



Strategic Plan Louisiana Retired Teachers Association

October 21, 2019
Baton Rouge, Louisiana

Introduction

The Louisiana Retired Teachers Association was founded in 1956 --- celebrating its 63rd 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 LRTA Executive Board met in Baton Rouge, LA on October 21, 2019_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:

Nancy Quigley, President, Bertha Breland, Immediate Past President, Janis Hernandez, First Vice President and State Membership Chair, Lazette Watterson, Second Vice President and State Program Chair, Theodore H. George, District I President, Jerilyn Williams, District II President, Alva J. Martin, District III President, Peggy Aime, District IV President, Celina G. Richard, District V President, Wilda P. Chelette, District VI President, Walter T. Rogers, District VII President, Genevieve Gordon, District VIII President, Freddy L. Rivers, District IX President, Becky S. Solley, District X President, Jerry E. Paige, District XI President, Dr. Jerry J. Baudin, TRSL Board of Trustees, Dr. James A. Taylor, TRSL Board of Trustees, Martha Hays, AARP Representative. Staff included Rodney Watson, Executive Director; Renee Siccone, Assistant Director; Jennifer Tran, Public Relations/Communications Coordinator; Ann Reed, Membership Services Coordinator.

The following are recommendations made by the Executive Board at a meeting held Monday, October 21, 2019 in conjunction with the 2019 LRTA Fall Meeting.

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~~ of 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:

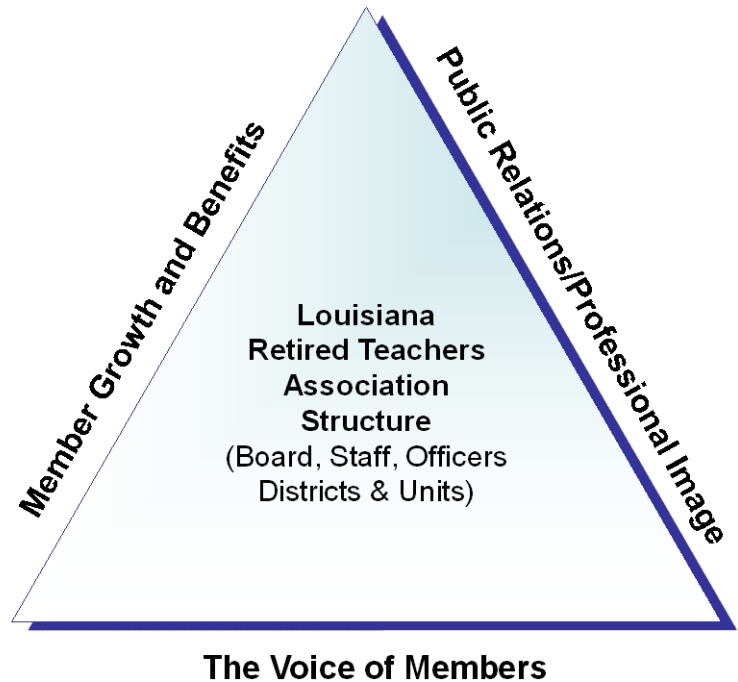
- Service to members and the association.
- Integrity, honesty and transparency in our leadership.
- Respect for diversity of people and ideas.

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 and reported to the Executive Board annually at the Spring Meeting.

- 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.

The LRTA office will review all governing documents every five years and make recommendations for amendments to the Board for membership consideration.

- C) The Foundation shall operate autonomous of the LRTA and shall have a cooperative relationship in carrying out its efforts.

The LRTA office and Foundation shall continue to work autonomously and maintain a cooperative relationship as it relates to areas of common interest.

II) Membership Growth and Member Benefits

- A) Recruit Associate Members at the State, District and Unit levels to enroll currently-working personnel.
- Continue annual appeals and encourage grassroots activities to recruit Associate Members with annual reporting through the State First Vice President and Membership Chair.
- B) Develop an aggressive statewide membership campaign and established the following goals:
- (i) To maintain the current net state membership factoring in non-renewals (i.e. opting out of membership/death of members, etc.) Current enrollment: 5,400 Active + 13,117 Auto Active + 1,446 Lifetime = 19,963 (as of Sep. 30, 2019)
 - (ii) Set a statewide membership goal of 5% accountable and reported at the District Level: 983 new members
- C) Customize membership marketing and respective applications to target all retirees eligible for membership.
- (i) Conduct membership workshops at State Meetings
 - (ii) Conduct biennial membership workshops, statewide
- D) Identify the “best-practices of membership recruitment” utilized at the Unit, District and State levels.
- (i) Update the LRTA Resource Book for recruiting and retaining members for use by Membership Chairs and committees and provide training as necessary for new officers at the Unit, District, and State levels.
- E) Provide annual reports on membership goals to the Executive Board to determine organizational 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. The State Executive Director will attend and provide information and training at District Meetings annually.

- (ii) Continue Spring and Fall Meetings. The focus of the Spring Meeting will be, primarily, to serve as a venue for LRTA state business. The Fall Meeting will also focus on political and social topics of interest to the LRTA membership.

G) Member Resources

- (i) Promote AMBA services to facilitate the success of the program and the relationship with the company with an organizational goal to increase membership within LRTA.

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 which LRTA can effectively influence. *(Efforts and positions to be carried out by the Legislative Committee.)*
 - (i) Seek legislation to fund Permanent Benefit Increases on a regular basis as funding is available.
 - (ii) Support legislation dedicating a portion of the surplus in the budget to address initial unfunded accrued liability of the retirement system.
 - (iii) Support continuation of the uniform policy for a percentage of funds to support retirees' health insurance premiums.
 - (iv) Continue efforts to eliminate the GPO/WEP provisions of the Social Security Administration.
- B) Survey lawmakers and candidates prior to state voting cycles to determine their positions on educator retirement issues; report results to members in order to make informed voting decisions.
- C) Encourage Districts and Units to be aggressively active in grassroots politics at the local level. The LRTA Executive Director will provide training and resources to Units and Districts.

IV) Public Awareness and Professional Image

- 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 LRTA as a leader and to build coalitions.
 - (i) Empower the Executive Director to be a leader in building alliances that benefit LRTA and continue membership in the Louisiana Public Schools Coalition.
 - (ii) Identify the private and public organizations ~~to~~ with 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, subject to availability of meeting space.

- E) Continue to enhance the-four annual newsletters with photographs, improved look, etc. and be sure all targeted prospective members receive the Winter issue.

- F) The LRTA Public Relations Coordinator will provide updates to the PR protocols within the state Resource Book and provide training to local Units and Districts as needed.
- G) Create a PR Resource section within the State Resource Book for use by State, Districts and Units.
 - (i) Make it a how-to for press releases, interviews, etc.
 - (ii) Include items such as the history of LRTA, economic impact of the education retirement community, etc.
- H) Use data from the LRTA website, Facebook page and other digital communication channels (i.e. Google Analytics, Facebook Analytics, etc.) to guide future public relations/communication strategies.
 - (i) The LRTA Public Relations Coordinator will provide an annual report based on this data at state meetings.
- I) Identify new or additional media channels to reach the LRTA target audience.
 - (i) Consider the age and demographic of retirees and LRTA members when choosing new media.
 - (ii) Incorporate new or additional media channels in public relations campaigns and the overall communication strategies.