

Guidelines for Organizing a New Local Unit

The TRTA membership and fiscal year starts on July 1st and ends on June 30th of the next year. A local unit may be organized anytime during the year.

1. If a TRTA Certificate of Affiliation Request is received by TRTA between July 1st and December 31st, that year is considered the first membership year. Additional members may be sent for processing at any time. The local unit will be eligible for representation by delegates at the TRTA Convention.
2. If a TRTA Certificate of Affiliation Request is received by TRTA between January 1st and the last day of February, the local unit will be considered as "affiliated" during that current membership year. Dues will be accepted for the charter members (names submitted with the request), which will apply to the balance of that membership year AND the next membership year. No other members will be accepted for processing until March 1st, and their state dues will be applied to the next membership year. The local unit will be eligible for representation by delegates at the TRTA Convention. The number of delegates will be determined by the number of charter members.
3. If a TRTA Certificate of Affiliation Request is received by TRTA between March 1st and June 30th, the local unit will still be considered as "affiliated" during the current membership year. Dues will be accepted for the charter members and will apply to the upcoming membership year. Additional members will be accepted for processing, and will also be applied to the upcoming membership year. The local unit will NOT be eligible for representation by delegates at the TRTA Convention; however, members are welcomed and encouraged to attend.

Steps to follow in helping organize a new local unit are listed below:

1. Determine potential area for new local unit.
2. Establish contact people in the area who will help create an interest in organizing a new unit.
3. Secure a list of all retirees in the locality in which the unit is to be organized. Possible sources of information: superintendents of schools, personnel office in city schools, friends/acquaintances and TRTA (800.880.1650)
4. Recruit members: contact prospects at campus/ISD meetings, retirement education events, media events, personal contacts and other personal communications.
5. Secure a place for the meeting and arrange date and hours.
6. Announce the meeting through local newspapers, radio, and television.
 - a. Provide an explanation of what the Texas Retired Teachers Association is.
 - b. Invite retired teachers, administrators, and all other retired school employees.
7. Pre-arrange a temporary chairman and a temporary secretary. The temporary chairman is usually the person who has helped arrange the meeting.
8. Assign mentors from strong local units to provide assistance.
9. Notify and request from the TRTA office the organizational packet.
10. Conduct the first organizational meeting and provide name tags and a sign-in sheet.
11. Conduct the second organizational meeting (for suggested agenda).
12. Send the TRTA Certificate of Affiliation request form, all the required documents, and the request for the start-up funds (\$300).
13. After the TRTA Certificate of Affiliation is awarded, the new local unit president will receive a copy of the *TRTA Leadership Manual*.
14. Conduct an affiliation recognition event.