



# Louisiana Retired Teachers Association



## **Strategic Plan Louisiana Retired Teachers Association**

October 21, 2013  
Bossier City, Louisiana

### **Introduction**

The Louisiana Retired Teachers Association was founded in 1956 --- celebrating its 57th year of service to retired educators receiving benefits from the Teachers' Retirement System of Louisiana. It is a 501(c)(4) organization recognized by the IRS and the State of Louisiana.

The Executive Committee of the LRTA Executive Board met in Baton Rouge, LA on September 6, 2013 and considered revisions to the LRTA Strategic Plan. The following volunteer leaders and staff participated in recommending strategic plan revisions to guide LRTA for three to five years:

Lonnie E. Dunn, Ed.D., President; James A. Taylor, Sr., J.D., Ph.D., Immediate Past President; Maria Sly George, First Vice-President and State Membership Chair; Bertha H. Breland, Second Vice-President and State Program Chair; and, James T. Stewart, District VII President and District President Representative on the Executive Committee. Staff included Graig A. Luscombe, Executive Director and Renee M. Siccone.

It is their recommendation that the Executive Board adopt these plan revisions at the board meeting to be held Monday, October 21, 2013 that will be held in conjunction with the 2013 LRTA Fall Meeting. The new plan is designed to cover the five year period of 2013 through 2018.

## Strategic Planning

A strategic plan serves as a roadmap for an association. It provides direction, priorities and a framework for volunteer leaders and staff. It should guide the committees, board, districts and staff in fulfilling the mission in serving members' needs.

## Mission, Vision and Values

The Mission, Vision and Values Statements express the professional image of the Louisiana Retired Teachers Association.

The mission statement identifies the organization, who it serves and what it offers. It should complement the IRS statement of purpose.

### **The LRTA Mission Statement is:**

“The Louisiana Retired Teachers Association is the voice of the retired education community, representing its interests by monitoring, protecting and improving the benefits needed to secure dignity, independence and overall quality of life.”



The vision statement defines what the association aspires to accomplish in the long term.

### **The LRTA Vision Statement is:**

“The Louisiana Retired Teachers Association: striving to make retirement years great!”

The values statement represents the core principles guiding the board and staff:

### **The LRTA Values Statement is:**

The guiding principles for governing and managing LRTA are a code of ethics complemented by the following values:

- Service to members and the association.
- Integrity, honesty and transparency in our leadership.
- Respect for diversity of people and ideas.

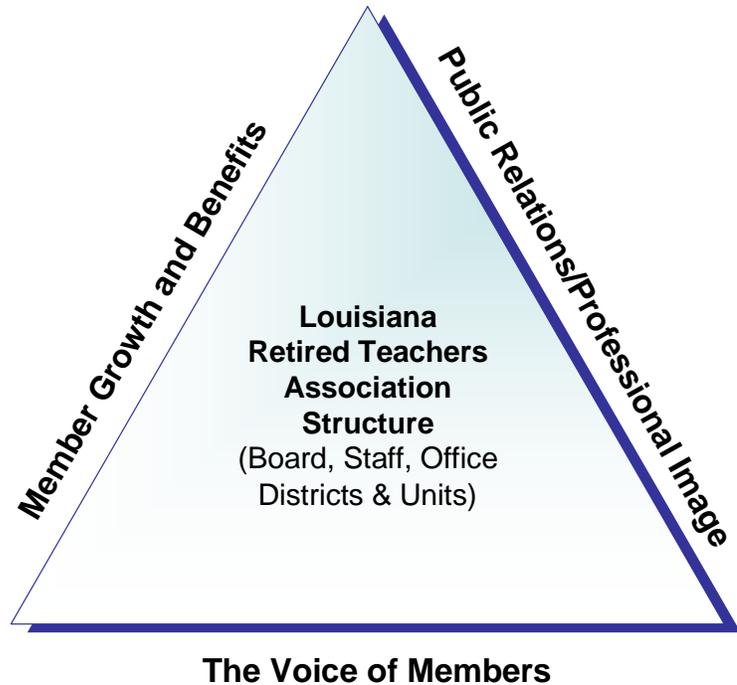


## Four Broad Goal Areas

Goals represent the broad areas in which the association must focus to fulfill its mission statement. By identifying the goals, the volunteer leaders and staff are fully aware of where the greatest expenditure of energy and resources should be directed.

Within each goal are strategy statements, indicating how some of the goals should be achieved.

Action steps identify timelines and accountability for getting the work done.



**The goals of LRTA allocated to four general categories. They are:**

- 1. Association Governance and Administration**
- 2. Membership Growth and Member Benefits**
- 3. The Voice of the Members—Government Affairs**
- 4. Public Awareness and Professional Image**

**The goals are as follows:**

**I) Association Governance and Administration** (*Efforts to be conducted by the LRTA Executive Committee*)

- A) Annually review the strategic plan to ensure that it is being accomplished and used as a guide for the incoming leadership.
  - (i) Executive Director and staff to use the strategic plan to create a staff business plan with performance measures that can be reviewed annually.
- B) Governing Documents and other publications should be directed toward providing service to members and the association; should display integrity, honesty and transparency in our leadership; and, should display our respect for diversity of people and ideas.
- C) The Foundation shall operate autonomous of the LRTA and shall have a cooperative relationship in carrying out its efforts.

**II) Membership Growth and Member Benefits** (*Efforts to be Conducted by the LRTA Membership Committee*)

- A) Recruit Associate Members at the state, District and Unit levels to enroll currently-working personnel.
- B) Develop an aggressive statewide membership campaign to enroll 50 percent or more of the potential members; effectively a goal of 25,000 in 5 years (2012). (*Campaign to be carried out by the Membership Committee*).
- C) Customize membership marketing and respective applications to target all retirees eligible for membership, i.e. paraprofessionals and school secretaries, college and university faculty, etc.
- D) Identify the “best-practices of membership recruitment” utilized at the Unit, District and State levels.
  - (i) Maintain the LRTA Resource Book for recruiting and retaining members for use by Membership Chairs and committees.
  - (ii) Plan an annual membership training programs to assist volunteers in recruitment and retention efforts.
- E) Survey members and prospective members to determine their needs and expectations from LRTA.
- F) Provide highly valued events and meetings for members.
  - (i) Offer guidelines to Districts, and Units, for planning meetings that are informative and interesting.
  - (ii) Continue Spring and Fall Meetings.
- G) Member Resources
  - (i) Explore affinity programs that offer more benefits for members.
  - (ii) Promote AMBA services to ensure the success of the program and the relationship with the company.

**III) The Voice of Members – Government Affairs** (*Efforts and positions to be carried out by the LRTA Legislative Committee*)

- A) Make critical choices by identifying the issues of greatest importance to members in which LRTA can effectively influence. (*Efforts and positions to be carried out by the Legislative Committee.*)
- (i) Seek legislation to fund an annual Permanent Benefit Increases of up to 3 percent.
  - (ii) Seek legislation to raise the minimum balance in the experience account from two to three Permanent Benefits Increases.
  - (iii) Establish legislation dedicating a portion of the surplus in the budget to address initial unfunded accrued liability of the retirement system.
  - (iv) Support continuation of the uniform policy for a percentage of funds to support retirees' health insurance premiums.
  - (v) Continue efforts to eliminate the GPO/WEP provisions of the Social Security Administration.
- B) Study feasibility for creating a Political Research Development Committee.
- C) Survey lawmakers annually to determine their positions on educator retirement issues; report results to members.
- D) Encourage Districts and Units to be aggressively active in grassroots politics at the local level.

**IV) Public Awareness and Professional Image** (*Efforts to be carried out by the Public Relations Committee*)

- A) Position LRTA as a respected professional association.
  - (i) Promote an attitude of professionalism at all levels in the association.
  - (ii) Implement a professional look through a branding campaign by consistent use of the new logo/image throughout the association.
  - (iii) Utilize the vision statement as the association mantra: “The Louisiana Retired Teachers Association: striving to make retirement years great!”
- B) Develop alliances to position LTRA as a leader and to build coalitions.
  - (i) Empower the Executive Director to be a leader in building alliances that benefit LRTA.
  - (ii) Identify the private and public organizations to which LRTA shares interests. (i.e. AARP, NRTA, TRSL, OGB, Retired Superintendents’ Association, etc.)
- C) Ensure that District leaders communicate the information from LRTA to the Districts and Units.
  - (i) Encourage communication to all Unit officers, not just the elected president; to ensure the information is received and utilized.
  - (ii) Encourage each District and Unit to maintain a working notebook for operations and key documents to pass on to successors (i.e. sample programs, announcements, rosters, best-practices, committees, etc.)
  - (iii) Ensure that volunteers are qualified to do the jobs necessary to advance the important work of LRTA.
- D) Adjust the Fall meeting to be geographically convenient for members.
- E) Enhance the bi-monthly newsletter with photographs, improved look, etc. and be sure all targeted prospective members receive the January issue.
- F) Reenergize the LRTA Public Relations Committee.

- G) Create a PR Resource Manual for use by state, District and Unit Public Relations Committee volunteers.
- (i) Make it the how-to manual for press releases, interviews, etc.
  - (ii) Include items such as the history of LRTA, economic impact of the education retirement community, etc.