



TEXAS RETIRED TEACHERS ASSOCIATION

TRTA: The Voice For All Public Education Retirees

LOCAL UNIT PRESIDENT

RESOURCE GUIDE 2020-2022

Forms in this guide are available online at www.trta.org/member-resources

Local Unit Presidents Are a Major Connection to TRTA's Success!



As the TRTA Local Unit President:

1. Preside at meetings of the local unit;
2. Communicate and follow up regularly and respond to all emails and phone calls from all officers, committee chairs, and members of TRTA to ensure that responsibilities are being met. Refer to the local unit president monthly calendar in the TRTA Leadership Manual;
3. Respond promptly and accurately to all memoranda and request for action from the TRTA office and from the district;
4. Inform the local membership on a regular basis about TRTA, district, and local unit activities;
5. Provide, or cause to be provided, an interesting program at each meeting;
6. Invite the district president and local legislators to attend at least one meeting each year;
7. Serve as coordinator of the awards program for the local unit and distribute local unit awards;
8. Report any changes of officers or committee chairs to the district president;
9. Offer an opportunity at each meeting for new members to pay TRTA and local unit dues;
10. Complete the general liability insurance certificate; and
11. Perform other administrative and public relations tasks as outlined in the TRTA Leadership Manual, and other assigned duties to fulfill the objectives of TRTA.

**Effective and happy Local Unit Presidents know that it is not a one man/woman job!
You have a tremendous support system!**

COMMITTEE CHAIRS HELP KEEP THE Membership Informed

- They communicate with district chairs
- Provide information at local meetings
- Can have co-chairs or committees

EXECUTIVE COMMITTEE Minimum of 5 Officers:

President, 1st VP, 2nd VP, Secretary and Treasurer help you plan and conduct your meetings

COMMITTEES - MINIMUM OF 4 Committees are *Required but encourage you to have all of them!

- Legislative*
- Membership & Treasurer should work together *
- Community Volunteer Service*
- PR/Children's Book Project*
- Healthy Living
- 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 www.trta.org)
- BECOME FAMILIAR WITH THE LEADERSHIP MANUAL

A MINIMUM OF SIX (6) MEETINGS

- **What defines a meeting????**
- **What is important that needs to be part of the meeting?**
- **What kind of meetings attracts more members?**

Local Unit President's Calendar is the in the Local Unit President's Guide is on pp. 2-3 and it is your best friend!

Important to know:

AWARDS – those given at the local level:

Award templates are sent to local unit presidents by TRTA.

YEARBOOKS:

AMBA will pay for use of their advertisement in your yearbook.

Details on TRTA website, in Resource Guide

NEWSLETTERS they are not your duty! If you want one get help!

- Email of newsletter saves postage and helps keep the membership informed.
- Can be put on local web page.
- Can contain minutes, member news, committee info, legislative information.

PRESS RELEASE -Helps let the community know about you!

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



AGENDAS – They guide you and can be simple!

- Sample of agendas can be found in LU Resource Guide (TRTA website) p. 13 & 17

BUDGET – Work with your Executive Board to develop it! (Sample on p. 7)

- Work with treasurer and executive committee to develop a budget. (Some locals may have a budget committee).
- Treasurer presents budget at first meeting and President puts it before the membership for approval.

CHANGES in Officers and Chairs:

Any changes in officers or committee chair positions that occur after May 1 should be reported to the District President who forwards it to the State Membership Department at TRTA.

IMPORTANT DATES

- **November 1** - Districts submit one E.L. Galyean nomination to the State
- **December 1** - District Officer forms due to state
- **January 15** - Applications due to state to run for state office (if picture is wanted in *The VOICE*) on even numbered years.
- **February 15** - Local Standing committee reports due to district counterparts.
- **March 1** - District Standing committee reports due to state.
- **March 1** - Convention delegate names need to be sent to state on even numbered years.
- **May 1** - Local officers/committee chairs data collection sheet needs to be to state office.

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State and District President

The TRTA State President:

1. Preside at TRTA Board of Directors and Executive Committee meetings, and other meetings appropriate to the office;
2. Communicate and follow up regularly and respond to all emails and phone calls from all officers, committee chairs, and members of TRTA to ensure that responsibilities are being met;
3. Schedule meetings of the Board of Directors and the Executive Committee;
4. Consult with the Executive Director in the preparation of agendas for regular and special meetings of the Board of Directors and the Executive Committee;
5. Maintain a working relationship with other organizations having similar interests and determine any representation at events of those organizations;
6. Appoint TRTA Standing Committee Chairs and provide training;
7. Approve the program of the TRTA Convention;
8. Assume an active role in TRTA related legislative activities;
9. Monitor the status of districts and local units, and support their efforts;
10. Be responsible for the awards program and determine any special recognitions; and
11. Perform other assigned duties to fulfill the objectives of TRTA.

The TRTA District Presidents:

1. Preside at district meetings;
2. Communicate and follow up regularly and respond to all emails and phone calls from all officers, committee chairs, and members of TRTA to ensure that responsibilities are being met;
3. Communicate with local units through district newsletters and visit local units in the district;
4. Identify areas of the district where local units are needed and assist in their development;
5. Work with the TRTA Local Unit Support Committee to assist and strengthen local units as needed;
6. Disseminate TRTA information and materials to local units and other interested parties;
7. Participate in the preparation of a district budget;
8. Conduct an annual planning meeting, prior to September 1, with the presidents of local units;
9. Conduct the planning of the annual District Fall Conference and the Spring Leadership Development Conference;
10. Appoint committee chairs for the district;
11. Appoint Local Unit Support Committee Liaison for the district;
12. Report all local unit and district changes in officers or committee chairs to the TRTA Membership Department;
13. Complete the general liability insurance certificate; and
14. Perform other assigned duties as outlined in the TRTA Leadership Manual and other assigned duties to fulfill the objectives of TRTA.

Local Unit President's 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 and the TRTA Bylaws.
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. Request that local unit officers/chairs prepare their plan of action for the year.

7. **Review the proposed local unit budget.**

8. **Review the bonding form.**

9. Ensure programs are planned for the year.
10. Confirm that all officers/chairs have their training materials.
11. Utilize this yearly calendar!
12. Ensure the yearbook is finalized.
13. Encourage membership recruitment and retention.
14. Plan recruiting activity for new retirees.
15. Organize a publishing schedule for local unit newsletter, if applicable.
16. Ensure that a local unit web page is developed and maintained.

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/chair 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 Conference.
5. Print the yearbook.
6. Coordinate writing of a newsletter with officers/chairs and send a copy to the district president.

7. Include local unit web page information in newsletter.

8. Complete registration form for the District Fall Conference and submit to the district president, if applicable.

9. **Ensure audit is complete and prepare report for the September meeting.**

September

1. Prepare agenda and conduct the local unit meetings.
2. Adopt the audit committee report.
3. **Confirm submission or update of bonding form.**
4. Adopt the local unit budget.
5. Present programs and proposed local unit bylaws changes for the year.
6. Distribute the yearbook and submit to your district president.
7. Attend District Fall Conference.
8. Continue membership drive and encourage the Diamond Plus Program.

October

1. Continue membership drive.
2. Attend District Fall Conference (if not held in September).
3. Remind local unit treasurer to send membership reports to the TRTA office the first of every month or report on TRTAConnect between 1st and 15th of each month.

November

1. Continue membership drive.
2. Begin plans for a retirement education event and secure location.
3. Promote Foundation Awareness month.
4. Utilize at-large member list for local unit membership recruitment
5. Local Unit Nominations for E.L. Galyean award must be submitted and approved by District and sent to State office by Nov.1

December

1. Remind committee chairs to finalize reports by December 31.
2. Encourage members to attend the TRTA Convention.

January

1. Continue plans for a retirement event.
2. Remind committee chairs to submit reports of CVS hours, book totals online by February 15.
3. Remind healthy living, retirement education events, scholarships and grants to district chair counterparts by February 15.
4. **Begin the** collection of books, hours, healthy living, retirement education events, scholarships and grants.
5. Receive TRTA Awards Program packet via email.

6. Start preparations to attend TRTA Day at the Capitol event in odd years or Convention on even numbered years.
7. Discuss appointment of committee chairs for next membership year.

February

1. Conduct retirement event or seminar.
2. Announce membership drive to begin March 1.
3. Emphasize the Diamond Plus Program, and any membership campaign.
4. Elect officers and delegates to the TRTA Convention on even numbered years and submit to the TRTA office by March 1.
5. Remind treasurers that dues sent after March 1 will carry over to the next membership year.
6. Discuss appointment of committee chairs for next membership year.

March

1. March 1 membership “kicks off.”
2. Encourage the membership to recruit retirees who are not members of TRTA.
3. Attend district executive committee meeting.

April

1. Attend the TRTA Convention or Day at the Capitol Event.

2. Report on the TRTA Convention or Day at the Capitol event.
3. Encourage incoming officers/chairs to attend the Spring Leadership Development Conference; complete registration and send to district president.
4. Continue membership drive.
5. Submit 2020-2021 or 2020-2022 TRTA Data Collection Form by May 1 to the TRTA office.
6. Attend Spring Leadership Development Conference, if applicable.

May

1. Attend Spring Leadership Development Conference, if applicable.
2. Confirm that all local unit officers/chairs have their training materials.
3. Install officers and present awards.
4. Continue membership drive and secure list of those retiring from each ISD within your local unit area.
5. Attend retirement for this year’s retirees or plan reception, breakfast, luncheon, or dinner.
6. Appoint the local unit budget and audit committee members.



Presidential Dos

Do Be: Enthusiastic, Positive and Your Unit Leader

DO prepare an agenda for each meeting.

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

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

DO learn some parliamentary procedure rules.

DO start the meeting on time.

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

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

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

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

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

DO assist the members in formulating a motion.

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

DO announce the vote, saying "The 'ayes' have it, the motion is adopted, and we will"

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

DO delegate responsibility to other officers and committee chairs.

DO keep the meetings friendly and as informal as possible.

DO enjoy the experience and learn.

Ten Top Tips for Local Unit Presidents

1. Give TRTA a priority in your year as president. Don't be a one day a month president.
2. Develop a Team; it's not a one man/lady job!
3. Make sure that you provide ample opportunities to include the **spouses/partners**. Spouses/partners have a significant influence on the member.
4. Organize your committees **before** you take office in July. For small local units, committees may consist of 1 or more members.
5. Create an atmosphere of **fun** at your meetings so that people want to come and bring guests.
6. Give new members a job quickly that doesn't scare them away. Don't let them sit there and wonder why they joined TRTA. If possible, make your three newest members your membership committee and rotate the senior member off each time they find a new member.
7. People don't join only for camaraderie. Have significant **service projects** throughout the year involving different people.
8. Ask your members **what they want** from TRTA and **how they would improve your unit**.
9. Meet and 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.
10. 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.

Your Local Unit will only be as enthusiastic as you are.

Your role as President is a wonderful opportunity for you to meet dozens of terrific people you would never have met otherwise.



Local Unit Committee Chair Selection Suggestions

***Use the 1-Pagers of each committee when approaching members. They want to know what is being asked of them and it is different than what is asked for at the district or state level.**

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 provided by the District Chair 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 online. If they need help, their District chair can help them. This may involve contacting local members who are not at meetings. *** EVERY chair should have email in order to receive vital information from the district and state committees to share with your local membership.

The **Healthy Living Chair** is in charge of collecting reports on healthy meetings to the District TRTA Healthy Living Committee Chair. This chair will also receive monthly activities to share with the membership from the District chair, or may collect various health related articles and information. If you are not receiving them contact your District Chair as soon as possible. Work with the President to plan at least one health-related program. ***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 some type of retirement activity or seminar for local retiring school personnel. There are many types of retirement education activities outlined in the resource guide. ***EVERY chair should have email in order to receive vital information from the district and state committees to share with your local membership.

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 vital information from the district and state committee to share with your local membership.

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 pages that are sent to the District Chair who will forward to the State Chair. 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 Chairs (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	_____

Locate your Local Unit Support Liaison or District Local Unit Support Liaison for Help in Maintaining or Building Strong Local Units

Warning Signs of Local Unit Weakness:

Decrease in membership

- Decrease in attendance
- Difficulty in finding officers and chairs
- Declining participation in TRTA projects (Children's Book Project, Volunteerism, Scholarships and Grants)
- Declining program offerings
- Declining social events
- Declining overall enthusiasm

Suggested Check List for Assistance and Evaluation

- A. Start with a "Self-Assessment" or Local Unit Self-Check which is found in the Local Unit Support resource guide.
 - 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 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."***

Contact the state Local Unit Support Committee at www.trta.org for resource materials.

Local President's Suggestions

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 and keeps members informed when unable to attend a meeting.
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, etc.)
3. Members present
4. Committee information
5. Coming events or next meeting

Pamphlets available from the TRTA Office

1. "TRTA Benefits and Member Services Guide"
2. "TRS: A Great Value for Texans" (from TRS)

Suggestions for Yearbooks

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 Services Form or Link
17. TRTA History

Suggestions for a 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, a Word program or Microsoft Publisher has a format that can be used to design your newsletter. For advanced users, Adobe InDesign may be used.

The online Public Relations Page at www.trta.org/public-relations-committee has a link to a Newsletter Sample.

Please note that a newsletter is not a required duty of the local unit president. The president may delegate the newsletter to another officer or committee chair if one is desired.

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 or CALL FOR THE QUESTION

This motion, if second and adopted by 2/3 vote, stops debate and causes an immediate vote on the pending motion. **Previous Question or Call for the 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

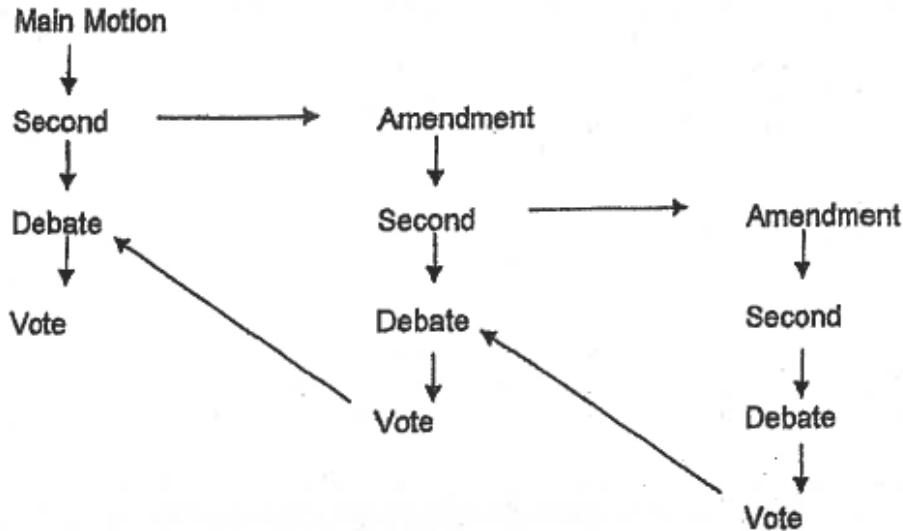
The motion to “Lay on the Table” should only be used in an emergency (Example: If an unexpected VIP enters the hall and the Assembly wishes to hear from him/her). Following emergency, the motion is “Taken from the Table.”

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

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 7.5% for 2020 and 2021 and will increase to 7.75% in 2022, 8.0% in 2023, and finally 8.25% in 2024). Active employees now pay 7.7% of their salaries into the fund, an amount that increased gradually from 6.4% in 2014. This amount will increase again in 2022 to 8.0% and in 2024 to 8.25%. School districts now contribute 1.5%, but this will increase to 1.60% in 2021, 1.70% in 2022, 1.80% in 2023, 1.90% in 2024, and finally 2.00% in 2025. The increases are the result of the passage of Senate Bill 12 in 2019 during the 86th Legislative Session. 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 (Sample)

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

Texas Retired Teachers Association

2020-2021 District Presidents

DISTRICT 1

Dr. Arturo Limon
1818 Musser St
Laredo, TX 78043-2352
(956) 286-7217
dr.art1@sbcglobal.net

DISTRICT 4

Mary Ann Dolezal
11 Stalybridge Ct
Sugar Land, TX 77479-2917
(281) 980-2208
madolezal@windstream.net

DISTRICT 7

Dr. Marilyn Williams
19347 State Highway 110 S
Whitehouse, TX 75791-6100
(903) 258-0943
drmjwilliams1956@gmail.com

DISTRICT 10

Sandra Barber
1503 Evanvale Dr
Allen, TX 75013-5804
(972) 359-1172
sandrabarber513@gmail.com

DISTRICT 13

Gene (Tommy) Stokes
508 Dennis Dr
Round Rock, TX 78664-3054
(512) 255-4869
gene6941@gmail.com

DISTRICT 16

Doneice Ray
6706 Sandie Dr
Amarillo, TX 79109-5047
(806) 676-0222
doneice@swbell.net

DISTRICT 19

Nancy Evans
3200 Tyrone Rd
El Paso, TX 79925-4373
(915) 592-7135
nevans1@elp.rr.com

DISTRICT 2

Beverly Tackett
218 Wagon Wheel Dr
Corpus Christi, TX 78410-1714
(361) 241-4622
btackett@stx.rr.com

DISTRICT 5

Artemus Hancock
3728 Boulder Ave
Port Arthur, TX 77640-2674
(409) 433-5314 • (409) 718-0725 cell
artemushancock@sbcglobal.net

DISTRICT 8

Julie Spears
PO Box 787
New Boston, TX 75570-0787
(817) 980-6318
jfoxspears@gmail.com

DISTRICT 11

Pat Lioce
7500 Blue Sage Cir
Fort Worth, TX 76123-1084
(817) 294-8131
plioce129@sbcglobal.net

DISTRICT 14

Sharon Daugherty
3309 E Lake Rd
Abilene, TX 79601-4828
(325) 673-9446
sharond31@suddenlink.net

DISTRICT 17

Terri Navrkal
10301 Wayne Ave
Lubbock, TX 79424-5707
(806) 786-8800
navrkal@swbell.net

DISTRICT 20

Irene Rodriguez-Dubberly
400 County Road 731
Yancey, TX 78886-4004
(210) 355-4472
roddubbs@aol.com

DISTRICT 3

Laura Whitson
607 W Thomas St
Cuero, TX 77954-3467
(361) 275-6545
misdpanthers@yahoo.com

DISTRICT 6

Elizabeth Ricciardi
55 Somerset Pond Pl
Spring, TX 77381-5173
(713) 825-9871
bethricci@aol.com

DISTRICT 9

Karla Wallace
6715 Kovarik Rd
Wichita Falls, TX 76310-5147
(940) 613-2840
karlagw@rocketmail.com

DISTRICT 12

Laura Rothrock
807 E Palestine St
Mexia, TX 76667-2947
(254) 562-6907
lerothrock@sbcglobal.net

DISTRICT 15

Dr. Janis Petronis
142 Ben Hogan Dr
Stephenville, TX 76401-5915
(254) 965-6347
jfpetronis@gmail.com

DISTRICT 18

Shirley Johnson
575 SE 2001
Andrews, TX 79714-5750
(432) 556-5017
st_1951@yahoo.com