

# ORGANIZING A NEW LOCAL UNIT

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## **Online Documents**

- [Certificate of Affiliation Request and Tax Reporting Option Forms \(Interactive\)](#)
- [Local Unit Bylaws \(Suggested\)](#)

## Guidelines for Organizing a New Local Unit

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

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

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

1. Determine potential area for new local unit.
2. Establish contact people in the area who will help create an interest in organizing a new unit.
3. Secure a list of all retirees in the locality in which the unit is to be organized. Possible sources of information: superintendents of schools, personnel office in city schools, friends/acquaintances and TRTA (1.800.880.1650).
4. Recruit members: contact prospects at campus/ISD meetings, retirement education events, media events, personal contacts and other personal communications.
5. Secure a place for the meeting and arrange date and hours.
6. Announce the meeting through local newspapers, radio, and television.
  - a. Provide an explanation of what the Texas Retired Teachers Association is.
  - b. Invite retired teachers, administrators, and all other retired school employees.
7. Pre-arrange a temporary chair and a temporary secretary. The temporary chair is usually the person who has helped arrange the meeting.
8. Assign mentors from strong local units to provide assistance.
9. Notify and request from the TRTA office the organizational packet.
10. Conduct the first organizational meeting (see page 2) and provide name tags and a sign-in sheet.
11. Conduct the second organizational meeting (see page 2 for suggested agenda).
12. Select your tax reporting option and complete the form [here](#).
13. Send the TRTA Certificate of Affiliation Request form [here](#), all the required documents, and the request for the start-up funds (1–10 members \$300, 11–15 members \$400 and over 15 members \$500).
14. After the TRTA Certificate of Affiliation is awarded, the new local unit president will receive a copy of the *TRTA Leadership Manual*.
15. Conduct an affiliation recognition event.

# Agenda for the First Organizational Meeting (Suggested)

Organizational meeting of the \_\_\_\_\_

District president:

- Welcome and thank you for your interest in forming a local unit for public education retirees.
- Introductions (names, place of retirement, year)
- Introductions of visitors (spouse or TRTA members from other local units)

District president, past district president or a district officer (suggested comments):

- TRTA keeps you informed by providing current information about legislative activities.
- TRTA is focused on protecting and improving the benefits of public education retirees.
- TRTA is a service and action organization and many projects are implemented through the local units, including volunteer opportunities.
- Fellowship, entertainment and meaningful programs are enjoyed.

District president introduces the temporary chair and temporary secretary.

Temporary chair:

- Select a nominating committee (chair and 2 members). Committee will nominate a president, first vice-president, second vice-president, secretary and treasurer. The slate will be presented at the next meeting.
- Decide on a name for the unit. Suggestions include:

- \_\_\_\_\_ Retired Teachers Association
- \_\_\_\_\_ Retired School Personnel Association
- \_\_\_\_\_ Association of Retired School Personnel
- \_\_\_\_\_ County Retired Teachers Association

- Other
- Decide on local dues. State dues are voted by the House of Delegates.
- Set a deadline for paying dues to become a charter member.
- Appoint a bylaws committee to draft proposed policies and procedures that are in compliance with the TRTA Bylaws (due at next meeting).
- Announce the date, time and location of the next meeting.
- Name a telephone committee to remind members of the next meeting.
- Adjournment.

# Agenda for the Second Organizational Meeting (Suggested)

Organizational meeting of the \_\_\_\_\_

Temporary Chair:

- Welcome and introductions of visitors
- Report from nominating committee; ask for nominations from the floor; elect officers.
- District president or another TRTA member will install new elected officers.
- New president presides. New secretary takes minutes (required to be sent with request for affiliation).
- Report from the bylaws committee; discuss and adopt policies and procedures in compliance with the TRTA Bylaws.
- President announces committees needed (may have a sign-up sheet), including legislative, retirement education, healthy living, community volunteer service, informative and protective services, member benefits, membership (first vice-president) and public relations (second vice-president). Additional committees may be appointed if needed.
- Select an item in the tax reporting option form [here](#).
- Treasurer will collect state and local unit dues.
- Select a bank.
- Select a date, time and place for the next meeting; consider ideas for regularly scheduled unit meetings.
- Apply for the Certificate of Affiliation Request [here](#).
- Activate the telephone committee to remind members of the next meeting.
- Adjournment.

Prior to the next meeting, the president will appoint all committee chairs, historian and parliamentarian. Schedule a meeting with the treasurer and secretary to meet with official from the bank of choice to set up the unit's bank account.

Schedule a board meeting (elected officers) or an executive committee meeting (elected officers and appointed chairs) to plan meeting dates, times and location(s) for the year. Suggested options for meeting location(s) include:

- Restaurants (lunch meetings are very popular)
- Library (afternoons with refreshments)
- Saturdays (schools or boardroom)
- Churches (some charge a fee)

At the next meeting, invite the district president to attend to present the Certificate of Affiliation. Celebrate!