Committee and Board.

Project Manager
Executive Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Project Manager will coordinate special projects of the Association's President and Executive Committee, as well as provide assistance to the Institutional Liaison with RFSA tasks.

Specific Responsibilities

- Manage specific tasks requested by the President or Executive Committee, such as updating Board members' position descriptions and follow-up on events such as Table Topics (member feedback session held during an RFSA luncheon meeting.)
- Work with the Institutional Liaison on RFSA tasks, such as drafting or proofing communications, generating reports, and assistance on special events.
- Serve as a member of the RFSA Executive Committee and Board.

Members-at-Large

Executive Officers, UT Retired Faculty-Staff Association

General Responsibilities

Members-at-Large provide advice and counsel to the RFSA President and Executive Committee, and provide leadership or assistance with programs and special projects as requested by the President. The UT System Member-at-Large position will have the same responsibilities as the other Members-at-Large but will focus on retirees and events of the UT System.

Specific Responsibilities

- Represent RFSA at events such as UT's Health Expo, Human Resources retirement sessions, and the faculty "Do you want to retire?" seminars.
- Assist the President or other officers with projects for the RFSA membership.
- Serve as a member of the RFSA Executive Committee and Board.

IT/Webmaster
Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The IT/Webmaster Chair is responsible for the creation, maintenance and updates of the RFSA website and the RFSA Facebook page, with the goal of keeping those sites updated with the most current information at all times and continuously improving the site to make it easy and enjoyable for members to use.

Specific Responsibilities

- Update website by posting photos of RFSA events; posting information about upcoming events and calendar items; and taking down calendar items from past events.
- Create pages on website for new events, as needed.
- Maintain archives of all photos and RFSA Magazines for historical purposes.
- Approve requests from members to post on the Facebook page by checking names to ensure the requestor is a member of RFSA.
- Post photos and commentary from RFSA events on the Facebook page.
- Serve as a member of the RFSA Board.

Magazine Editor

Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Magazine Editor determines content and layout of the RFSA Magazine published twice per year, edits submitted articles, and works with staff at the Texas Exes to have the magazines printed and mailed to members.

Specific Responsibilities

- Plan content for magazine. Ask individuals to write any special articles.
- Set schedule for all phases of magazine publication. This includes deadlines for submission of articles, printing and mailing dates, and scheduling time (if needed) to work with Texas Exes publications staff or staff with the printing/ mailing subcontractor.
- Obtain camera-ready advertisements of RFSA sponsors from the Institutional Liaison.
- Notify Board members of article deadlines for their submissions, then send reminders approximately one month before article is due.
- Obtain photographs for magazine from the RFSA Photographer and others who have taken photos at events. Caption those photos and credit photographer.
- Serve as a member of the RFSA Board.

Note: The Magazine Editor may also select an Assistant Editor to assist with all aspects of the magazine. If there is an Assistant Editor, that person will also be an Administrative Officer and full member of the RFSA Board.

Membership Chair

Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Membership Chair is responsible for selecting members and directing activities of the Membership Committee, providing information to current and prospective RFSA members, and increasing the number of RFSA members.

Specific Responsibilities

- Work with the Institutional Liaison and staff from UT Human Resources to include information about RFSA in the “Retiring From UT” sessions.
- Work with the Institutional Liaison to ensure that RFSA has a table at the two Benefits Fairs, arrange for RFSA handouts at the table, and schedule Membership Committee members and Board members to staff that table.
- Arrange for a faculty retiree in RFSA to attend the Faculty Retirement Seminar, speak about the organization, provide handouts and answer questions.
- Assist the Institutional Liaison with writing and reviewing the annual letter to new retirees.
- Provide information to the RFSA Webmaster to add information and dates to the website.
- Write articles and submit photos about Membership Committee activities to the Immediate Past President for the monthly email update to members, and to the RFSA Magazine Editor.
- Post Membership updates to the RFSA Facebook page.
- Summarize all the membership data for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Photographer
Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Photographer attends RFSA events to take photos for the RFSA website, magazine, Facebook page, and other needs of the organization.

Specific Responsibilities

- Attend RFSA events, such as the Fall and Spring Luncheons, the Holiday Party, Interest Group meetings, and any other RFSA activities to take photos.*
- Distribute those photos to the Immediate Past President for the monthly email update to members, the Magazine Editor, and the IT/Website manager.
- Serve as a member of the RFSA Board.

**Note: The Photographer is not expected to attend all Interest Group meetings but should remind the Chairs to take photographs at their event. If the Photographer is unable to attend other RFSA events, he/she should find another member to fill in as Photographer at the events.*

Scholarships Chair

Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Scholarships Chair manages all aspects of the RFSA Scholarship Fund, including solicitations for the endowment and acknowledgements to the donors, interactions with the student scholarship recipients, maintaining records of donations, and collaboration with University departments involved in the scholarships process.

Specific Responsibilities

- Work with the Institutional Liaison and RFSA Board members to ensure that requests for donations to the Scholarship Fund are included in any RFSA publications, such as the magazine and website, as well as RFSA events and outreach.
- Maintain spreadsheets of donors and donations to the Scholarship Fund, including any Honorary and In Memoriam gifts. Send acknowledgement cards to donors, as well as to honorees or families of memorial gifts. *(Note: official acknowledgements to donors to be used for tax purposes are generated by the UT Development Office.)*
- Work directly with the student scholarship recipients by sending a congratulatory email that also includes a request for a photo and some personal information that can be shared with the RFSA membership in the magazine, on the website, and on a screen at the Fall and Spring Luncheons. Invite the scholarship recipients to the Fall and Spring Luncheons and the Holiday Party, greet them at the events, and sit at a reserved table with them.
- Provide a list of donors to the Scholarship Fund to the Magazine Editor, to be included in the upcoming issues of the Magazine.
- Prepare a report of gifts received, scholarships awarded, or any other matters concerning the Scholarship Fund. Present that information to the Board at Board meetings and general membership at Luncheons.
- Submit an annual report to the Immediate Past President to include in the RFSA Annual Report.
- If the RFSA Board has approved matching funds for scholarship donations, notify the Treasurer and other Board members when \$5,000 in donations has been reached so the Treasurer can authorize a transfer of those funds to the Scholarship Fund.
- Serve as a member of the RFSA Board.

Additional information which might be helpful to Scholarships Chairs, developed by Lael Hasty in 2024:

The RFSA Scholarship Fund Chair solicits scholarship funds through articles in the RFSA magazine and on the RFSA website; reports balances at Board meetings; works with UT Development and Texas Exes to obtain and maintain lists of donors and scholarship recipients; congratulates recipients and requests photos and information about them (if they are willing to provide information); invites scholarship recipients to fall and spring luncheon meetings (attendance is not required); acknowledges gifts from donors and to honorees; and supplies lists of same to RFSA Magazine Editor.

Responsibilities of the RFSA Scholarship Chair include:

- Solicitation of gifts: Requests for gifts are made in the RFSA magazine and on the RFSA website. Donation cards and envelopes are available at luncheons and are included in requests for annual membership dues that are sent by the Texas Exes. All scholarship gifts are deposited into an endowment account maintained by UT Austin that was established in 1983 and awarded the first scholarship in 1988.
- Receipt of gifts: Gifts are received either through the Texas Exes or UT Development. They may be made in cash, checks made payable to UT Austin or credit card (either written on blue donation card or online at the RFSA website or UT Giving website). Gifts made payable to RFSA or Texas Exes are recorded by the Texas Exes and deposited into their account, then a check is written to UT and sent to UT Development with appropriate information.
- Acknowledgement of gifts: The Chair will maintain spreadsheets of donors to the Scholarship Fund as well as any honorary or memorial gifts. Notification of gifts is sent from UT Development to Texas Exes and then forwarded to the Scholarship Chair. This can take some time to receive so at any given time the list may not be up to date. Occasionally notification of gifts made directly to Texas Exes may be sent directly to the Chair, which helps to expedite the acknowledgement process. It is therefore very important to watch for duplication of information when maintaining the lists of donors and gifts. The Chair will use the spreadsheets to send acknowledgement cards to donors as well as to honorees or families of memorial gifts if that information is included with the donation. Cards and envelopes are provided by Texas Exes. The wording on the cards is standard and only amounts, honorees or memorials are personalized. The chair may be reimbursed for stamps by Texas Exes. All donors will also receive notification from UT, since the monies are held in a UT endowment account, and that receipt is the official one that should be used for tax purposes.
- Scholarship distributions to students: Scholarship recipients are selected by UT's Student Financial Services office from the RFSA endowment fund. Student names and other pertinent information (if students agree to provide it) are sent to Texas Exes, who then shares with the Chair. Typically, 18-25 scholarship recipients will receive \$3,000 annually (updated from \$2,500 in 2024). Once the Scholarship Chair receives the names of the recipients each fall, the students are sent a congratulatory email from the Chair and asked to provide information (if they agree) and a photo that can be shared with the RFSA membership in the magazine, on the website and on a screen at the Fall/Spring Luncheons. Scholarship recipients are invited to the Fall and Spring Luncheons (attendance not required) and the Holiday party with an email from the Chair; and several students usually attend.
- RFSA Magazine: The Scholarship Chair will provide a list of donors and honorees (if available) to be published in the Fall and Spring magazines. The list is double-checked by the Institutional Liaison or other staff at Texas Exes to ensure that nobody is left off, as there can be gaps in the information received by the Chair from UT Development.
- Reports to Board and Membership: Reports on gifts received, scholarships awarded, and any other matters concerning the Scholarship fund should be made at Board Meetings. In addition, a report may be made at the general membership meetings/luncheons.
- RFSA matching funds: To increase donations to the RFSA Scholarship fund, the RFSA Board has occasionally approved an amount of funding from the RFSA Operating Account to be used as a match for any donations made to the Scholarship Fund. In 2019, \$30,000 was set aside by RFSA to provide that funding match. When a total of \$5,000 in scholarship contributions has been received by RFSA, the Scholarship Chair should request that a check from the designated scholarship account at Texas Exes be sent to the RFSA endowment held by UT Development to honor that matching funds agreement.
- Serving as a member of the RFSA Board.

Special Programs Chair
Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Special Programs Chair coordinates with the UT Office of University Events and Experience to offer volunteer opportunities for RFSA members for various official functions.

Specific Responsibilities

- Write a brief article for the monthly RFSA e-mail “blast” to remind members of upcoming donation opportunities with Orange Santa, 40 Hours for 40 Acres, or other events.
- Work with the Institutional Liaison to remind members to bring non-perishable food items to the spring RFSA luncheon to benefit UT Outpost, the campus food pantry.
- Summarize all the events for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Note: RFSA used to help make mementos for UT Remembers and donate gifts for Orange Santa, but changes in those programs have eliminated the need for volunteers. Orange Santa still requests financial donations, and we remind members of that opportunity.

Sponsorships Chair

Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Sponsorships Chair is the liaison between RFSA and our business sponsors.

Specific Responsibilities

- Work with the RFSA Board to determine which businesses might be invited to be sponsors, then reach out to the businesses to inform them of the benefits of sponsorship.
- Work with sponsors to determine the size of their ad in our magazine.
- Obtain camera-ready ads and business logos from the sponsors and provides them to the Institutional Liaison. The ads are published in our magazine, and the logos are included in any outreach to members, including emails and our website.
- Work with the Institutional Liaison to keep track of sponsors' ad payments, since most payments come directly to the Texas Exes.
- Keep in touch with sponsors throughout the year and invite them to attend the RFSA Luncheons and other appropriate events.
- Update the "Support Our Sponsors" article that is in each issue of the RFSA Magazine. If no changes are wanted/needed, the Magazine Editor will use the current article.
- Work with the Institutional Liaison to ensure that sponsors each receive the newest RFSA Magazine with a personal note and their ad flagged.
- Summarize all the sponsorship data for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Additional information which might be helpful to Sponsorships Chairs, developed by Cecil Martinez in 2023:

The RFSA Sponsorship Chairman performs a variety of duties that includes but is not limited to the following:

- Makes calls to prospective sponsors and makes appointments to inform prospects of the opportunities in sponsoring RFSA.
- Informs prospects of opportunities in advertising in our Fall and Spring magazines and our telephone directory. In addition, in Spring 2016, we started including Sponsors' links to our emails going to our members. This is really extra exposure (advertising) of their names and websites to our members.
- Sells the advertising in full or half page ads to prospective sponsors who are interested in supporting our organization. Current rates are \$1,000 full page and \$600 for half page ads.
- Obtains camera-ready advertisements from each of the sponsors and sends them to the Institutional Liaison.
- Receives advertisement payments from the sponsors and makes sure that the Institutional Liaison receives them so they can be recorded by the Business Office.
- Continues to keep in contact with sponsors throughout the year to inform them of our work and inviting them to attend our two luncheons so they can be recognized for supporting our association. Also, sends a letter along with each published magazine thanking them and flagging their advertisement in the magazine.

History of the Sponsorship Chairman, by Cecil Martinez

The foundation for this position started in the Fall of 2012 when RFSA was in a financial crisis where surplus funds were close to zero. President Deena Mersky asked the Board for ideas to solve the situation. After she received ideas, she formed a committee with Deena, President Elect Barbara Myers, Past President Peggy Kruger, Carol Barrett and Cecil Martinez to study the situation. Two main ideas came out of this committee.

- A program to solicit sponsors to advertise in our magazine and phone directory, and
- A raffle to sell tickets at the Fall and Spring Luncheons

When we first started soliciting sponsors, we approached businesses that would be a good fit for our members. In addition to being a good fit, the businesses had to be reputable and in good standing so our members would be confident that they would be getting the best goods and services from our sponsors at the best prices.

Additional goals in our soliciting of sponsors:

- We would solicit only one sponsor in each type of goods or services sold so that our sponsors would not have any competition for our members' needs. This was done to have good relationships with our sponsors and to keep them advertising with us year after year.
- We would limit the number of sponsors (10 sponsors) so that their ads do not distract from the interesting articles written in our magazines, yet the sponsors' ads could be viewed pleasantly by our members.
- The sponsorship income would keep our funds well above the zero balance. So far, sponsorship income has helped keep a healthy Operating Fund balance. In fact, we have donated funds to the Scholarship Fund. If the Operating Fund ever reaches an unhealthy balance, a decision will need to be made to increase sponsorship rate or to increase the number of sponsors.

Travel Committee Chair

Administrative Officer, UT Retired Faculty-Staff Association

General Responsibilities

The Travel Committee Chair works with the Travel Committee and travel agents to coordinate local, national and international trips and travel excursions for RFSA members.

Specific Responsibilities

- Propose travel destinations and gauge interest from RFSA members through surveys or other methods, then make recommendations for two or three trips per year to present to and be approved by the RFSA executive officers.
- Work with the Travel Committee and travel agents to plan details of those trips, then disseminate that information to members. This could include flyers available at RFSA events, an article in the monthly email to all members, notices on the website, or any other appropriate avenues.
- Attend trip information sessions hosted by the travel agent.
- Arrange for one or more RFSA Travel Committee members to go on each trip and serve as liaison for any issues that arise.
- Responsible for a Travel Committee article in every issue of the RFSA Magazine. This article should include information about upcoming trips, as well as a summary of trips taken since the last Magazine, including photographs. Work with the Magazine Editor to determine the parameters of the article, such as word count.
- Send photos and information to the Webmaster to post on the website. Post updates on the Facebook page. Provide information to the Immediate Past President for the monthly email to members. This may be delegated to a committee member or other RFSA member on the trip.
- Prepare display materials, brief travel presentations and be the onsite representatives for a Travel Information Table at each of the RFSA Luncheons.
- Prepare a summary about each trip, including the number of RFSA and non-RFSA travelers, financial agreements and issues, issues that arose from the trip and how they were resolved, and any other information that should be known by RFSA leadership. This report will also be placed in the archives.
- Ensure that the travel agent submits agreed-upon fees to RFSA.
- Coordinate all aspects of the Travel Committee, including setting meeting dates and locations and chairing the meetings. Manage the membership of the committee by finding replacement or additional members to serve on the committee.
- Summarize all the events for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Arts and Culture Committee Chair ***Interest Group, UT Retired Faculty-Staff Association***

General Responsibilities

The Arts and Culture Committee Chair should work with the Co-Chair and/or members of the committee to educate, coordinate events, and provide information to the RFSA membership about all aspects of the arts and culture, including music, dance, theater and art.

Specific Responsibilities

- Work closely with Co-Chairs and/or Assistant Chairs to develop and offer arts and cultural opportunities; ***or*** create a working committee of members interested or experienced in the various arts and cultural options which might be offered to RFSA members.
- Develop and maintain contact with the various UT departments and local organizations which provide public performances, shows and artwork. Stay active on their mailing lists.
- Disseminate information about those various organizations and departments and how to contact them by posting on the RFSA website, Facebook page, updates in the monthly email to members, and other appropriate avenues. Highlight specific events which our members might be interested in attending.
- Organize events for interested RFSA members. These events could include such things as purchasing group tickets for events and arranging tours at museums. Past events have also included group dinners before events, or chartering buses to attend out-of-town events.
- Maintain records of each event for the RFSA archives and provide that information to the Immediate Past President to be included in the Annual Report. Those records should include the number of attendees, travel arrangements, length of the event, or any other relevant information.
- Serve as a member of the RFSA Board.

Bridge Chair

Interest Group, UT Retired Faculty-Staff Association

General Responsibilities

The Bridge Chair coordinates all aspects of the monthly bridge players group.

Specific Responsibilities

- Maintain a list of all RFSA members who want to participate in the monthly bridge group, as well as members who do not want to play monthly but occasionally (alternates).
- Work with the Institutional Liaison to determine space availability in the Ex-Students' Association building and reserve that space. Disseminate the date and location to the bridge players. (That date has usually been the first Monday of the month but could also be the second Monday if the usual date conflicts with holidays or other issues.)
- The week prior to the bridge date, contact players to confirm if they will attend. Since players need to be groups of four, contact alternates or other bridge players to ensure all attendees can participate.
- Several days prior to the event, contact the Institutional Liaison so she can have the correct number of tables set up and bring the box of supplies to the room. The supply box contains cards, table covers, scoring pads, playing rules, individual tallies, pencils and name tags.
- Summarize all the events for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Exercise Chair

Interest Group, UT Retired Faculty-Staff Association

General Responsibilities

The Exercise Chair coordinates all aspects of the weekly exercise group meetings in Gregory Gym.

Specific Responsibilities

- Work with the staff at Recreational Sports to provide an Instructor who will lead the RFSA group, designed for all ages and fitness levels. Each group member will pay for their own membership to Recreational Sports as well as costs for that instructor.
- The sessions are scheduled for every Monday morning from 8:30 to 9:30. If there are any changes to that schedule, notify the members of the exercise group.
- Members may park in the Ex-Students' Association garage, but if certain events prohibit that free parking, the chair should notify members.
- Summarize all the events for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Foodie Chair

Interest Group, UT Retired Faculty-Staff Association

General Responsibilities

The Foodie Chair selects a restaurant and date for a meal, at least once per month, and makes all arrangements for members to attend.

Specific Responsibilities

- Maintain an email group of all RFSA members who have asked to be notified of Foodies events.
- Research local restaurants and ensure that they can accommodate individual food choices and checks. Focus on locally-owned venues.
- Decide on a restaurant, and date and time for the meal. Make the reservation for the date and time with the restaurant management. Be sure that there is adequate valet, garage and surface parking and wheelchair accessibility.
- Email a “hold the date”, with details of the restaurant, to all members on the Foodies group as soon as the reservation is made; follow up with an email to confirm which members and guests will attend. The emails could contain links to menus and reviews as well as the maximum number of attendees the restaurant can accommodate.
- Keep a list of attendees. If the maximum number of attendees is reached, keep a wait list in case early responders are unable to attend. Notify the restaurant of the number of attendees.
- Arrive a little early to the event to be sure the restaurant has set up the tables as discussed, including wheelchair accessibility if needed. Host the event. Bring blank nametags and pens or markers for attendees.
- Take photos, or ask another attendee to take photos, to be sent to the Webmaster to be posted on the RFSA Website and Facebook page.
- Summarize all the events for the year and provide that information to the Immediate Past President for the Annual Report.
- Serve as a member of the RFSA Board.

Speaker Series Chair

Interest Group, UT Retired Faculty-Staff Association

General Responsibilities

The Speaker Series Chair or Co-Chairs will coordinate events featuring a speaker or panel of speakers open to all RFSA members. Topics might include financial and investment issues, discussion sessions, interdisciplinary topics, health matters, or other topics deemed of interest to our members.

Specific Responsibilities

- Plan dates for the various events, typically on the second Wednesday of the month at 1:30. Reserve space for the meeting, traditionally held in the meeting room of one of the Austin Public Library branches. Howson, Yarbrough, Gillum and Old Quarry branch libraries are all good locations. Reserve the meeting room from 1:00 to 3:00 pm. Meetings are generally held from September through May. Special care should be taken to avoid potential conflicts, such as elections or holidays. Manage any unexpected problems that may arise.
- Decide on a speaker and topic for each meeting. Contact that speaker and confirm availability. Ascertain any special equipment requests and availability in the venue.
- Interact with the speaker to ensure appropriateness of topics. Ask the speaker for a short summary of the topic. Prepare a description of the speaker and topic, with date, time and location of the meeting. Forward to the Institutional Liaison, the Immediate Past President for the monthly email to members, the RFSA Webmaster to post online, and post on the RFSA Facebook page.
- Host the event. This includes setting up the meeting room and equipment, advising the speaker on connecting their computer (or other electronics) to the library's display system, introducing the speaker, taking photographs, and resetting the room afterward.
- Maintain a list of potential speakers. Ideas can come from current events, researching speakers on topics of interest for RFSA members, and member suggestions. Avoid sales talks and partisan topics.
- Respond to occasional calls or emails from members who ask questions, offer feedback or suggest speakers.
- Maintain the Speaker Series Google group and add or delete members as requested. Send out notices via this group. Use attendee sign-up sheets at events to add new members to the group.
- Write a summary of the event, including photos, for the monthly email to members, RFSA magazine and website. Post photos and information about the event on the Facebook page.
- Prepare a summary of all speaker events, including number of attendees, for the Immediate Past President to include in the Annual Report.
- Serve as a member of the RFSA Board.

Additional information which might be helpful to Speaker Series Chairs, developed by Phil Kelton and Alice Reinartz in 2023:

For the Finance meetings:

The Chair should watch for potential speakers via newspapers, TV, radio, Internet, email, member suggestions, etc. It is important to analyze potential speakers for suitability, to be sure they focus on general topics, and to avoid sales pitches when choosing speakers. Some speakers from larger companies (e.g. Schwab) must get company permission to speak and then must stick to “approved presentations” which tend to be “canned”.

Speakers from smaller companies, from UT, or not from large corporations have more freedom to define topics but that should always be done in cooperation with the Chair. It is a good idea to ask scheduled speakers for a short bio and summary of their talk before sending out meeting notices to RFSA members. Also advise speakers on how to connect their computer to the room’s display system. Most though not all speakers now use computers. Have them arrive early enough to make sure it works.

The Chair sometimes must respond to occasional calls or emails from members who ask questions or suggest speakers. Several good speakers have been suggested by members.

Finally, always take a bottle of wine for Carl Stuart! He likes pinot noir.

For the Interdisciplinary and Discussion meetings:

Similar to the duties for Finance meetings, the Chairs are responsible for finding and inviting appropriate speakers. There are multiple topics in the news or in current events. Also, members at one session may suggest future areas of interest.

Once a subject is identified, the Chairs frequently brainstorm names of speakers.

Also, one potential source of willing guests is the UT Experts list on the UT Austin website. The list is maintained by the UT office of communication.

Having contacted a potential speaker who is willing and available for the meeting date, the Chair needs to explain the level of detail that the attendees will expect. Often, it is advisable to choose individuals who have considerable teaching or speaking experience and can comfortably relate to a general audience.

Hosting the meeting involves welcoming attendees, making any relevant announcements about upcoming RFSA activities, and introducing the speaker. It is useful to have a couple of comments or questions in mind if the audience seems reluctant to engage. This is rarely a problem since most meetings have plenty of spontaneous interactions.