



**THROUGH THE  
LOCAL UNIT PRESIDENT**

**RESOURCE GUIDE  
2018-2019**



All forms in this guide are available online [www.trta.org](http://www.trta.org).





## ***AS THE LEADER, YOU BECOME A GUIDE for your Unit/District***

***Know the rules of the year – Governing Documents***

***Read the Leader's (Presidents) duties on the TRTA website***

***Learn the rules of TRTA – Parliamentary Procedure***

***Identify your Other Officers***

***Have committees in place before July 1***

***Have a PLAN ready to go! Include all + spouses***

***Plan should include participation for everyone***

***Inform ALL elected officials and community leaders about your team***

***Ask Team Members what they expect to give, or receive, from working with your plan: Be prepared to LISTEN!***

***Work with the other District Leaders (Local Unit Presidents)***

***Attend & Participate in All District Team Activities, District Executive Meetings, District Fall Convention & Spring Leadership Training***

### **COMMITTEE CHAIRS**

- Should be dependable & hardworking
- Communicates with district chairs

- Provide information at local meetings
- Can have co-chairs

### **COMMITTEES**

- Legislative
- Community Volunteer
- Health Care
- Retirement Education
- Informative and Protective Services
- Member Benefits
- It is also suggested that you appoint a Parliamentarian and Historian.

(Responsibilities for these positions are explained in the President Resource Guide on the TRTA website- [trta.org](http://trta.org))

***Standing United as One Today***

***we all support TRTA!***

*(Carolyn Taylor, D-6)*

## **CHANGES**

Any changes in officers or committee chair positions that occur after May 1 should be reported to your district president. They will report the changes to the Membership Department at TRTA.

## **AWARDS**

Award templates are sent to local unit presidents by TRTA.

## **YEARBOOKS** (PLAYBOOK)

AMBA will pay for use of their advertisement in your yearbook. (Details on TRTA website, in Resource Guide)

## **NEWSLETTERS** (Xs and Os)

- Email of newsletter saves postage.
- Can be put on local web page.
- Can contain minutes, member news, committee info, legislative information.

## **PRESS RELEASE**

- Place and time of meetings
- Program information
- Committee information

## **AGENDAS**

- Sample of agendas can be found in Resource Guide (TRTA website)

## **BUDGET**

- Work with treasurer and executive committee to develop a budget. (Some locals have a budget committee.)
- Treasurer presents budget at first meeting and president puts it before the membership for approval.
- Treasurer records must be audited yearly. (Sample budget in Resource Guide-TRTA website)

## **IMPORTANT DATES**

- **Dec. 1**- District Officer Forms due to state
- **Dec. 15**- E.L. Galyean nominations to State
- **Jan. 15**- Applications due to state to run for state office (if picture is wanted in *The VOICE*).
- **Feb. 15**-Local committee reports due to districts
- **Mar. 1**- District committee reports due to state
- **Mar. 1**- Convention delegate names sent to state
- **May 1**- Local officers/committee chairs Data Collection sheet to state office



# LOCAL UNIT PRESIDENT

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## **President Duties**

### **The TRTA State President shall:**

1. Preside at TRTA Board of Directors and Executive Committee meetings and other meetings appropriate to the office;
2. Schedule meetings of the Board of Directors and the Executive Committee;
3. Consult with the Executive Director in the preparation of agendas for regular and special meetings of the Board of Directors and the Executive Committee;
4. Maintain a working relationship with other organizations having similar interests and determine any representation at events of those organizations;
5. Appoint TRTA Standing Committee Chairs and provide training;
6. Approve the program of the TRTA Convention;
7. Assume an active role in TRTA related legislative activities;
8. Monitor the status of districts and local units and support their efforts;
9. Be responsible for the awards program and determine any special recognitions; and
10. Perform other assigned duties to fulfill the objectives of TRTA.

### **The TRTA District Presidents shall:**

1. Preside at district meetings;
2. Communicate with local units through district newsletters and visit local units in the district;
3. Identify areas of the district where local units are needed and assist in their development;
4. Work with the TRTA Local Unit Support Committee to assist and strengthen local units as needed;
5. Disseminate TRTA information and materials to local units and other interested parties;
6. Participate in the preparation of a district budget;
7. Conduct an annual planning meeting, prior to September 1, with the presidents of local units;
8. Conduct the planning of the annual district fall conference and the spring leadership development conference;
9. Appoint committee chairs for the district;
10. Appoint Local Unit Support Committee Liaison for the district;
11. Report all local unit and district changes in officers or committee chairs to the TRTA Membership Department; and
12. Perform other assigned duties as outlined in the TRTA Leadership Manual and other assigned duties to fulfill the objectives of TRTA.

### **The TRTA Local Unit Presidents shall:**

1. Preside at meetings of the local unit;
2. Respond promptly and accurately to all memorandums and request for action from the TRTA office and from the district;
3. Inform the local membership on a regular basis about TRTA, district, and local unit activities;
4. Provide, or cause to be provided, an interesting program at each meeting;
5. Invite the district president and local legislators to attend at least one meeting each year;
6. Serve as coordinator of the awards program for the local unit and distribute local unit awards;

7. Report any changes of officers or committee chairs to the district president;
8. Offer an opportunity at each meeting for new members to pay TRTA and local unit dues;
9. Communicate and follow up regularly with all officers and committee chairs to ensure that responsibilities are being met. Refer to the local unit president monthly calendar in the TRTA Leadership Manual; and
10. Perform other administrative and public relations tasks as outlined in the TRTA Leadership Manual, and other assigned duties to fulfill the objectives of TRTA.

**RETIRED - ACTIVE TEACHERS ARE WE!  
JOINING FORCES IS THE KEY!**

## **PRESIDENTIAL DOs and DON'Ts**

### **DO BE: ENTHUSIASTIC, POSITIVE, and YOUR UNIT LEADER**

**DO** prepare an agenda for each meeting.

**DON'T** just come to the meeting, unprepared, full of excuses.

**DO** read and study all of the governing documents of your organization.

**DON'T** ask a past officer what has usually been done. You may be continuing to repeat a mistake.

**DO** know the extent of your authority as stated in the bylaws.

**DON'T** act as though you are all-powerful or make decisions for the organization.

**DO** learn some parliamentary procedure rules.

**DON'T** just hope that everything will turn out okay at the meeting.

**DO** start the meeting on time.

**DON'T** wait until your officers or other key members arrive.

**DO** refer to yourself in the third person, or your President, or the Chair.

**DON'T** say "I – I – I .

**DO** stay impartial; but vote when the vote is by ballot, or when the result will be affected by your vote.

**DON'T** vote with the members when the vote is by voice.

**DO** stand when addressing the assembly and when taking a vote.

**DON'T** stand during the reading of the minutes, financial report and other committee reports or during debate.

**DO** keep all debate directed to the chair or through the chair.

**DON'T** permit discussion between members.



**DO** keep debate germane, that is, pertinent to the pending question.

**DON'T** allow remarks unrelated to the pending question.

**DO** assist the members in formulating a motion.

**DON'T** state a motion when you can improve it before stating it. The members will appreciate your assistance.

**DO** state all motions clearly after seconding and before taking the vote.

**DON'T** let members be confused about the motion.

**DO** announce the vote, saying “The ‘ayes’ have it, the motion is adopted, and we will .....

**DON'T** assume that every member heard the vote and knows the effect of the vote.

**DO** expedite the meeting by using general consent when there is no opposition.

**DON'T** use valuable time by asking the members to make routine motions.

**DO** delegate responsibility to other officers and committee chairs.

**DON'T** do everything yourself because members are willing to do their part.

**DO** keep the meetings friendly and as informal as possible.

**DON'T** have meetings so stiff that members wish they had stayed at home.

**DO** enjoy the experience and learn.

**DON'T** complain about all of the work you have to do.

## TEN TOP TIPS FOR TRTA LOCAL UNIT PRESIDENTS

1. Don't be a one day a month president. Give TRTA a priority in your year as president.
2. Make sure that you provide ample opportunities to include the **spouses**. Spouses have a significant influence on the member.
3. Organize your committees **before** you take office in July. If you don't, you will be doing September's work in January.
4. Create an atmosphere of **fun** at your meetings so that people want to come and bring guests.
5. Give new members a job quickly. Don't let them sit there and wonder why they joined TRTA. Make your three newest members your membership committee and rotate the senior member off each time they find a new member.
6. People don't join only for camaraderie. Have significant **service projects** throughout the year involving different people.
7. Ask your members **what they want** from TRTA and **how they would improve your unit**.
8. Work with other Local Unit Presidents in your District. They may have solutions for problems you face or have good ideas you have not considered.
9. Talk to your elected officials and make sure they know about TRTA. Talk at schools "in service" meetings in August. Even five or ten minutes will help.
10. **Your Local Unit will only be as enthusiastic as you are.** Are you transmitting the appropriate image??

*Your role as President can be a wonderful opportunity or a complete drudgery. It's still going to last 12 months so why not make it an opportunity for yourself to grow and meet dozens of terrific people you would never have met otherwise.*

## LOCAL COMMITTEE CHAIR SELECTION

It is very important that you appoint dependable, hardworking, and enthusiastic committee chairs. They will be responsible for communicating with district chairs and providing information when needed to local unit meetings. They will need to attend training at the Spring Leadership Development Conference in your district. Local unit past presidents can help provide candidates.

The **Legislative Chair** must be able to communicate with your district chair and TRTA State Legislative Committee member from your district. This person must be able to distribute information on legislative issues to the members quickly, especially when the Legislature is in session. \*\*\*Computer skills are a must for the Legislative Chair.

The **Community Volunteer Service Chair** is in charge of collecting volunteer hours and reporting them to the District TRTA Community Volunteer Service Committee Chair. This may involve contacting local members who are not at meetings. \*\*\*EVERY chair should have email in order to receive information from state committees to share with your local members.

The **Health Care Chair** is in charge of collecting reports on healthy meetings to the District TRTA Health Care Committee Chair. This chair may collect various health related articles and information to be shared via email or a few copies at each meeting. A health related program should be scheduled. \*\*\*EVERY chair should have email in order to receive information from state committees to share with your local members.

The **Retirement Education Chair** needs to sponsor a seminar or partnering with another local unit to sponsor a seminar or some type of retirement activity for local retiring school personnel. \*\*\*EVERY chair should have email in order to receive information from state committees to share with your local members.

The **Informative and Protective Services Chair** is a resource person and should share the tip provided by the state committee via email each month. A few copies should be at each meeting for those not receiving email. \*\*\*EVERY chair should have email in order to receive information from state committees to share with your local members.

The **Member Benefits Chair** needs to highlight one of the benefits included in the TRTA Member Benefits Program via email and/or write a description of a benefit for their local unit newsletter. \*\*\*EVERY chair should have email in order to receive information from state committees to share with your local members.

The **Historian** is in charge of collecting information about the local unit and compiling the local unit scrapbook, as well as sending information for the State Scrapbook. This person should be interested in taking pictures at all meetings. \*\*\*EVERY chair should have email in order to receive information from state committees to share with your local members.

The Parliamentarian should be knowledgeable of *Robert's Rules of Order* to help the president in conducting meetings. The local unit bylaws should be reviewed each year and revised and updated, if needed. If there are changes in the local unit bylaws, a new copy should be provided to each local unit member, possibly by including the bylaws in the yearbook.

\*\*\*\*An effective local committee chair:

Passes on all information as it is received from the district chair to ensure all local members are included in TRTA Communication.

# Local Unit Budget (sample)

(Local Unit Name) (Year)

Funds Available: Start up from previous year, local unit dues (members X due amount), AMBA ad for yearbook, TRTA membership incentive money, etc.

**Total Income** \_\_\_\_\_

Officers:

President

Postage/printing \_\_\_\_\_

Awards \_\_\_\_\_

Phone \_\_\_\_\_

**Total** \_\_\_\_\_

First Vice-President

Membership recruitment/brochure/postage \_\_\_\_\_

Printing \_\_\_\_\_

**Total** \_\_\_\_\_

Second Vice-President

Printing \_\_\_\_\_

Speakers at meetings \_\_\_\_\_

Thank you notes/postage \_\_\_\_\_

Book Project \_\_\_\_\_

**Total** \_\_\_\_\_

Secretary

Paper/printing/postage \_\_\_\_\_

**Total** \_\_\_\_\_

Treasurer

Paper/printing/postage \_\_\_\_\_

Banking supplies \_\_\_\_\_

District dues \_\_\_\_\_

**Total** \_\_\_\_\_

Committee Chairmen (Amounts may vary per committee)

\_\_\_\_\_ X \$ \_\_\_\_\_

**Total** \_\_\_\_\_

Historian \_\_\_\_\_

Parliamentarian \_\_\_\_\_

Retirement Education Event \_\_\_\_\_

Scholarship Fund \_\_\_\_\_

Memorials \_\_\_\_\_

Courtesy Fund \_\_\_\_\_

Newsletter \_\_\_\_\_

Yearbooks/Directories \_\_\_\_\_

Convention expenses (# of delegates X \$ \_\_\_\_\_ )

Door prizes for two District meetings \_\_\_\_\_

Miscellaneous \_\_\_\_\_

**Total Expenses** \_\_\_\_\_

## **Local Unit President Monthly Calendar**

### **June**

1. Arrange an opportunity for outgoing and incoming officers/chairs to discuss the transition of leadership roles and distribution of appropriate materials.
2. Schedule an executive committee meeting to include officers and chairs.
3. Request officers/chairs to prepare their plan of action for the year to be presented at the executive committee meeting.
4. Secure regular meeting location for the year and prepare a proposed budget.

### **July**

1. Ensure that a local unit audit is conducted.
2. Review the TRTA Leadership Manual.
3. Prepare agenda and conduct an executive committee meeting.
4. Ensure that committee chairs have appointed committee members.
5. Ensure that local unit officers/chairs have a copy of their duties.
6. Remind local unit officers/chairs to prepare their plan of action for the year.
7. Review the proposed local unit budget.
8. Review local unit bylaws for any changes and for compliance with TRTA Bylaws.
9. Ensure that programs are planned for the year.
10. Confirm that all officers/chairs have their training materials and understand their duties.
11. Prepare a yearly calendar of important dates and deadlines.
12. Ensure the yearbook is finalized.
13. Encourage membership recruitment and retention.
14. Plan recruiting activity for new retirees.
15. If applicable, organize a publishing schedule for local unit newsletter.
16. Ensure the development and maintenance of a local unit web page.

### **August**

1. Attend the district executive committee meeting.
2. Schedule district president's visit to one of your local unit meetings.
3. Ask each officer/chairs to give a brief report at the local unit September meeting.
4. Compile list of deceased members from your local unit since the last district fall convention.
5. Print the yearbook.
6. Coordinate writing of the newsletter with officers/chairs and send a copy to the district president.
7. Include local unit web page information in newsletter.

### **September**

1. Prepare agenda and conduct local unit meeting.
2. Adopt the audit committee report.
3. Adopt the local unit budget.
4. Present programs and proposed bylaws changes for the year.
5. Distribute the yearbook and submit a copy to your district president.
6. Complete registration forms for the district fall conference and submit to the district president.
7. Attend district fall conference.
8. Continue membership drive and encourage Diamond Plus.

## **October**

1. Prepare agenda and conduct local meeting.
2. Adopt proposed local unit bylaws changes.
3. Continue membership drive.
4. Attend district fall conference (if not held in September).
5. Remind local unit treasurer to send membership reports to the TRTA office the first of every month or report on TRTAConnect between 1<sup>st</sup> and 15<sup>th</sup> of each month.
6. Submit proposals for amendments to the TRTA Bylaws by November 1 to the TRTA office.

## **November**

1. Prepare agenda and conduct local unit meeting.
2. Continue membership drive.
3. Appoint nominating committee members.
4. Begin plans for a retirement education event and secure location.
5. Promote Foundation Awareness Month.
6. Utilize at-large member list received from the TRTA office.

## **December**

1. Prepare agenda and conduct local unit meeting.
2. Last month to collect volunteer hours for current year.
3. Encourage members to attend the TRTA Convention.

## **January**

1. Prepare agenda and conduct local unit meeting.
2. Continue plans for a retirement education event.
3. Remind members/committee chairs of February 15 deadline for reports on books, health care, scholarships/grants and volunteer hours to be sent to district chairmen.
4. Begin new calendar for collection of books and hours.

## **February**

1. Prepare agenda and conduct local unit meeting.
2. Conduct retirement education seminar.
3. Announce membership drive to begin March 1.
4. Emphasize payroll deduction, bank draft, recruitment, retention and any membership campaigns.
5. Elect officers and delegates to the TRTA convention and submit to the TRTA office by March 1.
6. Remind officers and delegates to pre-register and make hotel reservations for the TRTA Convention.
7. Submit volunteer hours, health, scholarships/grants and book reports to district chairmen by February 15.
8. Remind treasurer that dues collected after March 1 will carry over to the next membership year.

## **March**

1. March 1 membership “kick off.”
2. Prepare agenda and conduct local unit meeting.
3. Recruit retirees who are not members of TRTA or your local unit.
4. Attend district executive committee meeting.

## **April**

1. Attend TRTA Convention and respective training sessions.
2. Prepare agenda and attend local meeting.
3. Report on the TRTA Convention.
4. Encourage incoming officers/chairs to attend the district spring leadership development conference; complete the registration and send to district president.
5. Prepare and send a list of local officers and committee chairs to state office prior to May 1 deadline.
6. Continue membership drive by mailing/emailing recruitment letters or calling non-member retirees.

## **May**

1. Prepare agenda and conduct local unit meeting, install officers (if applicable) and present awards.
2. Attend district spring leadership development conference.
3. Confirm that all officers/committee chairs have their training material.
4. Continue membership drive and contact new retirees.
5. Plan or attend retirement receptions for new retirees within your local unit area.
6. Assign members to call non-renewing members.
7. Appoint the local unit budget (if applicable) and audit committee members.

## **June**

1. Arrange an opportunity for outgoing and incoming officers/committee chairs to discuss the transition of leadership roles and distribution of appropriate material.
2. Schedule an executive committee meeting to include officers and chairs.
3. Request the officers/chairs to prepare their plan of action for the year to be presented at the executive committee meeting.
4. Secure regular meeting location for the year and prepare (or cause to be prepared) a proposed budget.

## LEADERSHIP IN BUILDING STRONG LOCAL UNITS

### WARNING SIGNS OF LOCAL UNIT WEAKNESS:

- Decrease in membership
- Decrease in attendance
- Difficulty in finding officers and chairmen
- Declining participation in TRTA projects (Children's Book Project, Volunteerism, Project Healthy Living, Scholarships and Grants)
- Declining program offerings
- Declining social events
- Declining over all enthusiasm

### CHECK LIST FOR ASSISTANCE AND EVALUATION

- A. Start with a "Self-Assessment"  
Consider the Chinese proverb: "***If we don't change the direction we are headed, we will end up where we are going.***"  
Do you have committee reports at meetings, do you have an agenda, do you use your Executive Board meetings for planning, do your members participate in the Project Healthy Living program, do you have social activities, do you have or share in conducting a Retirement Education Event, is your Unit active in communicating with Legislators, does your Unit have a Membership Recruitment plan, do you welcome and involve new members?
- B. Involve your district officers and use their support.
- C. Invite your district officers to attend your meeting and have them give feedback.
- D. Have your district officers attend an Executive Board Meeting and brainstorm ideas for building your unit.
- E. Schedule a "Save Our Local Unit Meeting" at a time when most Local Unit members can participate. Prepare specific questions in advance. For example, ask the members what they like about the Unit meetings and social gatherings, ask how the Unit can improve. Ask if day and time of meetings address the needs of the majority of members. Ask if programs create interest so the members want to come to meetings. Consider: are the programs intellectually stimulating, are they enjoyable and useful, did the program deliver something that the members benefited from? Look at attendance when a terrific program was given. Are the meetings too long, are the committee reports too long and rambling? Are the social gatherings enjoyable and worthwhile? Create an environment where all opinions are heard; all comments are welcome. THINK OUTSIDE THE BOX!
- F. Craft a "Self-Improvement and Growth Plan" from the suggestions generated at the meeting and put it into action. It has been said: "***People don't plan to fail...they fail to plan.***"
- G. Contact the state Local Unit Support Committee for resource materials.



## Local President's Resources

### Yearbooks

1. AMBA will pay for use of their advertisement in your yearbook. The amount they will reimburse you for is determined by membership and where the advertisement is placed in the yearbook.
2. A copy of the yearbook needs to be sent to AMBA, 6034 W. Courtyard Dr., Suite 300, Austin, TX 78730. Also include the address of your treasurer.
3. Some local units use loose leaf notebooks and only replace the pages that are new.

### Newsletters

1. Email of newsletters saves postage.
2. Some local units put their newsletter on TRTA local unit web pages.
3. Newsletter can contain:
  - Minutes of meetings
  - Member news
  - Legislative information
  - Informative and Protective Services Tips and Scams
  - Health information
  - Unit Facebook Page
  - Social Media – Facebook, Twitter

### Press Release for local newspapers

1. Place and time of meeting
2. Program information (speaker, activities and etc.)
3. Members present
4. Committee information
5. Coming events or next meeting

### Pamphlets available from State TRTA Office

1. "Thinking About Retirement"
2. "Your Money"
3. "TRTA Benefits and Member Services Guide"
4. "TRS--A Great Value for Texans" from TRS

## YEARBOOKS

Things to put in yearbook:

1. Meeting places, dates and times
2. Hostesses for meetings
3. Goals and Projects
4. Dues
5. List of Local Officers and Committee Chairs
  - Names
  - Addresses
  - Phone numbers
  - Emails
6. List of District Officers and District Committee Chairs
  - Names
  - Addresses
  - Phone numbers
  - Emails
7. List of State Officers and State Committee Chairs
  - Names
  - Addresses
  - Phone Numbers
  - Emails
8. Directory of Members
9. Lawmakers Information (Both U.S. and Texas)
  - Names
  - Addresses
  - Phone Numbers
  - Emails
10. Important TRTA Dates
  - State
  - District
11. Important Phone Numbers
  - Teacher Retirement System
  - TRS-Care
12. Past Presidents
  - District
  - Local
  - State
13. Pledges to Flags
  - Texas
  - United States
14. Advertisement for AMBA
15. Local Bylaws
16. Community Volunteer Form
17. Health Care Form
18. TRTA History

## Newsletter

### Items to Include in Newsletter

1. President's message
2. Information about the next months' activities
3. Preview of future events
4. Legislative update
5. Spotlight on members
6. Accomplishments of the local unit
7. Committee reports
8. Members' birthdays
9. Graphics/clip art
10. Pictures of members and activities
11. Recipes of special dishes served at meetings
12. Reminders of items to bring to meetings
13. Poetry
14. Appropriate quotations
15. Directions or maps to meeting places
16. Minutes of past meeting
17. Treasurer's report
18. List of local officers
19. Member news
20. State TRTA news
21. District news
22. District meeting dates
23. Local projects

For beginning and intermediate users, Microsoft Publisher has a format that you can use to design your newsletter. For advanced users, Adobe InDesign may be used.

## Local Unit Meeting Agenda (suggested)

Call to Order \_\_\_\_\_

Invocation \_\_\_\_\_

Opening Ceremonies \_\_\_\_\_

Inspirational Reading \_\_\_\_\_

Pledge of Allegiance \_\_\_\_\_

Reading/Approval of Minutes \_\_\_\_\_  
(After corrections, "The minutes are approved." No motion is required).

Treasurer's Report \_\_\_\_\_  
(The Treasurer should report orally only 4 items: budget balance, receipts, total expenditures and present balance).

Correspondence \_\_\_\_\_

Opportunity for Standing Committee Reports \_\_\_\_\_

Member Benefits Update \_\_\_\_\_

Unfinished Business \_\_\_\_\_  
(Check minutes for unfinished business. Do not ask).

New Business \_\_\_\_\_

Program \_\_\_\_\_  
(May be before the business).

Announcements \_\_\_\_\_

Adjournment \_\_\_\_\_  
(No motion is required).

*Note: The program time may need to be adjusted to fit the schedule of the presenter.*

# Parliamentary Pointers

## **ACCLAMATION**

A motion to elect “by acclamation” is “out of order” if other members wish to make additional nominations. When there are no additional nominations to be made, a motion “to close” requires a second and a 2/3 vote and would thus be a waste of the Assembly’s time. If you have no other nominations, just remain silent.

## **ADJOURNMENT**

A formal motion is NOT necessary. The presiding officer may say, “If there is no further business, the meeting is adjourned.”

## **CHAIR**

Refers to person presiding or the place from which that person is presiding.

## **MAJORITY**

More than half of the votes cast. (Abstentions do not count.)

## **MINUTES**

Say “The secretary can read the printed minutes (or the minutes can be sent electronically) of the \_\_\_\_\_(date) meeting.” After reading...“You’ve heard the reading of the minutes, are there any corrections?” Pause. “The minutes are approved as read (or as corrected).” A formal motion is not necessary.

## **UNFINISHED BUSINESS**

Do NOT use the term “Old Business” which was business on previous meeting’s agenda, which was not completed, or business, which was referred to present meeting. (President should never ask! Check minutes of previous meetings or ask secretary.)

## **PREVIOUS QUESTION**

This motion, if adopted, stops debate and causes an immediate vote on the pending motion. Previous Question requires a second, cannot be debated and a two-thirds vote for adoption.

## **RESPECTFULLY SUBMITTED**

Is no longer used. Person reporting should just sign name to report.

## **SAME SIGN/VOTING**

Do NOT use “Same Sign’. Instead say “Those in favor say ‘aye.’ Those opposed, say ‘no.’” (Not same sign)

## **SAY “I MOVE THAT”**

Never say, “I so move.” State the entire motion so Assembly will know what the question is. Have maker write the motion, particularly if it is a long or complicated one.

## **TABLE**

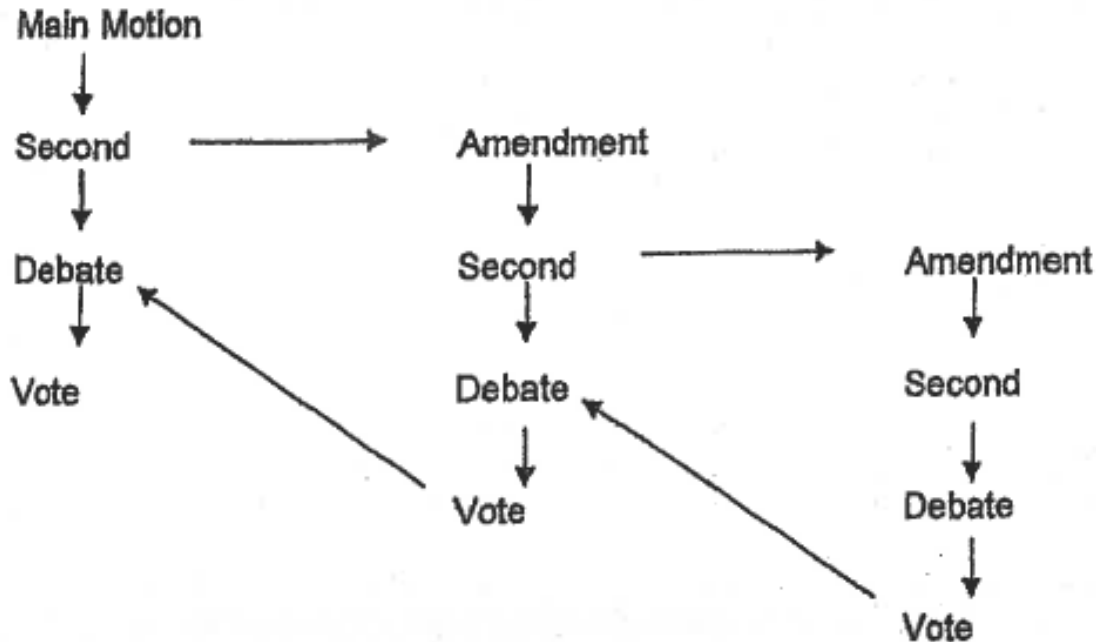
The motion to “Lay on the Table” should only be used in an emergency (Example: If an unexpected VIP enters the hall and the Assembly wishes to hear from him/her). Following emergency, the motion is “Taken from the Table.”

## **TREASURER’S REPORT**

“You have heard the Treasurer’s Report. Are there questions?” Pause “The Treasurer’s Report will be filed for audit.” (No motion... Will be approved when Audit report is approved.)

## Main Motion

Several things can happen between introducing a Main Motion and its disposal. Even so, this diagram will provide guidance for the presiding officer to handle most of the motions that come before a meeting body.



### Second not required

- Blanks, filling
- Division of assembly
- Nomination
- Object of consideration
- Orders of the day
- Parliamentary inquiry
- Point of information
- Point of order
- Reconsider, in committee

### Motions requiring 2/3 vote

- Appeal, general case (negative)
- Close nominations
- Extend time for consideration
- Limit debate
- Object to consideration
- Parliamentary standing rules
- Postpone pending to certain time & make special order
- Previous questions
- Standing rules w/o notice
- Suspend rules

### Some special votes required

- Amend bylaws
- Discharge a committee

## DO YOU KNOW THE DIFFERENCE?

### Defined Benefit vs. Defined Contribution

Do you know the difference between a defined benefit retirement plan and a defined contribution plan? Public school personnel in Texas participate in a defined benefit (DB) program. The DB plan is very important for members of the Teacher Retirement System of Texas (TRS), as our annuities are guaranteed for life by the Texas Constitution. Our annuities are determined by number of years of service, age at retirement, highest salary and a 2.3 multiplier. The state of Texas is required to contribute a minimum of 6% and a maximum of 10% of the active aggregate teacher payroll to the pension fund (the state contribution is 6.8% for 2016 and 2017). Active employees now pay 7.7% of their salaries into the fund, an amount that increased gradually from 6.4% in 2014. TRS manages the plan, invests the funds and pays out benefits to annuitants monthly.

There are groups that want to eliminate defined benefit programs and replace them with defined contribution (DC) plans. DC plans require individuals to make investment and contribution decisions. Unlike DB plans, they are portable from job to job; however, this encourages job transition that is very costly for the workforce, especially public education. The employee must ride the ups and downs of the market. This shifts the responsibility onto retirees, who can outlive the benefits they receive or be faced with unpredictable retirement income. In contrast, the DB plan assures a lifetime annuity. It is especially important for TRS to remain a defined benefit program as most Texas public school districts are not coordinated with Social Security, and TRS serves as their only form of retirement security.

#### DB vs. DC: Highlights

	<u>DB</u>	<u>DC</u>
Guaranteed for life	Yes	No
Managed by TRS investment professionals	Yes	No
Selling point for recruiting and retaining teachers	Yes	No
Generates a predictable, steady retirement income	Yes	No
Sole guaranteed income for most Texas retirees	Yes	No
Allows retirement on predetermined and predictable formula	Yes	No
Rewards years of service and job stability	Yes	No
Provides secure disability and survivor benefits based on the individual's years of service and established formula	Yes	No

# Keep Your “I’s” On Membership

## **Improve the quality of your unit**

- Greet and know all of your members.
- Know the needs of your community.
- Develop a plan to improve unit image.
- Make necessary changes – implement your plan.

## **Invite others to join TRTA**

- Appoint a Membership Committee.
- Adopt a recruiting strategy.
- Develop a prospect list.
- Conduct a recruiting campaign.

## **Inform your unit members**

- Publicize all your good works.
- Plan programs that are informative and fun.
- Provide ongoing education to all members.
- Effectively communicate to members through announcements, bulletins and phone calls.

## **Involve all the members of your unit**

- Make the unit meetings fun and valuable to attend.
- Schedule worthwhile service projects.
- Assign all members to at least one committee.
- Recognize members for their contributions.
- Urge members to participate in projects.

## **Inspire members of your unit**

- Encourage members to motivate each other and be an inspiration to others.



## Local Unit Annual Planning Meeting Agenda

Ask members to discuss:  
What we do that we like,  
What we do that we don't like,  
What we do that we would like to change,  
What we don't do that we would like to do.

1. Duties of Officers and Committee Chairs
2. Bylaws updates and changes
3. Programs for the year
4. Meeting dates and times
5. Budget
6. Committee Activities
  - Membership Ideas and Recruiting
  - Legislative Ideas and Activities
  - Community Volunteer Service Ideas and Projects
  - Health Care Ideas and Projects
  - Retirement Activities
  - Informative and Protective Services Activities
  - Public Relations
    1. Newspaper
    2. Radio or TV coverage
    3. Newsletter
    4. Telephone committee
7. Local Committee
  - Social Committee
  - Hostesses
  - Door Prizes
  - Attendance
8. Memorial Service in Fall
9. Installation of Officers in Spring
10. Important Dates
  - District Meetings
  - State Convention
  - Day at the Capitol

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2018-2019 DISTRICT PRESIDENTS**

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