

Happy Units Healthy Units



Local Unit Support State Committee

- Janis Petronis, Chair
- Rosa Brooks
- Maydean Brown
- Karen Elliott
- Gina Pavlu

Three Steps to Healthy Units

**Characteristics
of Healthy
Units**

**TRTA
Convention
Participation**

**Identifying
Leadership**

Karen Elliott,
Lewisville,
District 11



Maydean Brown,
Copperas Cove,
District 12



Janis Petronis,
Stephenville,
District 15



Gina Pavlu,
Lavaca County,
District 3

Presenters

Creating and Sustaining Healthy & Happy Local Units

Presented by Karen Elliott



Healthy Local Units



Identifying and
training leaders



Leaders working
well together

Healthy Local Units



Common Goals



Strong Communication



Informative Meetings

Healthy Local Units



**MEMBER COMMITMENT
AND INVOLVEMENT**



**COMMUNITY
SERVICE**

Healthy Local Units

- ▶ Balance of Substance & Social
- ▶ FOOD!!!
- ▶ All members feeling needed and appreciated





Convention Participation

Presented by *Maydean Brown*



Convention Delegates - Funding

- ▶ Include money in local unit budget to help cover costs
- ▶ Plan fundraising events
- ▶ Check with your district about possible grants

Convention Delegates - Distance



- ▶ Have delegates travel together, if possible
- ▶ Assist delegates with travel arrangements, if needed

Convention Delegates - Health Conditions

Can be unpredictable and can change quickly



Be sure your unit selects an alternate delegate in case one of the delegates is unable to attend

Convention Delegates - Lack of Interest



**Boost interest by publicizing
information about the convention**



**Ask former delegates to speak to
members about exciting
opportunities and positive aspects
of past conventions**



Developing Volunteer Leaders

Presented by Gina Pavlu

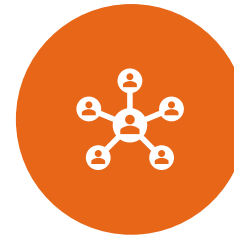
Volunteer Leadership - Purpose



**CONNECT
TO MISSION**



**CONNECT
TO ONE
ANOTHER**



**CONNECT TO
ORGANIZATION**



**CONNECTION
FEELS
GOOD...MEMBERS
STAY**



IS EVERY MEMBER OF YOUR LOCAL UNIT A LEADER?

*“Volunteers do not necessarily have the
time; they just have the heart.”*

-Elizabeth Andrew



YES!

ALL MEMBERS CAN BE
LEADERS

*“Every person can make a difference, and
every person should try.”*

-John F. Kennedy

Volunteer Leadership - When




- ▶ NOW!!!
- ▶ Get information out early
- ▶ May 1 is TRTA deadline
- ▶ Successful units establish leadership for upcoming year

"Volunteering is the ultimate exercise in democracy. You vote in elections once a year, but when you volunteer, you vote every day about the kind of community you want to live in."

-unknown



Volunteer Leadership - How

- ▶ Establish a strong/willing nominating committee
 - ▶ Promoting the election
 - ▶ Determine vacant positions
 - ▶ Inform entire membership of vacant positions
 - ▶ Encourage members to talk with current officers
 - ▶ Ask membership to volunteer or recommend potential candidates
 - ▶ Conduct one on one conversations
- 



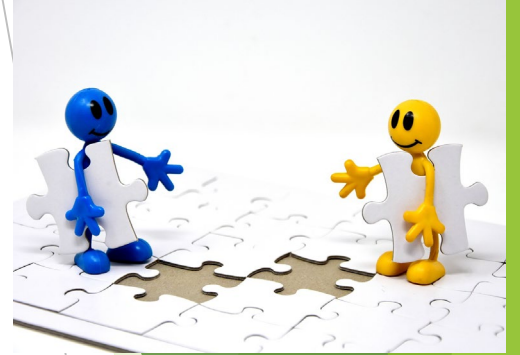
Volunteer Leadership - How

- ▶ Create bite-size roles
- ▶ Inventory your membership
- ▶ Limit terms...TRTA recommends 2/2yr terms for President
- ▶ Empower Possibility
- ▶ Communicate Opportunities
- ▶ Allow for mistakes

“Life’s most persistent and urgent question is, what are you doing for others?”

-Martin Luther King Jr.

Volunteer Leadership-How



Follow Hierarchy

Shared Positions

Determine Must Fill Positions

Whatever It Takes

Volunteer Leadership - Ensure Success!

- ▶ Provide new officers with necessary information tools, and resources
- ▶ Provide names of others who have previously held the position
- ▶ Help new officers' transition - mentor
- ▶ Schedule a post-election meeting for newly elected officers to meet with past presidents and nominating committee to get to know one another as well as inform of responsibilities

HAVE FUN!! HAPPY UNITS ARE HEALTHY UNITS

“No one can do everything, but everyone can do something.”

-unknown



**Now We
Want Your
Ideas!!**

Please share your ideas, we will compile them by topic, and make them available later.

- 💡 What is a Healthy Unit?
- 💡 Getting to Convention/Rally Day
- 💡 Ensuring Unit Leadership
- 💡 Anything else you'd like to suggest...



Send to: jfpetronis@gmail.com

Happy Units Healthy Units

Local Unit Support State Committee



Local Unit Support State Committee

Happy Units

Healthy Units

Prepared for 2020 TRTA Convention

Chair, Janis Petronis, Stephenville, Dist. 15
Maydean Brown, Copperas Cove, District 12
Karen Elliott, Lewisville, District 11
Gina Pavlu, Lavaca County, District 3



Happy Units are Healthy Units

The TRTA State Local Unit Support Committee decided on the topic, format and member presentations for our TRTA Convention session in mid-January, before the coronavirus changed all of our plans. The LUS Committee hopes all TRTA members stay healthy during this difficult time, and look forward to when we may all get back to building strong, healthy TRTA local units for 2020-2021.

Ideas for Becoming or Maintaining a Healthy Unit

by Karen Elliott

Good communication – emailing, calling, etc. - remembering that your membership spans generations so adjust your methods of communicating accordingly.

Variety of programs – speakers who would be beneficial and interesting for retirees, such as authors, attorneys to speak on wills and financial planning in retirement, fitness and food, historians, or any persons with a topic that would appeal to the retiree age group. Tim Lee is always a hit! Having students from local schools come to entertain at your meeting is another idea. Each area of Texas is different and will obviously have different possibilities!

Commitment and common goals – No two units are alike so there needs to be a balance of “substance” and “social.” Be aware of all of your members and their likes and dislikes so you get a balance of activities and programs.

Work with projects in your community - Every member is different but some possibilities are volunteering with community projects or other non-profit groups, reading with kids at schools, volunteering in hospitals, ringing the bell for the Salvation Army at Christmas time, or visiting shut-ins just to name a few. These are also great ways to get your “community service hours.” Of course, the size and make-up of your community will definitely affect your choices.

Executive board that works together as a team and communicates on a regular basis and makes sure everyone knows her/his responsibility and where they can find resources for their position. Identify and train leaders who will step up and become officers. Some units have officers that just move up every 2 years so when they become president, they know the jobs of others under them because they’ve been there. By doing this, you have an automatic progression of training as well.

Stay active and aware on legislative issues - Meet the people running for office through their receptions or at their offices. Ask questions to learn how they stand on various issues. Express your concerns and hopes for retirees. Make sure to read “The Voice” and Tim Lee’s “Inside Line” on a regular basis so you’ll know what’s going on throughout the state. All 98,000 + of us make a very strong and vocal group!

Award scholarships to graduating seniors who are planning to major in education. One way to fund this is through memorials. If a member loses a friend or family member, they give a memorial to their unit’s scholarship fund. Another way is to have a “silent auction” or even a “live auction” with members donating items for the auction. The items could be bought or hand-made by a member(s). These events could be held around Thanksgiving or Christmas....or whenever it fits in your schedule.

Help the 1st Vice President with renewals - have a special time when as many as possible get together, take the membership list and divide it up. Then they make personal phone calls and either send letters or go visit that member. If a member is emailed and the letter “bounces” back, they telephone them or visit them.

Consider the “time” of your meeting - Some units always meet in the morning, some at a lunch setting, and some actually meet at night. Think about what’s best for your unit because you want as many members there as possible!

Don’t forget food! - This always brings members together. Some units have luncheon meetings on a regular basis; some have a mix of “just refreshments” and a couple of meals at the first and last meeting; and others have their meeting at a restaurant.

According to Ricky Chandler, District 18 President, the true key factors are to “make the unit meeting informative, involve all the members, and make the members feel needed in the group.”

Transportation Options for TRTA Local Units

by Maydean Brown

TRTA Districts across Texas may take advantage of this travel option, but here are suggestions and information from District 11 and 12.

District 11 – This information was provided by Fran Patterson, District 11 President, franap@yahoo.com 940-328-5299. The District charts a bus to “Day at the Capitol” and to conventions. This is done several months prior to the event. For the Corpus Christi trip, the bus had planned to leave early Monday morning, April 6, returning home Wednesday evening, April 8. Riders had planned to meet at a designated hotel in south Fort Worth to board the bus. The District 11 would have paid for the bus driver’s hotel room.

District 11 Treasurer, Owen Matthews (817-284-5970), has organized the trips and provided the following information:

District 11 uses Echo Transportation, PO Box 207761, Dallas 75320-7761, phone 817-572-4114. This company services the DFW area and has always provided good drivers, which makes rides feel safe and confident. Echo allows riders to carry water and snacks on the bus.

TRTA riders pay \$50 each for the trip to Convention and the district pays the excess. Riders will also pay \$50 for TRTA Rally Day at the Capitol, but their checks will be returned or destroyed if they show up for the trip. Riders chip-in funds to tip the driver on both the Convention and Rally Day trips.

District 12 – The following information was provided by Karen Kay, a member of Waco-McLennan County RTA, 254-662-0631. Karen has previously organized bus trips for Day at the Capitol, taking reservations and keeping track of all riders. The unit charts the bus and invites all local units in District 12 to ride the bus for \$10 per person, with District 12 helping with the remaining cost of the bus. The bus driver is reimbursed for gasoline.

The bus boards riders in Waco, Temple and Belton. Unit members from Killeen and Copperas Cove normally board in Belton. The bus travels to Austin for Rally Day at the Capitol and returns that same evening, making all the same stops along the way.

Developing Volunteer Leaders

by Gina Pavlu

Volunteer Leadership – Purpose

- ❖ Connects members to the mission of the local unit
- ❖ Connects members to one another
- ❖ Connects members to the community
- ❖ Connects members to the organization/TRTA

Connection Feels Good and Members Stay!

Volunteer Leadership – When

- ❖ Now!!
- ❖ Recruiting Members should be ongoing/continuous
- ❖ Provide information about leadership roles to all members
- ❖ May 1 is the TRTA deadline for reporting leadership
- ❖ Successful units establish leadership early for the upcoming year

Volunteer Leadership – How

- ❖ Nominating Committee
 - ❖ Establish a strong/willing nominating committee
 - ❖ Task the committee with promoting the election
 - ❖ Determine vacant positions
 - ❖ Inform entire membership of vacant positions
 - ❖ Encourage members to talk with current officers
 - ❖ Ask membership to volunteer or recommend potential candidates
 - ❖ Nominating committee should conduct one on one conversations
- ❖ Continue Seeking Leaders
 - ❖ Consider breaking down roles into something a member is willing to do
 - ❖ Inventory your members – you don't know if you don't ask
 - ❖ Limit terms of leadership – TRTA recommends 2/2-year terms for president
 - ❖ Empower members – be willing to accept new approaches and new ideas
 - ❖ Communicate to all – cast a wide net of needs

- ❖ Ideas from Local Units
 - ❖ Follow hierarchy for leadership roles – 1st VP moves into presidency
 - ❖ Create co-presidents, co-secretaries, etc.
 - ❖ Determine which positions MUST be filled
 - ❖ Have a Whatever It Takes attitude

Volunteer Leadership – Ensure Success!

- ❖ Provide new officers with necessary tools and resources
- ❖ Provide names of others who have previously held the position
- ❖ Help new officers' transition – mentor
- ❖ Schedule a post-election meeting for newly elected officers to meet with past presidents and nominating committee to get to know one another as well as inform them of responsibilities

**Now, please share your ideas
for keeping TRTA units
healthy!**

- A. What does a “healthy and happy” unit look like?
- B. How do you raise money for and arrange travel to Convention or the Legislative Rally Day?
- C. How does your unit ensure continual strong unit leadership?
- D. What other ideas do you have to build healthy and happy units?

Please email your ideas to jfpetronis@gmail.com. Those ideas will be compiled and made available on the Local Unit Support section of the TRTA web site.