



# **TEXAS RETIRED TEACHERS ASSOCIATION**

*TRTA: The Voice For All Public Education Retirees*

## **FIRST VICE-PRESIDENT/ MEMBERSHIP**

**RESOURCE GUIDE**  
2020-2022



# First Vice-President/Membership Quick Start Guide

## Important Dates to Remember

**TRTA Membership Year runs July 1 to June 30 of the next year**

- **March 1:** Local Unit Membership Incentive Begins
- **March 1:** Dues Payments Received Deferred to Next Membership Year
- **Early March:** State Office Mails Membership Information Packet to Local Unit Presidents and Treasurers
- **May 1:** Local Unit Officers Data Collection Information Due to State Office
- **June 30:** Local Unit Membership Incentive Ends
- **July 1:** Membership Year Begins
- **December 1:** District Officers Data Collection Information Due to State Office
- **February 15:** Last TRTAConnect Submission for Membership Year
- **February 28:** Final Membership Count Calculated (Determines Delegates During in Convention Years)

## Ongoing Dates to Remember

**15<sup>th</sup> of Each Month:** TRTAConnect Submissions Due

**25<sup>th</sup> of Each Month (Except December):** TRTAConnect Funds Drafted from Local Unit bank account

### TRTA State Office Support Staff

800-880-1650 or 512-476-1622

[membership@trta.org](mailto:membership@trta.org)

## TRTA Membership Programs and Resources

Learn more about each program in the First Vice-President Membership Resource Guide or online at [www.trta.org](http://www.trta.org)

- **TRTAConnect:** Local Units can submit new and renewing members online each month through the TRTAConnect portal. Only one submission is allowed per month and is due by 11:59 PM on the 15<sup>th</sup>.
- **Local Unit Membership Incentive:** Local Units recruit and renew as many members as possible between March 1 and June 30 for a chance to win one of eight \$500 cash prizes.
- **Online Customizable Local Unit Membership Brochure:** This document is available in the member resources section of the TRTA website.
- **Membership Rosters and At-Large List:** This is available to Local Units in real time through the TRTAConnect portal.
- **Individual Membership Incentive (Formerly EOBO):** In each TRTA District, individual members will have a chance to win one of four \$25 prizes.
- **District/Local Unit Awards:** Growth awards for Districts and Local Units are presented at the TRTA Convention; they are calculated on members added as well as overall percent growth
- **Local Unit Growth Incentive:** Local Units receive \$10 for each member added when compared to the previous membership year.

### Other Helpful Numbers

Teacher Retirement System of Texas: 800-223-8778

TRS-Care: 888-237-6762

Association Member Benefits Advisors: 800-258-7041

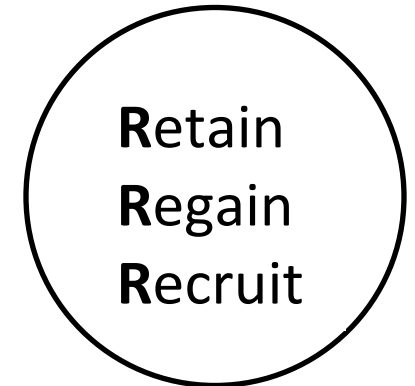
# Purpose of the Membership Committee

Membership Committee Policy: The TRTA Membership Committee shall promote the organization of new local units and develop plans to encourage membership in local units, districts and in TRTA. The committee shall collaborate with other standing and special committees as appropriate to further the mission of TRTA.

## Suggested Activities

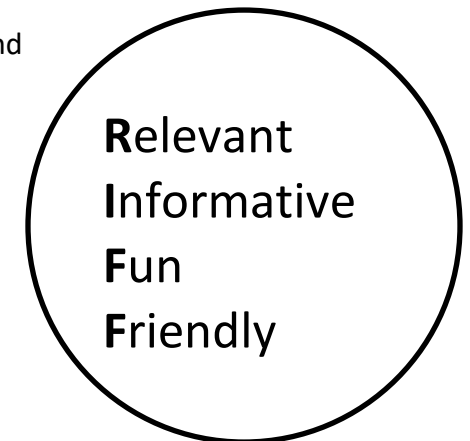
### The TRTA State Membership Committee Chair:

1. Develop with committee members a membership campaign plan.
2. Introduce the TRTA membership campaign plan to the district chairs and enlist their cooperation.
3. Communicate with district membership committee chairs to coordinate TRTA and local unit membership goals.
4. Work with other TRTA committee chairs to coordinate membership campaign activities.
5. Serve as presenter to train district and local unit counterparts at the TRTA Convention.



### The TRTA District Membership Committee Chairs:

1. Introduce the TRTA membership campaign plan to the local unit chairs and enlist their cooperation;
2. Establish a list of assignments, including who is responsible, and when each task is to be completed;
3. Request reports on accomplishments of assigned tasks;
4. Report the TRTA and district membership growth at the District Fall Conference and the Spring Leadership Development Conference;
5. Stimulate the organization of new local units and strengthen weak units;
6. Serve as presenter of the local unit membership training at the Spring Leadership Development Conference; and
7. Attend the TRTA Convention first vice-president training session.



### The TRTA Local Unit Membership Committee Chairs:

1. Relate information received from TRTA and district membership committee chairs to local unit members;
2. Develop a plan to involve members to recruit, retain, and regain members;
3. Report membership progress at each meeting;
4. Establish a list of assignments indicating who is responsible and when each task is to be completed;
5. Request reports on accomplishment of assigned tasks;
6. Work with retirement education committee chair; and
7. Attend the first vice-president/membership training session at the Spring Leadership Development Conference and, if possible, attend the first vice-president/membership training session at the TRTA Convention.

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# First Vice–President

## Duties

### The TRTA State First Vice–President shall:

1. Preside at appropriate TRTA meetings in the absence of, or at the request of, the president;
2. Serve as the chair of the TRTA Membership Committee;
3. Develop, with the TRTA Membership Committee, a plan of action for the year;
4. Serve as a membership resource to assist districts and local units; and
5. Perform other assigned duties to fulfill the objectives of TRTA.

### The TRTA District First Vice–Presidents shall:

1. Preside at district meetings in the absence of, or at the request of, the district president;
2. Serve as district membership committee chair and appoint its members;
3. Distribute TRTA membership information to the local units;
4. Assist local units in developing membership campaign plans;
5. Monitor and support local unit membership activities;
6. Work with the District President to determine the awarding of the four \$25 individual membership incentives funded by the State office;
7. Identify district areas where local units are needed and assist in their development; and
8. Perform other assigned duties to fulfill the objectives of TRTA.

### The TRTA Local Unit First Vice–Presidents shall:

1. Preside at meetings of the local unit in the absence of, or at the request of, the local unit president, and act for the president in his or her absence or inability to serve;
2. Serve as chair of the membership committee for the local unit and appoint its members;
3. Develop a plan to involve members to recruit, retain, and regain;
4. Promote the individual membership incentive as determined by the District leadership;
5. Keep the district membership committee chair informed of membership status and activities; and
6. Perform other assigned duties to fulfill the objectives of TRTA.
- \*7. Assist the president.
- \*8. Attend the District Fall Conference.
- \*9. Attend the Spring Leadership Development Conference as the incoming first vice–president.
- \*10. Attend the first vice–president training session at the Spring Leadership Development Conference and if possible attend the first vice–president training session at the TRTA Convention.

\* Suggested activities

## Membership Drive Basic Guidelines

The treasurer and First Vice-President/Membership Chair must work together on this task. The basic responsibility for the membership chair and membership committee is to **RETAIN** current members, **REGAIN** former members and to **RECRUIT** new members. The basic responsibility of the treasurer is to receive and deposit dues, and send membership dues to TRTA office in a timely manner. Although these are the basic duties of each position, there are times when an overlap of duties does occur, making a close working partnership essential.

### January - February

Local units begin planning a membership campaign to implement for the upcoming membership year. The campaign plan should include attainable goals, activities set to attain goals, and ways to measure the results and should include methods of contacting the at-large members. The goals and activities will focus on **RETAINING** current members, **REGAINING** former members who have dropped out of TRTA and the local unit, and **RECRUITING** new members. The state membership brochure will be reviewed and revised, if necessary.

### March

Local units implement their membership campaign plans. The TRTA membership report (a computer printout of all TRTA annual active, inactive and terminated members in the local unit) is sent to the treasurer and membership chair. The Treasurer and First Vice-President will begin ongoing review of membership data for address corrections and changes and report changes to the TRTA office. Begin submitting membership report via USPS mail or TRTAconnect and continue to do so each month.

### March 1-June 30

TRTA Local Unit Membership Incentive occurs.

### July - August

Local unit membership list should be compiled for the yearbook.

### September - December

State office sends renewal notices. Local units are encouraged to continue to contact members and former members who have not renewed.

### January - February

Membership dues arriving at the TRTA office **before** March 1<sup>st</sup> will be credited to the current membership year, unless otherwise noted by the treasurer. Membership dues arriving **after** March 1<sup>st</sup> will be credited on the subsequent membership year. This is done because the last day of February is the cutoff date for determining the following:

1. Number of delegates for the annual convention
2. Final membership totals used to determine district and local unit awards for the highest number and highest percentage increase
3. Final number for the "Incentive Program" (if applicable)

**Relevant  
Informative  
Fun  
Friendly**

### **RIFF**

Keep your efforts and programs **relevant, informative, friendly and fun** to maximize on retaining, regaining, and recruiting members!

# Membership Retention

## Orientation

Orientation is necessary to motivate a member about the organization and the organization's work. Concentrate on providing organizational structure, promotion of annuities and health care for retirees, member benefits, and local community service. Remember that organizational history is much more important to those that helped make it, but much less important to new members who were not involved. Ask new members what they would like to know about the local unit, the district and TRTA. A special meeting for new members might be scheduled to initiate orientation. Use current members to cite facts, data, information about TRTA at meetings.

## New Member Involvement

We are often advised that the best way to keep new members is to involve them in a job. Give them ownership by asking them to accept certain responsibilities in the local unit. This is good advice if the new member wants to become actively involved. Certainly the local units can benefit from additional working members. Consider the opposite position. **Some retirees don't join because they don't wish to attend meetings or accept volunteer responsibilities.** Take care of either situation by being candid with new members. **Tell them their involvement is needed and welcomed, but they need be only as active as they wish.** Also, consider offering the first year free or offer reduced membership for new recruits.

## Magnetic Meetings

Plan meetings for different interests throughout the year. Remember that local units now have members whose ages range from fifty to more than ninety years. That presents a difficult, but necessary challenge in program selection. No member should expect to be excited about every presentation. However, if there is a continuous lack of programs which are satisfactory to certain segments of the membership, expect to see a reduction in attendance by that group. Are both women and men considered when planning programs and activities? Are the meeting times, days and places satisfactory for the most members? Do these factors automatically prohibit certain members from attending? Would a meal meeting attract more members or would that cause some to stay away? One way to plan for the wishes of most of the members is to survey the membership once a year. Ask the questions that will provide the needed information. **Plan fun or light activities from time to time, membership involvement, or different scenarios such as a sports game, visiting a historical site, etc.**

## Community Service

There is no better way to get to know another member than working together on a project. There are many needs in every community. Working with the TRTA Children's Book Project is a wonderful opportunity. The list of other available projects is limited only by the extent of our leaders' imaginations. This volunteer involvement also counts for CVS hours!

## RIFF Tips For Meetings (Relevant, Informative, Fun, Friendly)

- Vary the meetings. Do not do the same thing over and over and expect different results.
- Younger retirees are knowledgeable and communicate electronically by email, web sites, blogs, Face Book, and Twitter. The Internet provides you with free marketing opportunities for your association 24/7, 365 days a year!
- They like to work at their own pace, and look for flexibility in their attempt to balance work, family, and volunteerism.
- Keep an up-to-date web site and change the content often.
- Vary your recruitment tactics to include networking at local gathering places. They like networking at least once a month.
- They are looking for a cause, benefits, or legislative answers for their membership dues.
- They want progressive leadership. Leaders must delegate effectively. Poor leadership is the #1 reason why volunteers quit.
- Adopt a local cause to be known for where your members participate. Wear name badges and publicize your participation so everyone can identify your association with the cause. This enables your members to get recognition for a job well done.
- Provide some kind of snacks for a future teachers meeting at the school. Let them know that a state and local associations exist and leave newsletters and contact info with them.
- Publicize meeting calendar.



## Regaining Members

Regaining a member who has not rejoined the organization for one or more years is just as important as recruiting and retaining new members. Recruiting new members and regaining inactive members is the desired goal. It is important to review the local membership list (on TRTAConnect) to assure the renewals are up to date, that deceased members are removed and other member contact information is upto date.

### Identify Lapsed Members

TRTA sends a list of non-renewing members to the local treasurer and the membership chair early in the year. Use this list, along with local unit records, to identify members who are no longer active. Assign these individuals to specific members for personal contact.

### Committee for Personal Revival

When a member becomes inactive, it's time for CPR (**Committee for Personal Revival**) and a personal invitation to the next meeting. Several members on a **CPR** can do wonders in regaining a lost member. One member of the committee making a WE HAVE MISSED YOU, WE NEED YOU, WON'T YOU REJOIN US telephone call or other personal contact may be just the thing. If there is no response or hesitation to communicate by the lost member, attempt to determine if something happened to cause disassociation. A reminder letter is good. Personal contact may succeed with others.

### Make It Fun

Form teams to work on regaining members. Divide the **CPR** Committee into working teams or allow committee members to seek other members as volunteer helpers. Compete for the most members regained. Provide incentives for the team regaining the most members. Use awards, prizes or fun recognitions. Perhaps have a function at which the winning team eats steak and the other team eats hot dogs. Maybe even work out a way to include the regained members in the fun.

# New Member Recruitment

## Identifying Prospects

1. Use At-Large list to determine prospective local unit members. These are sometimes already paid members.
2. Contact local school districts and request names and contact information of both mid-year and end-of-year retirees;
3. Reach out to retirees from past years (focus on third-year retirees);
4. Invite active public school and higher education employees to your meetings;
5. Search out retirees from other areas, and other states, who now reside locally;
6. Check past membership list for those members who have not renewed membership;
7. Encourage and invite others interested in the welfare of retired school and higher education personnel; and
8. Welcome spouses of members.

## Obtaining Information about Prospects

1. Request a list and contact information from the local school districts;
2. Request under the open records act, ISD board minutes for the last four years to discover board approved retirees;
3. At first two meetings and the last two meetings of the year, provide a form for current members to list names of known retirees;
4. Watch local newspaper articles for identification of retiring or retired personnel;
5. Note retiree names that are mentioned by friends, at church, in stores; and
6. Conduct a retirement education event for those who will retire in the next five years and ask for contact information upon sign in.

## Making a Prospect a Member

1. Send personal invitations to social and informational functions, with membership forms, to all known prospects;
2. Use present member volunteers to make personal contact with prospects;
3. Ask to be on the program at retiree receptions and obtain permission to give each retiree an invitation letter containing a membership application;
4. Invite prospects to be guests at meetings;
5. Ask members to recruit prospects from their alma maters;
6. Work with PTA units to help present TRTA membership information to retirees from their campuses;
7. Send a copy of the local unit newsletter to prospects;
8. Provide convincing information about the importance of TRTA at retirement education events;
9. Sponsor a retirement breakfast, luncheon or reception;
10. Provide information about TRTA member benefits; and
11. Unite groups of members to award memberships or have the local unit give first year free, or discounted membership.
12. Submit an article to the local newspaper related to TRTA membership and legislative issues in late spring and/or early summer.

## Connection with Non-joining Members

1. Keep prospect lists, files and databases from year to year;
2. Invite prospects to follow your unit on a website or Facebook page
3. Contact each prospect several times the first retirement year and at least once each year until he or she joins;
4. Ask a current member friend to make personal contact with a prospect (in person, by phone, by letter or email);
5. Send non-joiners the first newsletter of the year, copies of *The VOICE* and legislative updates, and make them aware of *The Inside Line*;
6. At-large members are already members, so send them personal invitations to your local unit meeting by providing a schedule of meeting dates for your local along with a membership application.
7. Recognize new or returning members at every meeting/gathering.

# Membership Reporting Master Key

## Payment Options

Members have 3 options to pay their state membership dues:

1. Annually in full – by cash, check or credit card
2. \$2.92 monthly by TRS deduction (Diamond Plus) – member must be receiving an annuity and must complete the TRS 593 form found on our website *in its entirety*.
3. \$2.92 monthly by bank draft (Diamond Plus) – member provides their account and routing number online through their member profile or sends a voided check with their enrollment form

On state reports, the membership type can help you determine how and when a member pays their dues. Use the following key to determine the membership type and status of an individual.

## Membership Type

**AM = Associate:** pays state dues annually, does not receive a TRS annuity (typically active teachers or spouses)

**CM = Current monthly:** pays state dues monthly by automatic TRS annuity deduction

**DA = Draft Associate:** pays state dues monthly by automatic bank draft deduction, does not receive a TRS annuity

**DM = Draft Member:** pays state dues monthly by automatic bank draft deduction, receives a TRS annuity

**LM = Life Member:** no state dues payment required, pays only local dues

**M = Member:** pays state dues annually, receives a TRS annuity

## Status

**A = Active:** membership is current or only recently expired

**I = Inactive:** membership is not current, no payment received in 2 years

**T = Terminate:** membership is not current, no payment received in 3 years, will be removed from database at end of year

# Diamond Plus – Membership Program

**Diamond Plus provides TRTA members with:**

- Dues paid monthly (convenient deduction of \$2.92 monthly from member's annuity or bank draft) instead of renewing annually

**Diamond Plus advantages include:**

- Eases workload for local units by saving them time and money and makes record-keeping easier.
- Allows TRTA to be better stewards of membership dues by spending less on mailing renewals and more on legislative activity.
- Allows local units to check on member status at any time.

**Please note: any and all TRTA members who wish to become Diamond Plus participants by converting to either current monthly or bank draft methods may do so upon their next renewal.**

**Become a Diamond Plus Member by:**

- Submitting a completed Form 593 to the TRTA State office for payroll deduct. (Members)
- Submitting a completed authorization and voided check for bank draft. (Associate Members and Members)

The Membership Enrollment form and TRS 593 can be found on the TRTA website under Member Resources ([www.trta.org/member-resources](http://www.trta.org/member-resources)) then Membership Forms. Both forms should be sent to the Membership Department at TRTA, who will then deliver the TRS forms to TRS.

## **TRTA Membership Awards Program – District and Local Unit**

The TRTA Awards Program consists of awards, both at the district and local levels.

### **District and Local Unit Membership Awards**

Two district and two local unit membership awards are given based on the district and local unit membership as of March 1 of each year. One certificate is given recognizing the district and local unit with the highest percentage of membership gain and the other is given to recognize the district and local unit with the highest number of members gained. The president of the districts and local units winning the membership awards will receive certificates of recognition, and plaques remain in the TRTA office.

### **The TRTA Incentive Program**

Each year TRTA rewards local units that have increased their membership over the previous year. Membership numbers as of March 1st of the current year are compared to the membership numbers as of March 1st of the prior year. Local units receive \$10 for each additional member over the prior year.

## **Individual Membership Incentive (Formerly Each One Bring One)**

In each TRTA District, individual members will have a chance to win one of four \$25 prizes. It is up to the District to determine how to award these prizes.