



TEXAS RETIRED TEACHERS ASSOCIATION

Strategic Plan

*Adopted by Board of Directors
October 13, 2005*

A strategic plan serves as a “roadmap” for an organization. It provides a framework and philosophy for governing (leadership) and managing (staff).

The following persons participated: Jack Felts - TRTA President; Tom Pritchard - Immediate Past President; Aubrey Cherry - 1st Vice-Pres.; Dora H. Scott-Nichols - 2nd Vice-Pres.; Herb Norris – Secretary/Treasurer; Corky Pence - DPC. Chairman; Glenda Nelson -DPC Vice-Chairman; Janice Bond -DPC Recorder; Jack Lavy - Organization Affairs Coordinator.; Ruben Saenz – Historian; Kenneth Laycock -TRTF President; Dorothy Nash –Community Volunteer Service Committee Chairman; Gaynell High - Health Care Committee Chairman.; Mary Sexton -I & PS Committee Chairman; Donna Cost – Leadership Training Committee Chairman; Albert Campbell -Member Benefits Committee Chairman; Martha Kallus - Pre-Retirement Committee Chairman; Derly Rivera - Legislative Coordinator; Tom Rogers – Legislative Committee Co-Chairman; Barry Thompson; Bob Richards -Past President; and Buddy Sexton –Leadership Training Committee Alternate.

TRTA staff included Tim Lee, Executive Director, and Linda de los Santos, Associate Executive Director.

Bob Harris, CAEⁱ, facilitated the planning retreat. He described the strategic planning process and referenced the book *Good to Great*¹ by Jim Collins. Concepts from the book include the BHAG – “big hairy audacious goal,” and maintaining a focus on the TRTA mission.

To prepare, he reviewed TRTA governing documents, visited with staff, and received input from Board members about their desired outcomes for the meeting and their recommended goals.

Duration of the Plan: 5 Years

It was decided that the plan would cover a period of five years: 2005 – 2010.

¹ A BHAG should be a longer-range goal that requires additional resources, creativity, efforts and results in significant benefit to the association and members.

Plan Sustainability

The plan should be the primary guide for elected presidents. Annually it should be reviewed for progress; and completely updated at a Board retreat every three to five years. The staff may develop a program-of-work or annual business plan to ensure the necessary administrative steps are in place to advance the plan.

The chairman of the Strategic Planning Committee should serve as the “plan-champion” to monitor and report on progress or set backs.

Planning Terms

The **mission statement** should identify the organization, whom it serves and what it offers. A **vision statement** is how the organization envisions itself in the distant future. A **values statement** identifies the guiding principles of leadership and staff.

A **goal** is synonymous with an objective and is broad in scope. The stated goals should drive most efforts, including budgeting, staffing and committee assignments.

Within each of the goals are **strategies**. The strategies are suggested approaches for achieving the mission, vision, and goals.

Mission, Vision, Values and Tagline

The existing mission statement was reviewed and amended. Vision and values statements were added. The existing tagline was changed.

Mission Statement – Existing

TRTA shall promote the professional, economic, intellectual, social, and physical well-being of its members; shall encourage volunteer opportunities in the community; and, shall provide advocacy for improved retirement benefits for all public school and higher education retirees.

Mission Statement – NEW

The Texas Retired Teachers Association advocates improved benefits for all education retirees and promotes the well-being of its members.

Vision Statement – NEW

The Texas Retired Teachers Association is the **premier voice** of education retirees in promoting member interests and supporting public education.

Values Statement – NEW

The guiding principles for governing and managing the Texas Retired Teachers Association include the Code of Ethics and the following values:

- ◆ Integrity, honesty, and openness in making and carrying out decisions.
- ◆ Fellowship and respect among volunteers and staff.
- ◆ Focus on member needs and their well-being.
- ◆ Coalition building and partnerships to benefit TRTA.
- ◆ Respect for diversity and inclusivity.
- ◆ Volunteerism in the community.

Tagline - Existing

The largest retired teachers association in the nation working for the well-being of its members.

Tagline - NEW

TRTA: THE Voice for Education Retirees

Four goal categories were identified as follows:

- 1. Government Affairs**
- 2. Membership Development, Benefits and Services**
- 3. Communications and Public Relations**
- 4. Organizational Excellence**

The following strategies were developed to advance the four goals. Items noted in *italics* reference specific actions detailed at the meeting.

1. **Government Affairs** – TRTA will be the premier voice of education retirees in advocating for their pension benefits and well-being.
 - 1.1. Continuously advocate for a solvent pension fund, regular ad hoc pension increases, and the preservation of the defined benefits pension plan.
 - 1.1.1. Advocate for a better TRS-Care program including additional funding, reduced premium costs, enhanced benefits, and the long-term goal of a state TRS-Care Trust Fund.
 - 1.2. Continue the TRTA Lobby Day at the Capitol as a means for educating lawmakers, legislative staff members, and involving the membership. *Schedule in mid-April, mid-week in odd number years in Austin.*
 - 1.3. Strategically identify specific lawmakers who have the greatest impact on TRTA issues.
 - 1.3.1. Assign Local Units and members to build relations with key lawmakers.
 - 1.3.2. Identify the *staff* members of key lawmakers to build meaningful relationships.
 - 1.4. Develop and fund the technology necessary to expedite legislative effectiveness and victories, including:
 - 1.4.1. Toll-free TRTA phone number members can utilize to communicate with lawmakers.
 - 1.4.2. Software to expedite communications by legislative districts – aligned with Local Units. Advise members of its capability and availability.
 - 1.5. Lead the development of coalitions to best position TRTA.
 - 1.5.1. Appoint a TRTA “Coalitions Task-Force” (composed of members of the Campaign Communications Committee) to reach out to active school personnel associations.
 - 1.5.2. Assemble the *One Million Coalition* by inviting the decision-makers to coalesce, led by TRTA.
 - 1.5.3. Assemble the 14 largest state retired teacher associations to position TRTA as the expert and leader in public pension issues. *Start with GPO-WEP – an immediate action in 2005.*

- 1.5.4. Identify the mutual interests of TRS and TRTA to enhance relations. *Get all the documents and maintain at TRTA.*
- 1.5.5. For the purpose of more effective participation in government affairs, consider creation of TRTA councils or branch affiliates to involve subgroups of the organization; i.e. Council of Custodial Personnel, Council of Coaching Personnel, Retired School Administrators, etc.
- 1.6. Prioritize the issues of importance to members by utilizing the State Legislative Committee and a survey of the members to select the six items of most importance. *Consider the use of an electronic survey mechanism in addition to Local Unit surveys.*
 - 1.6.1. Utilize the results and positions of the survey as a catalyst for convening the coalitions.

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 from 60,000 to 100,000 by 2010 or sooner. *Membership Committee to define steps and make recommendations to Board.*
- 2.1.1. Allocate the resources to carry out the strategy.
- 2.1.2. Initiate steps to hire a TRTA field person with responsibilities for membership development, retention, and Local Unit assistance. *Executive Director to develop job description; amend budget for 2006 and implement in 2006 or no later than 2007. Consider the position a pilot program and evaluate effectiveness after two years*
- 2.2. Increase the involvement and participation of members to instill loyalty, leadership and a sense of ownership.
- 2.2.1. Determine member needs and interests with electronic surveys (e.g., Zoomerang, SurveyMonkey) and district/local focus groups. *Membership Committee to develop survey content by fall 2005.*
- 2.3. Provide meaningful benefits and services to members.
- 2.3.1. Maintain and improve upon existing benefits and agreements with providers. *Responsibility of the Member Benefits Committee and staff.*
- 2.3.2. Develop new benefits and services as appropriate.
- 2.3.3. Promote the benefits and services to members. *A combined effort of Membership Committee and Public Relations Committee.*
- 2.4. Consider new or targeted categories of membership. *Membership Committee to research and report to the Board in January 2006.*
- 2.4.1. Consider pre-vestment and vested membership categories.
- 2.4.2. Explore virtual and out-of-state membership categories.
- 2.4.3. Target ancillary *personnel* to join; customize the approach for various targeted prospective members.
- 2.4.4. Focus campaign on associate members.
- 2.4.5. Maintain a spirit of cooperation with the Association of School Administrators and other allied associations.

- 2.5. Study stepped dues categories of membership, e.g.:
 - 2.5.1. Continuing memberships – payroll deductions -- \$25 year
 - 2.5.2. One-year membership purchase -- \$36 year.
 - 2.5.3. Discount for 3rd and 4th year of \$30 year.
 - 2.5.4. Formulate rebates to chapters accordingly.
- 2.6. Review the feasibility and cost-effectiveness of holding an annual conference and trade show.
- 2.7. Explore new cost-effective networking opportunities for members. *For example, golf outings with sponsors offsetting the costs.*

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 educate all audiences, including: 1) active teachers, 2) 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.
- 3.1.1. PR Committee to develop an immediate on-going multi-year communication campaign that utilizes press releases, press conferences, press and informational kits, statewide road shows, etc.
- 3.1.2. Utilize a marketing expert, outsourced PR professional, or in-house communications person to develop ways to carry the message. *Suggested that TRTA only promote one primary message during the year. Consider the pending proposal for public relations assistance immediately.*
- 3.1.3. Consider making available the use of newspaper clipping service, public service announcements, press kits, and press releases to generate free publicity and make available to District and Local Unit leaders.
- 3.2. Promote TRTA, retirement information, and the *importance* of retirement information, in as many venues as possible each year with an eye on information awareness and membership enrollment. *Pre-Retirement Committee to map strategy and implement.*
- 3.2.1. Utilize in-service presentation opportunities to promote awareness of TRS and TRTA; and provide for consistent delivery and message for the presenters.
- 3.2.2. Assist Local Units in their seminars, distinguished service dinners, posters, etc.
- 3.2.3. Establish a model to assure a smooth transition from active school personnel to education retiree.
- 3.3. Develop a TRTA Style Manual to help brand the organization, with special focus on the following: *Responsibility of the PR Committee with a deadline of Winter 2006)*
- 3.3.1. Determination of the consistent phrase, “**education retiree.**”
- 3.3.2. Proper logo and stationery usage.
- 3.3.3. Association colors and printing styles.
- 3.3.4. Consistency in message.
- 3.3.5. Distinction between units, districts, endorsed providers, and TRTA.

3.4. Determine the most appropriate name for TRTA as associations change from “teachers” to “education retirees.”

3.4.1. Discuss at 2005 national meeting and report to Board.

3.4.2. Report on the variations of names across the U.S.

3.4.3. Ask legal counsel about the impact of any name change on corporate and IRS requirements.

Internal Communications

3.5. PR Committee to interface with all committees to ensure consistency in message and delivery of the message.

3.5.1. Try to coordinate a single day of meetings for all committees.

3.5.2. Utilize website and a page for each committee so members know what other committees are doing.

3.5.3. Liaison from the PR Committee to monitor messages and needs of all committees. *In place by 2006-2007.*

3.6. Website to be enhanced for greater capabilities in serving the members and promoting communications.

3.6.1. On-line collaboration for committees.

3.6.2. Consistency of message in the District/Local Unit pages on the TRTA website.

3.6.3. Facilitate BLOGs.

3.7. Improve ways to reach members directly in order to remove any filters or delays caused by Districts or Local Unit communications.

3.7.1. Develop clear concise messages for Districts and Local Units.

3.7.2. Promote Districts and Local Unit leadership accountability for delivering the messages to members.

3.7.3. Educate members as to the many successes of TRTA.

3.7.4. Consider writing “The Worst Case Scenario for Education Retirees” considering how different things would be if TRTA had not existed over the last 50 years.

- 3.8. Promote a consistent and concise message; with campaigns that last nine to 12 months so message impact can be significant and measured.
- 3.8.1. Develop the message (or similar message): “**Retirement Plans are Part of Career Plans**,” or “Retirement Begins the Day You Hire.”
 - 3.8.2. Utilize the new tagline: “**TRTA: THE** Voice for Education Retirees”
- 3.9. Utilize communications that reflect the diversity of the membership.

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.
- 4.1.1. Develop more effective leadership training in TRTA.
- 4.1.2. Sponsor a statewide multi-day district and local leadership training summit; advising not only about the association but specific steps and processes to be successful. *Include government affairs education; implement in the summer or fall of 2006 and every even year thereafter. Seek sponsors and partners to implement. Cooperative efforts of Organizational Affairs and State Legislative Committees.*
- 4.1.3. Provide annual leadership training for the Board of Directors and District Presidents, along with the “Leadership Manual.”
- 4.1.4. Govern as a Strategic Board by staying focused on the mission and strategic goals, and developing policy, being visionary and acting with fiduciary care.
- 4.2. Develop professional staffing to match the growth of TRTA’s membership and programs. *A responsibility of the CEO to advise Board of costs, responsibilities, etc. Budget for immediate implementation in the 2005 -06 budget.*
- 4.2.1. Identify and use standards to evaluate the needed staff positions compared to added work requirements, anticipated growth, etc.
- 4.2.2. Ensure adequate quality physical workspace for staff in the office.
- 4.2.3. Fund and expand professional development opportunities for training for TRTA staff.
- 4.2.4. Hire a TRTA field person with responsibilities for membership development, retention, and Local Unit assistance. *Duplicated from Section 2 on Membership.*
- 4.3. Review existing committee structure with a goal of making significant improvements.
- 4.3.1. Hold committees accountable by carefully defining their missions and assigning projects from the strategic plan.
- 4.3.2. Ensure that committees have a means to know what other committees are doing to avoid duplication and to collaborate for improved product results.
- 4.3.3. Provide and fund for adequate staff support for committees.

- 4.3.4. Encourage the Organizational Affairs Committee to be pro-active in implementing the strategies herein with the committees' outcomes to be measured against the strategic plan.
- 4.4. Review the TRTA Policies and Bylaws with intent to sunset obsolete policies/bylaws and to write new policies/bylaws that will guide the association for the next ten years. *Organizational Affairs Committee to review, recommend, and complete re-write in 2008.*
- 4.5. Implement a financial audit committee to assist and oversee the independent annual audit.
- 4.5.1. Be certain that member dollars are spent effectively with an eye on frugality.
- 4.5.2. To remain financially viable and to project long-term needs, study and report on the feasibility of planned dues increases. *Referenced in Membership Goal #2.5.*
- 4.5.3. Review all member benefit programs to maximize revenue.
- 4.6. Provide resources to Local Units that encourage:
- 4.6.1. Recommend standardized local seminars on a seasonal calendar of programs and events.
- 4.6.2. Assist Local Units in their operating structure to protect TRTA, (e. g., federal ID number, appropriate checking signing policies, minimal insurance standards, etc.).
- 4.6.3. Help Local Units recruit and retain members by developing incentives or rebates for greatest membership growth and retention rates. .
- 4.7. Enhance the relationship and offer cooperation to the TRT Foundation in achieving mutual goals.
- 4.7.1. Maintain interest in the success of the Trinity Center and its relationship with TRTF and TRTA to ensure fiscal responsibility.
- 4.7.2. Raise funds to supplement school districts experiencing budget cuts as a means to position TRTA and to generate good will and favorable publicity. *Washington state association as a model.*

ⁱ CAE is a designation by the American Society of Association Executives indicating Certified Association Executive. Contact Information: Bob Harris, CAE, 850/570-6000; bob@rchcae.com; 335 Beard Street, Tallahassee, FL 32303 www.nonprofitcenter.com.