



**THROUGH THE  
LOCAL UNIT SUPPORT COMMITTEE  
RESOURCE GUIDE  
2018 - 2019**



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





### **Recruiting and Retaining Members**

TRTA is all about membership. It is crucial that we continue to grow so that we will be successful in our efforts. Each unit should develop a membership recruitment plan and goal that will help them grow each year. Prospective members need to know that joining TRTA will keep them updated on issues such as annuities, legislation, insurance, and defined benefits. Recruitment ideas include: encourage “Each One, Bring One,” publicize meetings in the available media, plan and hold a new member social, offer small gifts to new members and those who recruit new members. Continue to invite prospective members to your meetings throughout the year. The future of TRTA depends on gaining new members and retaining current members.

### **Involving Members**

The success of any local TRTA unit comes from membership involvement in its meetings, programs and other planned activities. Each year, all local unit members should be encouraged to be officers, committee chairs, committee members or volunteers for other tasks. Volunteers might be encouraged to be a greeter, offer a prayer, lead the pledges, hand out materials or bring snacks. Interesting programs and trips are great ways to involve members. Involved and happy members will make your unit a successful unit.

### **Leading Effectively**

Leadership is a process that helps a group achieve its goals. There are many different styles of leadership; however, among these styles are a variety of common traits: ability to delegate, accountability, commitment to organization, effective communication, confidence, decisiveness, integrity, optimism, organized, sense of humor, and support of the organization. These skills and traits can be developed through adopting and practicing them.

### **Communicating**

Communication is the act of transmitting or exchanging information from one person to another. This interaction is the key to the success of any organization. Communication keeps our members connected and involved with TRTA goals and objectives. It also helps to unite our local units with our district and state leadership. We need to understand when to use the four different methods of communication - oral, nonverbal, written, and visual, and how to use them correctly. When we are exchanging information with our members, we must be aware of our audience and their needs and desires.

### **Planning Meetings**

Meetings that produce effective results begin with planning. Planning sets the direction for the year’s work as well as for each meeting. Involve members in all phases of the meetings. Key points in facilitating the mechanics of meetings include coordinating the meeting logistics, preparing effective meeting agendas, starting the meetings on time, keeping the meetings focused and moving, ending the meetings in a timely manner and evaluating accomplishments.

*Incorporating ideas in the LUS Resource Guide will aid your local unit in planning and achieving a successful year. All of the resource guides are available on the TRTA website at [www.trta.org/member-resources](http://www.trta.org/member-resources).*

## **District Local Unit Support (LUS) Liaison Duties**

The President of each TRTA District will appoint a person to serve in this position.

### **Suggested Activities**

#### **The TRTA District Local Unit Support Committee Liaison:**

1. Assist the district president in working with local units for increasing growth, member participation, and mentoring, as needed.
2. Accompany the District President on visits to assist local units, when possible.
3. Gather and disseminate resource materials and monthly tips to the local unit presidents relevant to maintaining strong units.
4. Assist the District President with the local unit president session during the Spring Leadership Development Conference.
5. Use the TRTA local unit support resource guide as a reference.
6. Assist local units as requested.

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# **Local Unit Support Committee**

## **Introduction**

It is through the local unit that one directly renews, recruits and retains membership. Local unit strength has a direct correlation with the viability of TRTA.

Local units in TRTA are encouraged to invite education retirees to membership and involve active members in meaningful activities planned by that unit. Doing so requires strong leadership, planning and communication.

This Local Unit Support (LUS) Resource Guide is prepared with suggestions to assist local unit leaders in fulfilling their responsibilities. As unit leaders utilize the self-checklist, ideas on membership, involvement of members, leadership, communication and planning, their local unit will continue to grow and to be strong and viable.

These materials were compiled from research, personal knowledge, and experiences of successful leaders. We wish to thank those who contributed ideas to this guide.

The Local Unit Support Committee is a TRTA state standing committee. Requests for assistance or support from a local unit may be made to the TRTA state office, LUS committee chair, to any committee member, the District President, or the District LUS Liaison. The referral process is included in this guide.

## SELF CHECKLIST OF LOCAL UNIT STRENGTHS

How would you rate your local unit on these criteria?

Consider the following situations and rate your local unit accordingly.

Please check *Yes, Sometimes, or No*

### RECRUITING AND RETAINING MEMBERS

#### Member Recruitment

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- Multiple diverse ways are used to find and communicate with prospective members
- Personal contacts are made with prospective members
- Benefits (both state and local) are emphasized with prospective members
- Membership Committee works to retain members and gain new members
- Unit uses "Each One Bring One" card when meeting former colleagues and actives nearing retirement
- Retirement Education Committee works to facilitate an event or activity, either with the unit or with the district.

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#### Member Retention

- Plan interesting programs and special events
- Membership is kept updated on legislative issues
- Communicate regularly with membership
- Plan events to include inactive and former members
- Committees inclusive of all members
- Retirement Education Committee facilitates an event or activity
- Membership recognition and importance to local unit

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### INVOLVING MEMBERS

#### Programs / High interest Activities

- Programs of interest and value are given in a timely manner
- Members are asked for their input regarding programs of interest to them
- Planned programs incorporate ways to involve members during the program
- Programs are diverse (fun, entertaining, informative)
- TRTA related programs are planned to inform members of benefits, legislative issues, publications, events/programs and available resources.

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**PLANNING MEETINGS**

**Yearly planning:**

- Arrangements for suitable, accessible meeting place(s) for the year are planned.
- Time and dates for the meetings are agreeable to the members.
- Programs set, alternate program available if you have a cancellation.
- Yearbook (or other publication) with programs, roster, officers and committee chair list is available to the entire membership

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**Individual meetings:**

- Make sure room and AV equipment are set up properly
- Flags are in place prior to the opening of the meeting
- Greeters welcome members and guests. Introduce guests and new members, provide name tags, if appropriate
- Meeting agenda is planned, available for those in attendance. Presenters are prepared to speak and reports are given in a timely manner
- Refreshments or some type of hospitality time are scheduled

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If a majority of your responses are positive, congratulations! Your local unit is doing well! Would you be willing to share your good ideas? Contact the TRTA Local Unit Support State Committee Chair.

However, if you have areas of concern and desire assistance (phone call, personal visit, etc.) please contact Jo Long, your district president or district LUS liaison.

## **Recruiting and Retaining Members**

### **IDEAS TO SHARE WHEN LOOKING FOR PROSPECTIVE MEMBERS**

Potential new members are all around us. They are church members, grocery shoppers, library patrons, senior citizen center attendees, neighbors, spouses, friends, and relatives. We need to share with them the benefits of joining TRTA.

### **RECRUITING NEW MEMBERS**

- Membership forms should be available at every meeting. Encourage members to carry a form with them at all times.
- Publicize meetings in all available media, including social media such as Facebook. Take flyers and TRTA brochures to senior centers, local businesses, and local schools.
- Plan new member social. Tell about your unit and TRTA. Make it fun and entertaining. Could be a reception, luncheon, tea, coffee, potluck meal.
- Give a small gift to each new member.
- Encourage “Each One Brings One.”
- Send letters to at-large members in your area. Follow up with a phone call and the offer of a ride to the next meeting.
- Give a gift or prize to members who bring in new members.
- Get prospective members from retirement education seminars.
- Members invite guests to meetings throughout the year.
- Become partners with your local school district. Get to know the administrators.

### **WAYS TO RETAIN MEMBERS**

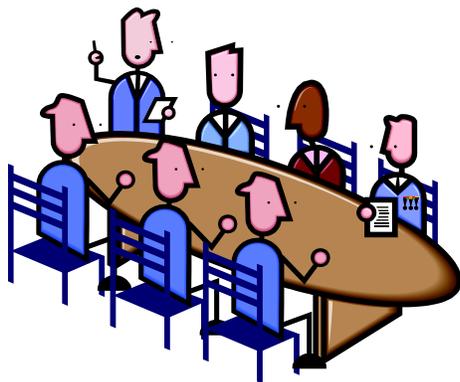
- Plan interesting programs, day trips, and special events.
- Keep membership updated as to legislative and insurance issues.
- Communicate regularly about upcoming programs, events, and issues.
- Hold a “reunion” party for former and inactive members. Let them know what they’ve been missing.
- Involve as many members as possible in monthly meetings.
- Encourage committees to meet and stay active. Give every member a job.
- Encourage new members to participate.
- Have a “telephone tree” in place to make personal calls to members.
- Recognize members for contributions to community and other organizations.
- Members should always be made to feel welcome and important to their unit.

## INVOLVING MEMBERS

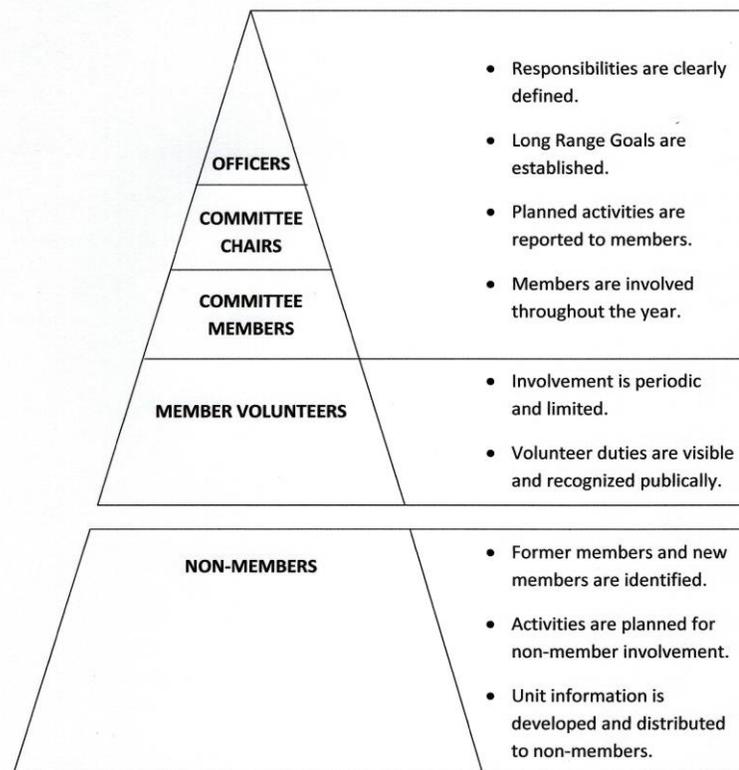
Effective and responsible planning for member involvement begins with the unit president, committee chairs and committee members.

Unit leaders need to be willing to explore new and innovative ways each year for involving members. These ideas should ensure that all members' interests are met and member talents are utilized. Members will then choose to stay active and involved in TRTA.

Most members will volunteer to help others if they are asked to help. Your unit leaders should discuss possible volunteer jobs for all members. Encourage all committee chairs to plan ways to involve volunteer helpers during the year. All opportunities should offer members some fun, be non-threatening and be supported with the help of unit leaders.



### LEVELS OF MEMBER AND NON-MEMBER INVOLVEMENT



Work closely with your local unit membership committee to develop a membership renewal plan. Look at successful strategies used by other organizations to identify and involve former members and new members. Develop some options for connecting with non-members and for inviting them to local unit meetings, functions, and other extended activities. Once identified, share your unit news with these visitors.

## SUCCESSFUL IDEAS FOR INVOLVING LOCAL MEMBERS

### INVOLVING CURRENT MEMBERS

Involved members are happy members who will share only good news to prospective members about your local unit. There are ways to involve members that are simple, fun and satisfying to the member.

Those identified leaders within your unit should be asked to serve as officers, committee chairs or as committee members. Their involvement is guaranteed because of their yearly responsibilities. Support these leaders with appropriate orientation and training and recognize their accomplishments as often as possible. They are the backbone of your organization.

Opportunities should also be provided for other members to volunteer for at least one or more meetings to assist with unit activities. Remember that volunteers also appreciate your recognition of their contributions. Consider the following ideas for volunteer contributions:

- Share a talent as a pianist, vocalist, or artist
- Bring refreshments
- Lead the pledges
- Assist with service projects
- Offer a prayer
- Be a greeter at the entry door
- Be a greeter inside the meeting room
- Lead an opening ice breaker or offer a motivational thought
- Assist in the set-up of the meeting room
- Distribute handouts
- Be a server at luncheons or parties
- Take pictures for the unit scrapbook



### INVOLVING FORMER / NON-MEMBERS

Reconnecting with former members and identifying prospective new members is a big job, but one which can be organized through a unit plan developed in cooperation with your membership committee. Opportunities to involve/invite non-members may include a:

- Past educator reunion sponsored by your unit such as a “Back To School Coffee”
- Special program of interest such as a Legislature Update or a special speaker
- Unit luncheon - also invite local school leaders and board members so they will support your efforts to reach upcoming retirees in the future.
- Informal game night
- Unit field trip such as a museum visit, a movie, or a city tour

All ideas mentioned above were shared by TRTA members who were successful at involving their members.

## **BE INNOVATIVE IN YOUR EFFORTS!**



### **PROGRAMS**

Unit programs are vital to maintaining good member attendance. They will be more likely to return for each meeting if the program is something they want to experience. All programs should be entertaining and or informative, and relevant to the local unit members.

Ideas for successful programs include music, TRTA issues, school related programs, gardening, health, book reviews, travel, crafts, sports, pets, interior design, health care options, patriotic, historical, senior legal concerns, scams, hobbies, antiques, etc. Also, consider interactive programs that will involve the audience.

To assure that member interests are considered, plan a short survey asking members to circle their top five choices from a list of possible programs. A detailed list of local unit programs are found on the Public Relations Committee webpage ([www.trta.org/public-relations-committee](http://www.trta.org/public-relations-committee)). Other ways to find programs: successful programs from other units in your district, local media such as newspapers, TV, and radio. Some counties and cities offer a speaker's bureau.

Something else to consider: Interest groups within your unit. Think about forming a travel club, card group, bunko group, movie club or book club. This is a good way to get to know and involve new members or members who don't participate in monthly meetings.

Be creative. Offer something for everyone!

### **GAVEL TRAVEL**

Try Gavel Travel in your district. Add some money to your district budget and send officers, committee chairs or any interested members to other units in your district. Be sure and let them know you're coming. What a great way to get new ideas for your unit!

### **UNIT TRIPS**

Trips can be fun, entertaining, informational, and even inspirational. Trips are based on resources available in your local unit area. Ideas for trips, like those for programs, will come from a variety of sources. Take advantage of local offerings such as guided tours of the city, museums, libraries, career related schools, colleges, specialty shopping areas, areas of historical restoration, botanical gardens, craft centers, entertainment centers, sports arenas, boat tours, television studios, etc. Guided tours offer speakers that may be an additional cost.

Consider overnight travel for a fun learning experience while enjoying lots of good fellowship. A travel professional might be engaged to make sure arrangements are secure.

## **MOST OF ALL .....ENJOY!**

## Leading Effectively

Leadership is a process that helps a group achieve its goals. There are many different styles of leadership; however, among these styles are a variety of common traits that make a leader effective. The traits listed below are traits that anyone can practice and adopt to become more effective. Leaders who are successful demonstrate the following traits:



- Ability to delegate: a leader can't—and shouldn't—try to do it all! Trust other members to each do his/her part. Identify members' strengths and capitalize on them. Encourage collaboration and make members feel empowered to do a job well.
- Accountability: Be accountable to yourself and to your members; expect your members to be accountable, also. Keep your word and act responsibly.
- Commitment to organization: Lead by example. Demonstrate by word and deed that you value TRTA (state, district and local) and that it is worthy of your time and energy. Be enthusiastic!
- Effective communication: Provide members with up-to-date information and channels for a two-way sharing of information. Actively solicit ideas and suggestions and then listen carefully to what is said! Always be friendly and approachable.
- Confidence: Setbacks will happen and problems will arise. Stay calm and remain confident that your goal will be reached. Allow failure to guide your success.
- Decisiveness: If a decision must be made be flexible in gathering information, soliciting opinions and advice, and then make an informed, timely decision. Base your response using TRTA guidelines for your position.

- Integrity: Be honest, fair and candid. Be forthright in delivering news—both good and bad—and present a fair representation of each issue.
- Optimism: Look for the positives in any situation. Promote well-being for individuals and the organization.
- Organized: Being organized ensures that you have time for your position and encourages confidence in your ability to lead. Meet deadlines.
- Sense of humor: Be able to find humor in a trying situation. Don't take yourself too seriously and be able to laugh at your own mistakes.
- Support of organization: Be familiar with the purpose, goals, and objectives of TRTA. Foster commitment and be supportive of others working toward common goals



TRTA members choose individuals whom they respect and trust as their leaders. A successful leader makes an effort to learn and practice leadership skills. These skills and traits are developed through the process of accepting responsibility and fulfilling the obligations of their position.

## Communicating

Communication is the key to the success of any organization. It is the interaction that keeps the members connected and involved. To successfully communicate, we need to be:



- clear about the purpose of the communication
- understand the different types of communication
- be flexible in our methods of delivery
- be aware of our audience

### Communication's Attributes

Good communication is:

- **Relevant**----are your words up to date, accurate, and appropriate?
- **Concise**---Try to convey your message in as few words as possible. Do not bore your audience.
- **Clear**---State your words precisely. A speaker will not be appreciated if one cannot understand the message.
- **Spoken in a friendly tone**—No one wants to listen to a grump.

### Communicating

There are four different ways to convey your message:

1. **Oral**---The spoken word is the most common method used in interpersonal relationships. To have effective oral communication one needs:
  - To be an active listener. An active listener pays close attention to what another person says, asks clarifying questions, and reorganizes what the person says for understanding. Being an active listener is one of the best ways to communicate.
  - Empathy. Empathy is understanding the point of view of the speaker, even if you disagree with what the person says.
  - Respect. Respect is making the person feel appreciated. Using a person's name, making eye contact, and being an active listener are techniques one can use to develop respect.
  - To Be Open-minded. Being open-minded is a willingness to enter into dialogue with another person in order to get positive results. Good leaders will set aside their biases and prejudices when presiding.

2. **Nonverbal**---In face –to-face exchanges, nonverbal communication cannot be overlooked. One must be aware of how body language influences communication.

- Direct eye contact says I am interested in you and it encourages the other person to respond accordingly. Eye contact gives and receives feedback. It also indicates to a partner when it is their turn to speak. When a person is finished speaking, they will look directly at the other person.
- Gestures are the fabric of our daily lives. We use them to express ourselves without thinking. Do not allow incorrect gestures to destroy your message. For example, never cross your arms when you are talking to people. This body language will be interpreted negatively. You are signaling to that person that you disagree with his or her opinion or you are not interested in what that person has to say.
- Facial expressions are able to display countless emotions without saying a word. Never allow your emotions to destroy important relationships.

3. **Written communications** are necessary when face-to-face communications are inconvenient.

Advantages of written communication include the following:

- It is the only form that allows editing and revision.
- It reduces misunderstandings.
- The information is permanent, consistent, and can be reviewed.
- It can save time. Instead of reporting orally on the minutes, treasurer’s balance sheet and committee reports at your monthly meetings send them in an email prior to the meeting, or print several copies and make them available at the meeting for your members who do not have e-mail. Time will be spent making only necessary corrections. Your members will appreciate this procedural change.

Fantastic sources of TRTA printed information are “The Voice” and TRTA Resource Guides.

4. **Visual communications** are transferred through computers, movies, TV, icons and emoticons.

The greatest example of visual communication is the World Wide Web. Excellent internet sources are found on the TRTA website ([www.trta.org](http://www.trta.org)). These include *The VOICE*, the *Inside Line*, and *Before the Bell*.

## Communicating with Members and Others

A local unit that is vibrant and growing will keep all of its members and the public informed by utilizing the pursuant strategies:

- Notices of all meetings and activities are made through newsletters published prior to meetings and announcements of meetings disseminated through websites, newspaper notices, US mail, email, social media, local radio and TV stations.
- Reports of minutes, standing committees, and the treasurer's balance sheet are given in a timely manner through e-mails, newsletters or computer projections.
- Telephone committee is in place and functioning as needed.
- Personal contacts and written messages to members are made when appropriate.
- Active communication takes place among officers and standing committee members via e-mail, letters, or face-to-face meetings.
- Regular board meetings are scheduled.
- Open communication occurs to discuss and work on future goals and events with the entire membership.
- Sponsor a charitable project or event such a toy drive, food drive or public school benefit. with another community organization.

## Aware of Your Audience: Entertaining VIPS

A dynamic local unit will communicate with the following:

1. TRTA Members, both the local unit members and the at-large members. Communications should be tailored to meet the needs of each individual member.
2. Nonmembers including recent dropouts and those who have declined to join. Keep them informed of our activities. If possible, support one of their projects. They might join in the future.
3. Active teachers will become our members in the future. We must support their causes when they benefit public education in Texas. Visit schools to promote TRTA. Encourage subscribing to "Inside Line" "Before the Bell" and "The Voice."
4. District and state TRTA officials are our team members, too. We must read and heed their correspondence. We should be willing to share our concerns with them in a cooperative manner.
5. Community leaders or the public. It is vital that each local unit participates in several community activities. The best way to silence the viewpoints of our critics is to contribute to the betterment of society.



## PLANNING MEETINGS

The mechanics of effective meetings are the basic methods, procedures, techniques and details that leaders use to implement the **yearly planning** as well as the **individual monthly meeting planning**.

The TRTA Local Unit is the agency or mechanism by which the desired effects are produced and purposes accomplished. **The Local Unit Executive Board and Committees, led by the Local Unit President, are responsible** for the meeting mechanics.

**Planning is** setting the direction for something – some system – and then **guiding** the system to follow that direction. **Involve the right people** in the planning process. **Write down the planning information** and communicate it widely. **Build in accountability** and regularly review **who** is doing **what** and by **when**.

**After election and before the new president takes office, the planning process needs to begin by:**

- Selecting and empowering committee chairs
- Preparing the participants to attend the District Leadership Development Conference
- Attending the District TRTA Spring Leadership Development Conference
- Confirming that each officer and committee chair has a copy of the TRTA Resource Guide for their position.

**After taking office, continue the planning process by:**

- Using the monthly calendar for July, August and September in the President's Training Guide
- Attending and participating in the District Summer Planning Meeting
- Preparing for and conducting a Local Unit Summer Planning Meeting to make plans for the year
- Encouraging attendance and participation in the District TRTA Fall Conference

### **KEY POINTS IN FACILITATING THE MECHANICS OF SUCCESSFUL MEETINGS**

#### **1. COORDINATING THE MEETING LOGISTICS (Yearly Planning)**

Select, arrange and provide for:

- **PARTICIPANTS**
- **DATES / TIME / LOCATION OF MEETINGS**
- **SUPPLIES AND EQUIPMENT**
- **REFRESHMENTS / HOSPITALITY**

#### **2. PREPARING EFFECTIVE MEETING AGENDAS**

- Use and adapt the suggested agenda found in the TRTA Leadership Manual.
- Plan each individual meeting and prepare the agenda in detail.

**It is a good idea to prepare a detailed scripted agenda for the President, Secretary and Parliamentarian.**

- Have participants pick up the printed agenda at the sign-in table prior to the meeting or place them on table at their seats. The agenda may be published in the newsletter prior to the meeting.
- List on the agenda the people who are doing the duties assigned.
- Contact all participants on the agenda prior to the meeting to ensure their attendance and preparation for their duties at the meeting.
- List on the agenda only the committee chairs who are prepared to report.
- Move the program ahead of the business in order to accommodate the speaker or special guest.
- Keep members informed about the TRTA activities at the District and State levels.
- Announce dates of conferences and TRTA State Convention.

**3. STARTING THE MEETINGS ON TIME AND TAKING CONTROL**

- Start the meetings on time. If the participants know that the meeting is going to start on time, they will be on time.
- Welcome members and make introductions of new members and/or guests.
- Be prepared.
- Stick to a schedule.

**4. KEEPING THE MEETINGS FOCUSED AND MOVING**

- Conduct the meeting using the prepared agenda to stay on track and focused.
- Provide for an alternate program in case of a program cancellation.
- Arrange for reports to be given in a timely manner. Minutes and treasurer's report may be published in the newsletter or printed and distributed at the meeting.
- See that planned programs are of interest and value to members of both genders.
- Manage time and redirect attention if there are distractions.

**5. ENDING THE MEETING IN A TIMELY MANNER**

- Finish the meeting in a timely manner. If the length of the meeting is to last an hour, the meeting should not last any longer.
- End the meeting on a positive note.
- Recognize those responsible for refreshments or hospitality.
- Invite members to have refreshments. (Some units serve refreshment prior to the beginning of the meeting.)
- Make important announcements not printed on the agenda.

**REACHING CLOSURE**

At the end of the year, **evaluate the planning process and the plan**, evaluate **successes** and **accomplishments**, as well as, what **could be improved**. **Regularly collect feedback** from participants and use that to determine what could be done better. **Involve members in planning for the next year.**

**Make meetings fun, enjoyable, as well as, interesting and informative.**

## SUGGESTED LOCAL UNIT ORGANIZATIONAL MODEL

STEP	TIMELINE	ACTIONS
1	Late Spring Prior to Spring Leadership Training	Have committee chairs appointed. If you are unable to fill all the slots, prioritize considering your particular unit. Combine duties and having one person representing more than one committee is an option.
2	Spring Leadership Training	Encourage all named committee chairs and officers to attend this event. Meeting with others completing the same tasks can be a great help and motivation for those serving.
3	Early Summer	Call a planning session to set meeting time, dates, and place(s) This meeting should include the officers, committee chair, local standing committee chairs and past president. Name a program committee using an officer and as many as interested in assisting in the planning.
4	Mid-summer	Program committee meets and plans programs for the year.
5	Late Summer	Confirm program committee has completed tasks. Check on meeting places for fall (if they are subject to change) and any other special arrangements.
6	Call Board meeting Approx. 3 weeks prior to first regular meeting.	Include all officers, committee chairs, standing and special committee chairs. Discuss committee work as needed. Make decisions about action issues. Plan the newsletter with information about the first meeting.
7	Committees functioning	Membership committee is working to complete roster for first meeting. All other committees are beginning/continuing duties. Newsletter information is gathered for writing and publication.
8	Approximately One and half week prior to first meeting	Gather and prepare newsletter for distribution, including meeting information, relevant committee reports, membership health and concern issues and upcoming events. Include forms for reporting volunteer hours for the summer months as well as current month.
9	Welcoming	Have greeters at the entrance area to welcome everyone attending. Meet new members and visitors.
10	Conduct meeting	Follow guidelines in this resource guide for "Planning Meetings." Have door prize drawing for those reporting "hours" and "healthy living "on the forms provided.
11	Week following meeting	Follow actions in step #6.
12	Continue rotation	Follow actions in steps # 7, # 8 and #9. Repeat rotation beginning with #6 for regular meetings.

## REFERRAL PROCESS FOR LOCAL UNITS NEEDING SUPPORT

1. Any concerned individual or entity may refer a local unit in need of support to one of the following people:
  - District President
  - TRTA Local Unit Support (LUS) Committee
  - District LUS Liaison
2. One or all of the above should notify the LUS Committee Chair within a week after learning of the concern.
3. LUS Chair gathers information from the following:
  - District President
  - District Liaisons
  - Local unit leadership needing support, if they made the referral
  - Any other individual or entity making the referral
4. LUS Chair, District President and District LUS Liaison will:
  - Contact and work with the local unit.
  - Discuss concerns and establish options with the local unit.
  - Collaborate a plan of action.
  - Implement strategies for a plan of action.
  - Make a plan for follow-up with District President, LUS Committee or District LUS Liaison.
  - Establish and maintain a log of referral and actions taken.
5. Progress check will be made with a designated time period:
  - Informal assessment
  - Suggestions for further plans