



# Louisiana Retired Teachers Association

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

October 10-11, 2007  
Baton Rouge, Louisiana

### **Introduction**

The Louisiana Retired Teachers Association was founded in 1956 --- celebrating its 50th year of service to retirees in the Teachers' Retirement System of Louisiana in 2006. It is a 501(c)(4) organization recognized by the IRS and State of Louisiana.

The following volunteer leaders and staff developed the strategic plan to guide LRTA for three to five years:

Dr. Wade L. Ledet, President; Mrs. Bonnie V. Lyons, Immediate Past President; Dr. Hugh C. Craft, First Vice-President & State Membership Chair; Mrs. Ouida A. Mitchell, Second Vice-President & State Program Chair; Mrs. Velma M. Pryce, District I President; Mr. Elicio P. Nicholas, District II President; Mr. Rupert E. Breland, District III President; Mrs. Peggy B. Aime, District IV President; Mrs. Jerry Caillier, District V President; Mrs. Lizzie K. Syas, District VI President; Mr. James T. Stewart, District VII President; Mrs. Gloria B. Napier, District VIII President; Dr. Sidney A. Seegers, District X President; Mrs. Carol J. Lynch, District XI President; Mr. Benjamin L. Sandifer, State Legislative Chair; and Mr. Wayne Berry, State Public Relations Chair.

Staff included Graig A. Luscombe, Executive Director; Renee M. Siccone, Assistant Director; and Ann S. Greer, Membership Services Coordinator. Bob Harris, CAE, served as the planning facilitator<sup>1</sup>.

### **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

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committees, board, Districts and staff to fulfill the mission in serving members' needs.

## **Mission, Vision and Values**

The combination of the Mission, Vision and Values Statements express the professional image of LRTA.

The mission statement identifies the organization, who it serves and what it offers. It should complement the IRS statement of purpose. No mission had been approved or adopted by the board of directors.



### **Recommended by the Board:**

“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 is where the association aspires to be in the long term.

### **Recommended by the Board:**

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

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

### **Recommended by the Board:**

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

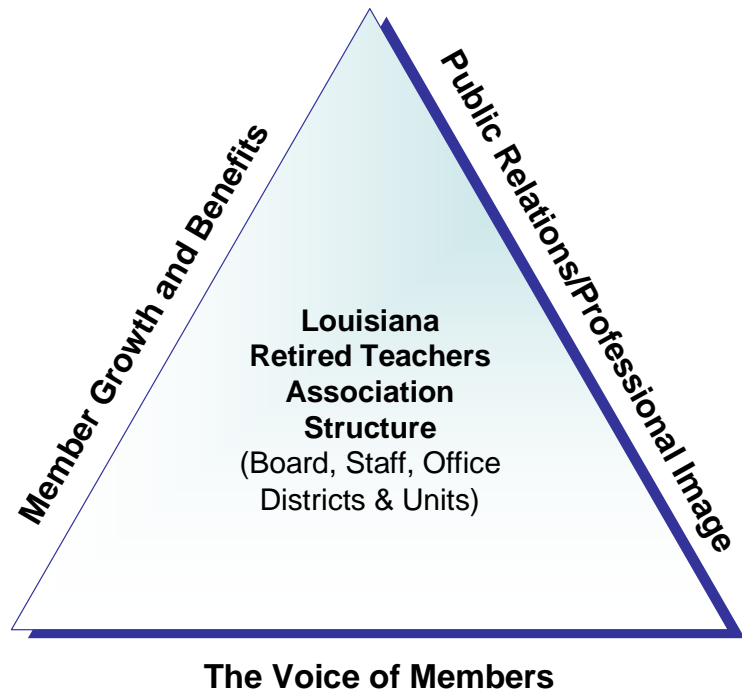
- Service to members and the association.
- Integrity, honesty and transparency in our leadership.
- Respect for diversity of people and ideas.

## Four Broad Goal Areas

Goals<sup>2</sup> 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.



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<sup>2</sup> Goals are sometimes identified as the organization's "core competencies."

**I) Association Governance and Administration** (*Efforts to be carried out by Executive and Budget Committees, and staff.*)

A) Budgeting

- 1) Develop a written policy or process whereby the Budget Committee has input after the staff drafts a proposal and prior to Executive Committee approval.

B) Staffing and Office

- 1) Ensure that staffing is commensurate with the goals of the strategic plan.
  - (i) With the consultation of the Executive Director and Executive Committee, add a staff member for membership recruitment and service to take effect in the 2008 – 09 fiscal year.
  - (ii) Expand office space as needed after considering the return on investment compared to lost revenue.

C) Train the LRTA volunteer leaders.

- 1) Appoint a Leadership Development Task Force (by Dec. 2007), with a report and implementation in 2008.
- 2) Formalize an annual board training program to educate state, District, and Unit level leaders to their roles and responsibilities and the importance of alignment with and support of the new mission, vision, values, goals and strategies.
- 3) 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.
- 4) Study the benefit of amending the bylaws to identify the successor to the elected president by replacing First Vice President with a Vice President or President-Elect; (at the end of three election cycles using the current leadership ladder of 1<sup>st</sup> and 2<sup>nd</sup> Vice President.)

## D) Governing Documents

### 1) Develop and approve a Board of Directors Manual (Fall 2007), including:

- (i) Communications Protocol
- (ii) Code of Ethics
- (iii) Diversity Statement

(a) Adopt the values statement of “Respect for Diversity of People and Ideas” by making sure the principle is implemented throughout LRTA. Appoint a Task Force for this purpose to study and promote the principle.

(i) Consider adopting a guideline for the nominating committee to ensure diversity.

(ii) Consider designating a board seat(s) for a paraprofessional or person from an under-represented segment of the membership.

(iii) Promote diversity on the website, in the newsletter and at other opportunities and on all levels in the association.

### 2) Develop the Board Policies and Employee Handbook (Fall 2007.)

### 3) Review the following documents to determine the purpose of having all three rather than two: Constitution, Bylaws, and Articles of Incorporation. (Staff and Executive Committee to undertake with legal counsel by Fall 2008.)

E) 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

- A) Make Life Memberships available.
- B) Recruit Associate Members at the state, District and Unit levels to enroll currently-working personnel.
- C) 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*).
  - 1) Reward members who recruit 25, 50 and 100 new members during a year.
  - 2) Increase the budgeted District dues from \$1 a year to \$1.50 effective in fiscal year 2008-09.
  - 3) Customize membership marketing and respective applications to target all retirees eligible for membership, i.e. paraprofessionals and school secretaries, college and university faculty, etc.
  - 4) Identify the “best-practices of membership recruitment” utilized at the Unit, District and State levels.
    - (i) Create a handbook for recruiting and retaining members for use by Membership Chairs and committees.
    - (ii) Plan an annual Membership Training Summit to assist volunteers in recruitment and retention efforts.
- D) Survey members to determine their needs and satisfaction in LRTA. (Consider similar survey of prospective members.)
- E) Provide highly valued events and meetings for members.
  - 1) Offer guidelines to Districts, and Units, for planning meetings that are informative and interesting.
  - 2) Continue the Spring and Fall meetings.

F) Member Resources

- 1) Create a section on the website to identify new resources for members that will save them money on health care and other needs.
  - (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

- 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.*)
  - 1) Seek legislation to fund an annual cost-of-living adjustment of up to 3 percent.
  - 2) Seek legislation to raise the minimum balance in the experience account from two to three COLAs.
  - 3) Establish legislation dedicating a portion of the surplus in the budget to address initial unfunded accrued liability of the retirement system.
  - 4) Ask Legislature to develop uniform policy for a percentage of funds to support retirees' health insurance premiums.
  - 5) 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 active in grassroots politics at the local level.
- E) Request Legislative Committee to study creation of an annual "Day at the Capitol;" consider collaboration with AARP; report to the board and implement in Spring 2008.

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

A) Position LRTA as a respected professional association.

- 1) Promote an attitude of professionalism at all levels in the association.
- 2) Implement a professional look through a branding campaign by consistent use of the new logo/image throughout the association.
- 3) Utilize the new 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.

- 1) Empower the Executive Director to be a leader in building alliances that benefit LRTA.
- 2) Identify the private and public organizations to which LRTA shares interests. (i.e. AARP, NRTA, TRSL, OGB, Retired Superintendents’ Association, etc.)

C) Clarify the purpose and operation of the Teachers’ Retirement System of Louisiana to be fully understood by members, lawmakers, media and the public.

- 1) Create fact sheets for newsletter and website.
- 2) Create a document, “Debunking the Myths about the Retirement System.” Collaborate with TRSL in creating the document. Have completed for distribution to the Legislature in 2008.
  - (i) Post the information on website, in newsletter, available to Districts, Units, etc.
  - (ii) Provide pertinent information to all legislators about LRTA and TRSL.

- D) Ensure that District leaders communicate the information from LRTA to the District and Units.
  - 1) Encourage communication to all Unit officers, not just the elected president; to ensure the information is received and utilized.
  - 2) 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.)
  - 3) Ensure that volunteers are qualified to do the jobs necessary to advance the important work of LRTA.
    - (i) Move the Spring meeting to Baton Rouge to take advantage of a presence at the Legislative Session.
    - (ii) 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) Create a PR Resource Manual for use by state, District and Unit Public Relations Committee volunteers.
  - 1) Make it the how-to manual for press releases, interviews, etc.
  - 2) Include items such as Debunking the Myths, history of LRTA, economic impact of the education retirement community, etc.
- G) Create a Public Relations network or phone-tree (similar to the government affairs alert-tree.) Use the PR Tree to communicate PR blasts throughout the association as issues and opportunities arise.