



Louisiana Retired Teachers Association

Strategic Plan Goals, Initiatives, and Action Steps

2008, 2009, and 2010

Quarterly Update

October 1, 2008

Mission Statement:

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.

Vision Statement:

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

Values Statement:

The guiding principles for governing and managing the Louisiana Retired Teachers Association 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.

Strategic Plan Goals and Initiatives:

Goal 1. Association Governance and Administration

Initiatives: Budgeting
Staffing and Office Resources
Leadership Training
Governing Documents
LRTA Foundation

14 Action Steps
9 have been completed
2 are in process
3 require action

Goal 2. Membership Growth and Member Benefits

Initiatives: Reinstitute Life Memberships
Recruit Associate Members
Develop Statewide Membership Campaign
Survey Member Needs and Satisfaction
Provide Meetings and Events
Develop Member Resources

14 Action Steps
6 have been completed
6 are in process
2 require action

Goal 3. Voice of the Members—Government Affairs

Initiatives: Develop Legislative Priorities
Study Feasibility for Creating a Political/Research Committee
Conduct Annual Survey of the Legislature
Promote “Grassroots” Efforts at the District and Unit Level
Study Feasibility of Organizing “LRTA Day” at the Capitol

9 Action Steps
3 have been completed
4 are in process
2 require action

Goal 4. Public Awareness and Professional Image

Initiatives: Position LRTA as a Respected, Professional Association
Develop Alliances and Build Coalitions
Better Explain TRSL Operations
Promote Efficient and Effective Communications Channels
Enhance Publications
Create a Public Relations Resource Manual
Create a Public Relations Network

17 Action Steps
9 have been completed
4 are in process
4 require action

ASSOCIATION GOVERNANCE AND ADMINISTRATION

GOAL	STRATEGY	2007-2008	2008-2009	2009-2010
Budgeting	Develop a written policy or process whereby the Budget Committee has input after the staff drafts a proposed budget, and prior to Executive Committee approval.	Policy approved at Fall Meeting 10/22/07	Done	Done
Staffing	Ensure staffing is commensurate with strategic plan goals.	In process	In process	In process
Train LRTA Volunteer Leaders	Appoint a leadership development task force.			
	Formalize an annual board training program to educate state, district and unit level leaders to their roles and responsibilities, and to the importance of alignment with, and support of, the new mission, vision, values, goals and strategies.		First training session to be conducted Nov. 13, 2008	Fall 2009
	Annually review the strategic plan to ensure that it is being used as a guide for association leaders and staff.	Reviewed at Spring Meeting 4/22/2008	Reviewed at Fall Meeting 10/20/2008	
	Study the benefits of amending the bylaws to identify successors of officers (at the end of three election cycles using the current leadership ladder of 1 st and 2 nd vice president).		Fall Meeting 2009	
Governing Documents	Develop and approve a Board of Directors Manual including: Communications Protocol, Code of Ethics and Diversity Statement	Manual approved at Fall Meeting 10/22/07	Done	Done
	Appoint a task force to study and promote the values statement.			
	Consider adopting a guideline for the Nominating Committee to ensure diversity among LRTA officers.	In Process/ Spring and Fall 2008		
	Consider designating a board seat(s) for a paraprofessional or person from and under-represented segment of the membership.			

MEMBERSHIP GROWTH AND MEMBER BENEFITS

GOAL	STRATEGY	2007-2008	2008-2009	2009-2010
Provide Life Membership Option	Make life memberships available.	On ballot January, 2008. Passed.	Offered	Offered
Recruit Associate Members	Aggressively recruit currently working personnel as associate members.	Associate Member Recruitment Program underway in local areas.	In process	In process
Enroll 50% or More Members	Develop an aggressive statewide membership campaign.			Through 2012
	Reward members who recruit 25, 50, 100 new members during the year.	Approved at Fall Meeting 10/22/07	Done	Done
	Increase the budgeted district dues from \$1.00 to \$1.50 per member.	Approved at Fall Meeting 10/22/07	Done	Done
	Customize membership marketing and respective applications to target all retirees eligible for membership, i.e., paraprofessionals, school secretaries, college and university faculty, etc.	Done	Done	Done
Identify "best practices" for membership recruitment to be used on state, district and unit levels.	Create a handbook for recruiting and retaining members for use by Membership Committee.			
	Plan an annual Membership Training Summit to assist volunteers in membership recruitment and retention efforts.		Offered at Fall Meeting 10/20/2008	
Survey Members	Survey members and prospective members to determine their satisfaction with and expectations from LRTA.	Satisfaction survey conducted 12/07		

VOICE OF THE MEMBERS – GOVERNMENT AFFAIRS

GOAL	STRATEGY	2007-2008	2008-2009	2009-2010
Identify Issues	Seek legislation to fund an annual COLA up to 3%		HSR 14	
	Seek legislation to raise the minimum balance in the Employee Experience Account from two to three COLAs.	HB 90 SB 35	In Process	
	Establish a mechanism to dedicate a portion of budget surpluses to address paying down the IUAL.	In Process	In Process	
	Promote specified percentage of support for retiree health insurance premiums.			
	Continue efforts to eliminate GPO/WEP.	In Process	In Process	
Political Research Development Committee	Study the feasibility of creating a Political Research Development Committee.			
Survey Legislators	Survey lawmakers each year to determine their positions on retirement issues.	Completed October, 2007	Done	
Grassroots Organization	Encourage districts and units to be active in contacting legislators in their districts.	Legislative Contact Lists	Done	
“Day at the Capitol”	Request Legislative Committee to study the feasibility of creating a “Day at the Capitol”.	Report to Executive Board at Spring Meeting April, 2008.	In Process	

PUBLIC AWARENESS AND PROFESSIONAL IMAGE

GOAL	STRATEGY	2007-2008	2008-2009	2009-2010
Position LRTA as a Respected Professional Association.	Promote an attitude of professionalism at all levels of the association.	Done	Done	In Process
	Implement a professional code through a branding campaign concentrating on consistent use of logo/image throughout the association.	Done	Done	In Process
	Utilize the new vision statement as the association "mantra".	Done	Done	In Process
Develop Alliances/Build Coalitions	Empower Executive Director to be a leader in building alliances that benefit LRTA.	Done	Done	In Process
	Identify public and private organizations with which LRTA shares interests.	AARP/NRTA La. School Board Assoc. LAPERS NCTR LSAE	Done	
Classify Purpose and Operation of TRSL	Create fact sheet for newsletter and website.			
Create Document Explaining Retirement System	Develop a document that explains important facets of TRSL for distribution: Post on website Publish in Newsletter Make available to districts and units	To be reviewed by Legislative Committee January 2008 Mailed April 2, 2008.		
Provide Information about LRTA and TRSL	Keep legislators informed on all issues	In Process	In Process	In Process
Develop Channels of Communication	Encourage communication from LRTA through districts to all units.	In Process	In Process	

	Encourage district and unit officers to maintain a working notebook to catalogue information to be passed on to successors.			
	Ensure that volunteers are qualified to do jobs necessary to advance the work of LRTA.		Leadership Training scheduled for Nov. 13, 2008	
Spring and Fall Meetings	Move the Spring Meeting to Baton Rouge			
	Provide Fall Meeting locations that are geographically convenient for members.	Done	Done	In Process
Newsletter	Enhance the bi-monthly newsletter with an improved look, including the use of photographs.	Done	Done	In Process
	Ensure all targeted prospective members receive the January issue each year.	Done	Done	In Process
PR Resource Manual	Create a PR Resource Manual for use by state, district and unit Public Relations Committee Chairs.	In Process by the Public Relations Committee	In Process	In Process
PR Network	Create a public relations network (Phone-tree) to communicate throughout the association issues and opportunities as they arise.	In Process by the Public Relations Committee	In Process	In Process