



TEXAS RETIRED TEACHERS ASSOCIATION

TRTA: The Voice For All Public Education Retirees

LOCAL CHAPTER PRESIDENT

RESOURCE GUIDE 2022-2024

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

Local Chapter Presidents Are the Key to TRTA's Success!



The TRTA Local Chapter Presidents:

1. Preside at local chapter meetings, inform local membership on a regular basis about TRTA, district and local chapter activities and work to increase membership.
2. Disseminate TRTA information and report changes of officers or committee chairs to the district president;
3. Serve as coordinator of the awards programs for the local chapter and distribute local chapter awards; and
4. Follow the monthly calendars in the TRTA Leadership Manual and complete other items as assigned to fulfill the objectives of TRTA.

**Effective and happy Local Chapter 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, First VP, Second VP, Secretary and Treasurer help you plan and conduct your meetings

COMMITTEES

Your chapter may have more committees if you so choose

- Legislative
- Membership/Volunteer Services
- Communications
- Retirement Education
- Member Benefits
- It is also suggested that you appoint a Parliamentarian and Historian.
- BECOME FAMILIAR WITH THE LEADERSHIP MANUAL

A MINIMUM OF FIVE (5) MEETINGS

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



Ten Top Tips for Local Chapter 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. Create an atmosphere of **fun** at your meetings so that people want to come and bring guests.
4. 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.
5. Organize your committees **before** you take office in July. For small local chapters, committees may consist of 1 or more members.
6. People don't join only for camaraderie. Have significant **service projects** throughout the year involving different people.
7. Ask your members **what they want** from TRTA and **how they would improve your chapter**.
8. Make sure that you provide ample opportunities to include the **spouses/partners**. Spouses/partners have a significant influence on the member.
9. Meet and work with other Local Chapter 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 Chapter 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.

Important to know:

AWARDS – those given at the local level:

Award templates are sent to local chapter presidents by TRTA.

YEARBOOKS:

AMBA will pay \$100 for use of their advertisement in your yearbook.

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 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 on TRTA website

BUDGET – Work with your Executive Board to develop it!

- 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 and the State Membership Department at TRTA (membership@trta.org).

IMPORTANT DATES

- **November 1** - Districts submit one E.L. Galyean nomination to the 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** - Convention delegate names need to be sent to state on even-numbered years.
- **May 1** - Local officers/committee chairs need to be to state office.

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State and District President

The TRTA State President:

1. Preside at 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, standing committee chairs, and members 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 standing committee chairs;
7. Assume an active role in legislative activities;
8. Monitor the status of districts and local chapters, and support their efforts;
9. Be responsible for the awards program and determine any special recognitions; and
10. Perform other assigned duties to fulfill the objectives of TRTA.

The TRTA District Presidents:

1. Preside at District meetings, participate in budget preparation and appoint committee chairs and liaisons;
2. Visit local chapters, disseminate TRTA information and report district data to the state office;
3. Collaborate with Board of Directors and state committees to increase membership, strengthen local chapters and promote TRTA programs/events; and
4. Follow the monthly calendars in the TRTA Leadership Manual and complete other items as assigned to fulfill the objectives of TRTA,

Presidential Dos

Do Be: Enthusiastic, Positive and Your Chapter 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 standing rules.

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.

Proposed Local Chapter Budget

INCOME

Beginning Balance (<i>Insert date here</i>)	\$ _____
Local Dues (_____ members @ _____ local dues)	\$ _____
AMBA Yearbook Ad (Reimbursement)	\$ _____
TOTAL INCOME	\$ _____

**Line
Item**

EXPENSES

1	Officers: _____ X (6)	\$ _____
2	Committee Chairs: _____ X (#)	\$ _____
3	Mailing/Postage/Copying/Supplies	\$ _____
4	Mailbox Rental - Annual charge	\$ _____
5	Luncheon Venue - Annual charge	\$ _____
6	Door Prizes - Monthly Luncheons	\$ _____
7	Banking Supplies	\$ _____
8	Scholarships (_____ x #)	\$ _____
	State Convention:	
9	LC Delegates _____ x (#) allotment approval from state	\$ _____
10	Memorials & Honorariums	\$ _____
11	Miscellaneous	\$ _____
12	TRTF Annual Donation	\$ _____
	ESTIMATED TOTAL EXPENSES	\$ _____
	PROPOSED TOTAL BUDGET	\$ _____

Parliamentary Pointers

ELECTIONS

If there is only one nomination, the election may be done by acclamation: "Hearing no other nominations, _____ is elected!" A motion "to close nominations" is never required. Once nominations have ceased, a vote to close nominations would be a waste of the Assembly's time. Just remain silent and proceed with the election.

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 VOTE

More than half of the votes cast. (Abstentions do not count). If there are more votes in favor than against, you have a majority vote.

MINUTES

A formal motion is not necessary to approve the minutes. Say "The secretary will read the minutes of the _____ (date) meeting." If the minutes have been sent electronically or distributed in printed form, it is not necessary to read them. Say "A draft of the minutes of the _____ (date) meeting has been distributed." Minutes and corrections to the minutes may be approved by unanimous consent. Say "Are there any corrections?" With each correction, say "If there is no objection, the correction will be made." Pause. "Are there any further corrections?" Pause. "Hearing none, the minutes are approved (or approved as corrected)."

UNFINISHED BUSINESS

Unfinished Business is any item that was not completed at the previous meeting or that was postponed to the present meeting. Otherwise, there is no Unfinished Business. Never ask if there is Unfinished Business, as the chair and the secretary should know beforehand (check the minutes). Simply announce the items and take them up. The term "Old Business" is confusing and should be avoided, since it refers to everything that was done in the past.

PREVIOUS QUESTION or CALL FOR THE QUESTION

This motion, if seconded and adopted by 2/3 vote, stops debate and causes an immediate vote on the pending motion.

RESPECTFULLY SUBMITTED

Is no longer used. Person reporting should just sign their name to the report.

SAME SIGN/VOTING

When the chair takes the vote, do NOT use "Same Sign." Instead say "Those in favor say 'aye.' Those opposed, say 'no.'" (Same sign is ambiguous and confuses those wishing to answer in the negative).

SAY "I MOVE THAT"

Never say, "I so move." State the entire motion so Assembly will know what the question is. Have maker write down the motion, particularly if it is a long or complicated one, and hand it to the chair.

TABLE

The motion to "Lay on the Table" should only be used for a matter of urgency. Example: If an unexpected VIP enters the hall but there is already a motion pending, say "Is there any objection to laying the pending motion On the Table in order to hear from VIP?" Once the urgency has been handled, say "Is there any objection to Take from the Table the motion that was pending earlier?"

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).

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, by law, 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 was 6.8% in 2019, increased to 7.5% for 2020 and 2021, increased to 7.75% in 2022, will increase to 8.0% in 2023, and finally will reach 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 contributed 1.5% through 2020, but this increased to 1.60% in 2021, and will further increase to 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

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