

## CHEVRON RETIREES ASSOCIATION

### FORMS – PURPOSE

- **CRA Form 124** – Reimbursement of Membership Solicitation. Upon completion of the annual membership drive and/or quarterly solicitation of new retirees based on the list provided by Chevron, submit this form and receipts to the Area VP for approval and transmittal to the Association's Treasurer. Expenses for printing, postage, and associated solicitation materials will be reimbursed. Receipts are required for individual expenses of \$25 or more.
- **CRA Form 125** – Chapter Dues Transmittal and Annual "1<sup>st</sup>-year Free" Member Report. This form reflects the purpose of both reporting dues and annually summarizing activity related to the "1<sup>st</sup> year free" trial initiative. A check should be made payable to the Chevron Retirees Association in the amount of \$3.00 per dues-paying member. The preferred date for transmittal of dues is **March 15**, but no later than June 15. The Association prefers to have dues paid by June 15, as we are on a fiscal year basis. However, dues can be submitted at any time.

Please note that expenditures for the chapter president to attend both the Area Executive Meeting and the Annual Meeting will not be reimbursed, if in the opinion of your Area VP, after discussions with the Treasurer, that the chapter has not made substantial dues payments by **March 16**.

- **CRA Form 126** – Chapter "1<sup>st</sup>-year Free" New Member Report. Chapter utilization of the CRA 126 is strictly optional and is a worksheet/tool for use in monitoring the list of members who have joined the chapter as part of the "1<sup>st</sup>-year free" trial initiative.
- **CRA Form 150** – Support for Local Copying and/or Mailing of *ENCORE*. Use this form, if you download and copy *Encore* (from the Association's website) for some or all of your chapter members. Copy work is reimbursed up to a maximum of \$1.65 per copy (\$0.11 for 15 pages) for the number of copies you make. In addition, postage will be paid for mailing *Encore* to your members, who **do not have Internet access** at home. For copying and mailing *Encore*, to those who do not have Internet, the current maximum reimbursement is \$2.36 per copy (\$1.65 for copying costs and \$0.71 for postage for the number you distribute. The maximum reimbursement is reviewed annually and revised when there is an increase in postage.

We strongly recommend using the Chevron Corporate account – 8400068458 – at FedEx Office locations to reduce costs. **Note:** CRA only covers the copying and mailing of *Encore*. Any added costs for the chapter's newsletter is to be covered by the chapter's treasury.

- **CRA Form 165** – Expense Report. Used for reimbursement of personal expenses associated with CRA meeting attendance (instructions for completion are on page 2 of the form). If expenses incurred are associated with either the mid-year or annual meeting, check the appropriate line, as indicated in the instructions. Reimbursement will not be made without attached receipts. However, for expenses less than \$25; e.g., tips, a receipt is not required. The exception to this is that all meals must be accompanied with receipts. Effective January 1, 2017 the mileage rate is \$0.535.

- **CRA Form 200** – Report of Chapter Officers. The report should be completed immediately **after election of officers**, but no later than December 31, if practical, and distributed as indicated on the form, when new officers are elected. If there is no change in officers, an email to the CRA Secretary, the Area VP, and the CRA President is all that is required. If the chapter includes meeting information on this form, it is recommended this be reviewed annually, as it is included in the CRA Roster that is posted on the website.
- **CRA Form 210** – Annual Meeting Proxy Form. If you are unable to attend the Annual Meeting, you will need to identify an individual within your chapter or area to be your alternate for any voting that takes place. If you cannot identify an alternate to attend for you, give your proxy to your Area VP. Complete and distribute the proxy form **ONLY** if you cannot attend the annual meeting.
- **CRA Form 220** - Public Service Award Nomination Form. Nominations for the CRA's Public Service Award either for an individual or for a chapter should be submitted to the Public Affairs Committee Chair no later than March 15. Criteria and guidelines are included on the form.
- **CRA Form 250** – Personnel Experience Record (PER) Form. This document is designed to gather information about experience, interests and skills of those in a chapter who have demonstrated leadership. The chapter president will reach out within the membership to identify potential leaders who are willing to be considered for chapter positions or committee positions at the national level and have each complete and submit a PER to the Nominating Committee Chair.
- **CRA Form 260** – Leadership Experience Record (LER) Form. Similar to the CRA 250, the form is intended to be completed by current or past chapter presidents, committee chairs, area vice presidents and/or past association presidents. Chapter presidents should complete and submit a LER form so that they can be added to the inventory of potential candidates for positions at the national level. Submit the completed form to the Nominating Committee Chair at any time.
- **CRA Form 300** – Report of Social Group Leadership – This form applies only to Social Groups and should be completed upon creation of the group or when a change in the group leadership occurs and submitted to the respective Area VP, no later than December 31.