



# TRTA Strategic Plan

Adopted October 2009

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**Mission:** TRTA advocates for improved benefits for all public education retirees and promotes the well-being of its members.

**Vision:** Retired and active public school employees will fully understand the value of the TRS defined benefit plan and the importance of protecting and enhancing their retirement benefits.

## CONTENTS

1. Government Affairs
2. Membership Developments, Benefits and Service
3. Communications and Public Relations
4. Organizational Excellence

**1. Government Affairs** – TRTA will be the voice of all public education retirees in advocating for their pension benefits and well-being.

1.1. Continuously advocate for an actuarially sound pension fund, regular pension increases, and the preservation of the TRS defined benefit pension plan.

*(Legislative Coordinator and Executive Director)*

1.1.1. Advocate for a better TRS-Care program including additional funding, controlled premium costs, enhanced benefits, and the goal of a state TRS-Care Trust Fund. *(Legislative Coordinator and Executive Director)*

1.2. Continue a system for educating lawmakers, legislative staff, Legislative Committee, and the membership. *(Legislative Coordinator and Executive Director)*

1.3. Identify specific lawmakers who have the greatest impact on TRTA issues. *(Legislative Coordinator and Executive Director)*

1.3.1. Encourage local units and members to build a relationship with lawmakers. *(Legislative Committee)*

1.3.2. Identify the *staff* members of lawmakers to build meaningful relationships. *(Legislative Coordinator and Executive Director)*

1.4. Use technology necessary to expedite legislative effectiveness. *(Executive Director and Finance Committee)*

- 1.5. Work with state and national coalitions which benefit TRTA. *(Executive Director)*
- 1.6. Identify the mutual interests of TRS and TRTA to enhance their relationship. *(Legislative Coordinator and Executive Director)*

**2. Membership Development, Benefits, and Service** – TRTA will provide valued member benefits and services to promote recruitment and retention.

- 2.1. Develop a campaign to increase membership to 100,000 by 2010 and allocate the resources to carry out the strategy. *(Membership Committee)*
  - 2.1.1. Assist local units to recruit and retain members by developing incentives or rebates for greatest membership growth and retention rates.
  - 2.1.2. Develop incentives for member retention at the local level. *(Membership Committee)*
  - 2.1.3. Implement the membership tagline “Each One Bring One” into action. *(Membership Committee)*
  - 2.1.4. Develop and implement strategies to support membership during emergency situations. *(Membership, Emergency Response and Information & Protective Services Committees)*

- 2.2. Increase the involvement and participation of members to instill commitment, leadership and a sense of ownership. *(Membership Committee)*
  - 2.2.1. Determine member needs and interests using technology. *(Membership Committee)*
- 2.3. Provide meaningful benefits and services. *(Member Benefits Committee)*
  - 2.3.1. Maintain and improve upon existing benefits and agreements with providers. *(Member Benefits Committee)*
  - 2.3.2. Develop new benefits and services as appropriate. *(Member Benefits Committee)*
  - 2.3.3. Promote the benefits and services. *(Member Benefits and Retirement Education Committees)*
- 2.4. Consider new or targeted categories of membership. *(Membership and Membership Research Committees)*
  - 2.4.1. Target support *personnel* to join; customize the approach for various targeted prospective members. *(Membership and Membership Research Committees)*
  - 2.4.2. Maintain a spirit of cooperation with the Association of School Administrators and other allied associations. *(President and Executive Director and/or Board of Directors and/or Retirement Education Committee)*

2.5. Study stepped dues categories of membership. (*Membership and Membership Research Committees*)

**3. Communications and Public Relations** – TRTA will provide resources to implement effective public relations initiatives and internal communications.

### **External Communications**

3.1. Develop public relations efforts to promote awareness, educate and engender support among all audiences, including: 1) active teachers, 2) public education retirees, 3) government officials, 4) media, and 5) the public about the role and benefit of the Teacher Retirement System of Texas and TRTA. (*PR Committee, Retirement Education Committee, Member Benefits Committee, Legislative Committee*)

3.1.1. Develop and distribute an ongoing communication campaign that provides a public relations packet which includes templates for press releases, public service announcements, PowerPoint presentations; letters to the editor and letters to legislators; tips for working with government officials and the media; and a TRTA style sheet.

3.1.2. Develop an ongoing campaign to educate active school personnel about the financial basis of the TRS Fund and TRS-Care, as well as the function and purpose of TRTA.

- 3.2. Promote TRTA, retirement information, and the *importance* of retirement information, in as many venues as possible each year with focus on information awareness and membership enrollment. *(Retirement Education Committee, Member Benefits Committee, Membership Committee, local members)*
  - 3.2.1. Encourage local units to utilize a variety of methods and venues to provide information to active school personnel regarding TRS and TRTA.
  - 3.2.2. Assist districts and local units in planning retirement education events.
- 3.3. Develop a TRTA Style Manual to help identify the organization, with special focus on the following: *(Public Relations Committee, staff)*
  - 3.3.1. Determination of a consistent phrase, such as “public education retirees.”
  - 3.3.2. Adoption of logo and stationery usage.
  - 3.3.3. Establishment of association colors and printing styles.
  - 3.3.4. Provision of consistency in message.
  - 3.3.5. Distinction among units, districts, endorsed providers, and TRTA.
- 3.4. Determine the most appropriate name for TRTA as associations change from “teachers” to other titles.

## Internal Communications

- 3.5. TRTA standing committees will network among themselves to ensure the consistency of the TRTA message. *(all standing committees)*
  - 3.5.1. Utilize TRTA website and links to committee pages for each committee so members know what other committees are doing. *(all standing committees, staff)*
- 3.6. Enhance TRTA website for greater capabilities in serving the members and promoting communications. *(staff)*
- 3.7. Improve communication with districts and local units. *(officers, all standing committees, all ad-hoc committees, district presidents, staff)*
  - 3.7.1. Develop clear, concise communication with districts and local units regarding the work of TRTA.
  - 3.7.2. Promote district and local unit leadership responsibility for communication with members.
  - 3.7.3. Establish a system for direct communication between state standing committee members and their district cohorts. *(all standing committees)*
- 3.8. Promote the message, “Career plans include retirement plans.” *(officers, all state committees, staff)*

- 3.9. Utilize the new tagline: “TRTA: The Voice for All Public Education Retirees” *(officers, all state committees, staff)*
- 3.10. Utilize communications that reflect the diversity of the membership. *(officers, all state committees, staff)*

**4. Organizational Excellence** – TRTA will develop and maintain a governance and management infrastructure to make it the model state association for education retirees.

- 4.1. Maximize use of the volunteer leadership network. Improve the volunteer infrastructure as needed for TRTA growth. *(President, Board of Directors, Executive Director, district presidents, local presidents, Community Volunteer Service Committee)*
  - 4.1.1. Develop more effective leadership training in TRTA. *(Leadership Training Committee, staff)*
  - 4.1.2. Provide annual leadership training for the District Presidents and, as needed, for Standing Committee Chairmen. *(Leadership Training Committee, officers, state committee chairs)*
  - 4.1.3. Provide annual leadership training for the Board of Directors. *(President, Leadership Training Committee, Executive Director, staff)*

- 4.1.4. Govern as a Board by staying focused on the mission and strategic goals, and developing policy, being visionary and acting with fiduciary care. *(Board of Directors)*
- 4.2. Develop professional staffing to match the growth of TRTA's membership and programs. *(Board of Directors, Executive Director)*
  - 4.2.1. Identify and use standards to evaluate the needed staff positions including comparison to added work requirements and anticipated growth. *(Executive Director)*
  - 4.2.2. Ensure adequate quality physical workspace for staff in the office. *(Executive Director)*
  - 4.2.3. Fund and expand professional development opportunities for training of TRTA staff. *(Board of Directors and Executive Director)*
- 4.3. Review existing committees and their structures for possible improvement. *(Board of Directors)*
  - 4.3.1. Hold committees accountable by defining their missions and assigning responsibilities from the strategic plan. *(Board of Directors)*
  - 4.3.2. Provide and fund for adequate staff support for committees. *(Board of Directors, Executive Director)*

- 4.3.3. Encourage the Organizational Affairs Committee to be proactive in communicating with other committees. *(President)*
- 4.4. Review the Bylaws with intent to sunset obsolete bylaws and to recommend changes through a series of proposed amendments annually. *(Organizational Affairs Committee)*
- 4.5. Review the annual independent audit. *(Board of Directors)*
  - 4.5.1. Review accounts payable documentation on a semi-annual basis. *(Audit Committee)*
- 4.6. Encourage and assist local units in their operating structure to protect TRTA, including federal ID number, appropriate check-signing policies, and minimal insurance standards. *(staff)*
  - 4.6.1. Develop training for local unit treasurers using technology such as CDs, DVDs and webinars. *(Secretary-Treasurer, Finance Committee and staff)*
- 4.7. Enhance the relationship and offer cooperation to the TRT Foundation in achieving mutual goals. *(Board of Directors and Executive Director)*
  - 4.7.1. Maintain interest in the success of the Trinity Center and its relationship with TRTF and TRTA to ensure fiscal responsibility. *(Board of Directors and Executive Director)*