



TEXAS RETIRED TEACHERS ASSOCIATION

TRTA: The Voice For All Public Education Retirees

FIRST VICE-PRESIDENT/ MEMBERSHIP/VOLUNTEER SERVICES

**RESOURCE GUIDE
2022-2024**

First Vice-President/Membership Volunteer Services Quick Start Guide

Important Dates to Remember

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

- **March 1:** Local Chapter Membership Incentive Begins
- **March 1:** Dues Payments Received Deferred to Next Membership Year
- **March 1:** Last Day for Districts to Submit Volunteer Hours to the State
- **Early March:** State Office Emails Membership Information Packet to Local Chapter Presidents and Treasurers (Hard copy mailed upon request)
- **May 1:** Local Chapter Officers Data Collection Information Due to State Office
- **June 30:** Local Chapter Membership Incentive Ends
- **July 1:** Membership Year Begins
- **December 1:** District Officers Data Collection Information Due to State Office
- **February 15:** Last Day for Local Chapters to Submit Volunteer Hours for Previous Calendar Year
- **February 28:** Last TRTAPortal Submission for Membership Year
- **February 28:** Final Membership Count Calculated (Determines Delegates During Convention Years)

Ongoing Dates to Remember

- **25th of Each Month (Except December):** TRTAPortal Funds Drafted from Local Chapter bank account

TRTA State Office Support Staff

800-880-1650 or 512-476-1622

Email: membership@trta.org

Additional information may be found on the website:

www.trta.org/membership-committee

TRTA Membership Programs and Resources

- **TRTAPortal:** Local Chapters can submit new and renewing members online through the TRTAPortal.
- **Local Chapter Membership Incentive:** Local Chapters recruit and renew as many members as possible between March 1 and June 30 for a chance to win one of sixteen cash prizes up to \$300.
- **Online Customizable Local Chapter Membership Brochure:** This document is available in the Member Resources section of the TRTA website on the Local Chapter tab.
- **Membership Rosters and At-Large List:** This is available to Local Chapters in real time through the TRTAPortal.
- **Individual Membership Incentive (Formerly EOBO):** In each TRTA District, individual members will have a chance to win one of four \$25 prizes.
- **District/Local Chapter Awards:** Growth awards for Districts and Local Chapters are presented at the TRTA Convention; they are calculated on members added as well as overall percent growth.
- **Local Chapter Growth Incentive:** Local Chapters receive \$10 for each member added when compared to the previous membership year.

Other Helpful Numbers

Teacher Retirement System of Texas (TRS): 800-223-8778

TRS-Care: 888-237-6762

AMBA, for TRTA Member Benefits, including
Dental/Vision Policyholders: 800-258-7041

Purposes of the Membership/Volunteer Services Committee

Promote the organization of new local chapters
Develop goals to increase membership in local chapters, districts, and TRTA
Develop goals to strengthen local chapters
Encourage members to participate in and record volunteer activities in their community

Retain
Regain
Recruit

Relevant
Informative
Fun
Friendly

***ALWAYS SHARE VOLUNTEER OPPORTUNITIES AND IDEAS
WITH OTHER MEMBERS!***

VOLUNTEERING GUIDELINES

- Volunteer hours may be counted for any service provided without pay with a maximum of 12 hours/day.
- Hours spent doing volunteer work are recorded door to door and include prep time.
- Record volunteer hours regularly. A date book or calendar is useful.
- Take pictures of volunteers in action and send to District Membership Chair/Volunteer Services Coordinator or to state Membership/Volunteer Services Committee Chair for inclusion on the TRTA Facebook page. You may also email photos to the state directly at info@trta.org.

WHERE TO VOLUNTEER

1. Schools, Libraries, Museums, and Any Non-Profits
2. Hospitals and Nursing Homes
3. Small Businesses and Business Offices
4. Friends, Neighbors, and Family
5. Senior Citizen Centers and Other Community Services
6. Raising Money for Worthy Causes
7. Church

Suggested Activities for Membership/Volunteer Services Committee Chairs

The TRTA State Membership/Volunteer Services 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/volunteer services committee chairs to coordinate TRTA and local chapter membership/volunteer services goals;
4. Work with other TRTA committee chairs to coordinate membership campaign activities;
5. Serve as presenter to support district and local chapter counterparts at the TRTA Convention;
6. Assimilate and gather community service material of interest to members and send it to the district committee chairs and place information on the TRTA website and mobile app;
7. Work with committee members to develop volunteer service goals; and
8. Write the annual cumulative report of community volunteer hours reported by members.

The TRTA District Membership/Volunteer Services Committee Chairs:

1. Introduce the TRTA membership campaign plan to the local chapter chairs and enlist their cooperation;
2. Report the TRTA and district membership growth at the District Fall Conference and the Spring Conference;
3. Stimulate the organization of new local chapters and strengthen weak chapters;
4. Attend the TRTA Convention first vice-president training session if possible;
5. Serve as presenter of the local chapter membership/volunteer services training at the Spring Conference, if applicable;
6. Disseminate information from the state membership/volunteer services committee and TRTA website and mobile app to the local chapter chairs; and
7. Attend the membership/volunteer services leadership training session at the TRTA Convention if possible.

The TRTA Local Chapter Membership/Volunteer Services Committee Chairs:

1. Relate information received from TRTA and district membership committee chairs to local chapter members;
2. Develop a plan to involve members to recruit, retain, and regain members;
3. Report membership progress at each meeting;
4. Work with retirement education committee chair;
5. Attend the first vice-president/membership/volunteer services training session at the TRTA Convention and, if possible, attend the first vice-president/membership/volunteer services training session at the Spring Conference;
6. Disseminate information from the state and district membership/volunteer service committee chairs and TRTA website and mobile app;
7. Identify local community's need for volunteers and communicate these opportunities to members;
8. Recognize volunteer work of significant interest to the membership at each meeting;
9. Coordinate with the communications chair in publicizing volunteer activities;
10. Keep accurate records of community volunteer hours; and
11. Use the CVS Hours Submit link (trta.org/cvsform) to submit total local chapter CVS hours by February 15. **SUBMIT LOCAL CHAPTER CVS HOURS ONE TIME ONLY!** If you need assistance or need to correct a total, please contact your District or State Membership/Volunteer Services Chair.

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District and Local Chapter First Vice–Presidents

Suggested Activities

The TRTA District First Vice–Presidents:

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

The TRTA Local Chapter First Vice–Presidents:

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

Membership Drive Basic Guidelines

The treasurer and First Vice–President/Membership/Volunteer Services 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 chapters 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 chapter, and **RECRUITING** new members. The state membership brochure will be reviewed and revised, if necessary.

March

Local chapters implement their membership campaign plans. The TRTA membership report (a computer printout of all TRTA annual active, inactive and terminated members in the local chapter) 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 TRTAPortal and continue to do so each month.

March 1–June 30

TRTA Local Chapter Membership Incentive occurs.

July–August

Local chapter membership list should be compiled.

September–December

State office sends renewal notices. Local chapters 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 1st will be credited to the current membership year, unless otherwise noted by the treasurer. Membership dues arriving **after** March 1st 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 TRTA Convention
2. Final membership totals used to determine district and local chapter 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!

The Three R's of Membership: Recruit, Retain, and Regain

Membership always involves recruiting new members, retaining current members, and regaining members who have not chosen not to renew.

The ideas below apply to all three R's of membership. Specific details about marketing to members will be provided via a monthly email from the State Membership/Volunteer Services Committee.

Member Involvement and Volunteerism

Keep all members, those recently recruited and those you've retained, informed about the local chapter, district, and TRTA. Be sure to provide information about the organization's important legislative work: protecting and improving retirement security for ALL TRS retirees, including their annuities and health care.

Also share details about member benefits and local community service opportunities. One of the best ways to get members, new and old, involved is to give them a job! Ask them to accept a responsibility in the local chapter. There is no better way to get to know another member than working together on a project, even a temporary one (like Day at the Capitol). Working with the TRTA Children's Book Project is a wonderful opportunity.

Some retirees don't join because they don't wish to attend meetings or accept volunteer responsibilities. Their involvement is needed and welcomed, but they need be only as active as they wish. There are many needs in every community. The list of other available projects is limited only by the extent of our imaginations. This member involvement also counts for Volunteer Service hours!

Magnetic Meetings

Plan meetings for different interests throughout the year. Remember that local chapters now have members whose ages range from fifty to more than ninety years. That presents a difficult, but necessary challenge.

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.

Consider both women and men when planning programs and activities. Are the meeting times, days, and places satisfactory for the most members? Would a meal meeting attract more members or would that cause some to stay away? One way to plan is to survey the membership once a year. **Plan fun or light activities from time-to-time, or different activities such as a sports game, visiting a historical site, etc.**

Membership Reporting Master Key

Payment Options

Members have 3 options to pay their state membership dues:

1. Annual Payment—Available to members. One time payment of \$35.00 by check, credit card, money order, or recurring annual bank draft.
2. Monthly Payroll Deduction—Available to TRS annuitants. Dues paid in monthly installments of \$2.92 withheld by Teacher Retirement System of Texas (TRS) and paid to TRTA. Option not available to annuitant beneficiaries. The Membership Enrollment form/TRS 593 can be found on the TRTA website here: www.trta.org/member-resources. Both forms should be sent to the TRTA Membership Department who will then deliver the TRS forms to TRS.
3. A membership may be paid annually or by monthly installments through TRTA's approved benefit partner, AMBA, and their payment collection system. The TRTA Board of Directors and AMBA will work together on these options for TRTA members.

Use the following key to determine the membership type of an individual.

Membership Type

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

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

M = Member: pays state dues annually.

**Please note, for membership year 2022–2023, a new ANNUAL Bank Draft member type will be added.

Status

A = Active: membership is current or only recently expired

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

NM = Non-member: some who has either never paid or hasn't paid dues in 3 or more years

TRTA Membership Awards Program – District and Local Chapter

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

District and Local Chapter Membership Awards

Two district and two local chapter membership awards are given based on the district and local chapter membership as of March 1 of each year. One certificate is given recognizing the district and local chapter with the highest percentage of membership gain and the other is given to recognize the district and local chapter with the highest number of members gained. The president of the districts and local chapters 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 chapters 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 chapters 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.

First Vice-President/Membership/Volunteer Services TIPS for the State, District, and Local Levels

- Work with your committee members to develop goals that reflect the overarching purpose of the committee;
- Participate in board meetings;
- Communicate regularly with district and local chapter First Vice-President/Membership/Volunteer Services Chairs;
- Disseminate information from the State Membership/Volunteer Services Committee to district and local chapter First Vice-President/Membership/Volunteer Services Chairs;
- Identify community needs for volunteers and communicate these opportunities to members;
- Recognize volunteer work of significant interest to the membership at each meeting;
- Coordinate with the Communications Committee Chair in publicizing volunteer activities;
- Share articles and photos about volunteer activities with a local newspaper and/or in a newsletter, or feature them on local chapter websites and local chapter and/or TRTA state Facebook pages;
- Collect digital photos of volunteers in action and send to the State First Vice-President/Membership/Volunteer Services Chair or directly to info@trta.org;
 - Photos must be captioned with the district number and/or local chapter name, and should describe the activity, project, or event, and include the names of volunteers/groups in the photos;
 - As a reminder, photos should NOT show the faces of children;
 - As you take photos, make participants aware that photographs taken at TRTA-sponsored events may be featured online or in other TRTA publications

Suggestions for Volunteer Opportunities

Check with the following institutions in your community to find out what volunteer opportunities are available, and consider inviting local organizations and businesses to make a presentation at your meeting discussing ways your members can help.

- Schools, Libraries, Museums and Any Non-Profits
- Hospitals and Nursing Homes
- Small Businesses and Business Offices
- Friends, Neighbors, and Family
- Senior Citizen Centers, and Other Community Services
- Raising Money for Worthy Causes
- Church

Guidelines for Reporting Volunteer Hours

1. Volunteer hours may be counted for any service provided without pay. **(Maximum 12 hrs/day)**
2. Hours spent doing volunteer work should be recorded door-to-door. (Count the hours from the time you leave home until you return. Also count the time spent at home in preparation for doing volunteer work, such as preparation for a speech or teaching a class, baking food, etc.).
3. Opportunities exist in individual communities of which we are not aware. Do research in your own communities to see what volunteer opportunities are available. Make a habit of recording activities on a regular basis. A date book is ideal for keeping track of volunteer hours. (Any volunteer hours may also show indications of mileage for income tax deductions).

TRTA Volunteer Services Local Chapter Online Submit Instructions

(Directions for submitting volunteer hours electronically)

TRTA Local Chapter First Vice-President/Membership/Volunteer Services Chairs are asked to submit the total hours for their local chapter in an electronic format instead of sending in a paper form. This will be an easy and fast way to total local chapter hours into district total hours and total state hours of volunteer service.

The local chapter submission date of volunteer hours for the calendar year is February 15. Submitting earlier than February 15 is also fine. Please note, the last day for the district to submit volunteer hours to the state is March 1.

After collecting all local member hours, add those hours up to get a total number of hours for your chapter, then go to this link to submit the total chapter hours: www.TRTA.org/cvsform. (Click the submit button only once. You will see a confirmation page. Clicking twice will record your hours twice)!

Be sure to submit local chapter volunteer hours ONE TIME ONLY. If for any reason you need to correct that total, please contact the state office (info@trta.org) with the correct number and it will be edited.

TRTA Volunteer Services Hours Report Link (How to View)

Use the link TRTA.org/cvsreport to monitor and view the results of local chapters who have reported and totals for each district and grand total for TRTA state results.