

RETIRED EDUCATORS ASSOCIATIONS

Leadership & Volunteer
Engagement
Resource Manual



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**Please note this manual is provided for informational purposes only and should not be construed as legal advice.*

Introduction: How to Use this Guide

This leadership and volunteer engagement guide has been developed to support Retired Educator Association (REA) leaders and volunteers across the country. You'll find essential resources here to help you as a volunteer leader in your local unit or chapter or as a volunteer on the state level. The guide includes resources to help retired educators engage and retain volunteers to support the mission and grow the community to include the next generations of educators approaching retirement.

Here's how information is arranged

- ✓ **Unit structure and organization:** Everything you need to know about running a unit.
- ✓ **Engaging younger members:** Ideas for finding new volunteers and recruiting new members.
- ✓ **Grow membership with fresh programming:** Spark creative thinking among your volunteer leadership team with these strategies and programs.
- ✓ **Advocacy:** All the tools you need to mobilize members on critical legislative issues.
- ✓ **Communications and social media:** Useful tips for crafting materials and conversations.
- ✓ **Leadership training:** Tips for being the best leader and communicator you can be.
- ✓ **Additional AARP resources:** A list of retired educator associations across the country and links to their websites, and a list of AARP state offices and their contact information.

About NRTA: AARP's Educator Community (NRTA)

NRTA is America's largest national organization representing the interests of educators 50+. With a national network of nearly one million retired educators and school personnel, NRTA provides strategic state-based collaborators for AARP's advocacy, community outreach and education initiatives. This expansive network has a long history of supporting State Retired Educator Associations and their local units. NRTA, a part of AARP's Office of Community Engagement, includes 49 affiliated state and city associations, more than 2,400 local associations, and a national office in Washington, DC.

How we Started

Dr. Ethel Percy Andrus founded the National Retired Teachers Association in 1947. As the former principal of Abraham Lincoln High School in East Los Angeles, California, she was shocked to learn many retired educators had inadequate pensions and no health insurance, forcing them to live in poverty. Dr. Andrus discovered this reality one day when she visited a retired teacher and found her living in a chicken coop because of a lack of retirement resources. Recognizing the disparity before her, she leveraged her social capital as a former principal in the community and got to work. Dr. Andrus took action by protecting the pension benefits of retired educators and worked with health insurance companies to provide them with a much-needed health care benefit. But she didn't stop there. Eleven years later, in 1958, Dr. Andrus expanded her reach by founding AARP (originally founded as the American Association of Retired Persons) to fight for the economic and social well-being of Americans 50+.

NTRA's Mission

Taking our lead from Dr. Andrus, NTRA works through our network of active school personnel and retired educators to protect their financial security while fostering collaboration and volunteerism.

Collaboration with state associations and AARP

NTRA supports collaboration between the state and local Retired Educators Associations (REAs) and AARP on crucial issues, including:

- Caregiving
- Food security
- Safe driving
- Fraud prevention
- Healthcare
- Legislative advocacy
- Medicare
- Retirement security (including pensions)
- Social Security
- Technology training for older adults

Unit Structure and Organization

Elected board officers

President

Vice President

Treasurer

Secretary

President

The president is a leader who gets things done and inspires others to join the mission and execute unit activities.

Unit officers

The unit officer positions described below are common to most units. A best practice among retired educator associations is to choose co-positions, inviting two individuals to fill one role and split the responsibilities and time commitment.

Presiding officer

At unit meetings, the unit president should be sensitive to feelings and opinions expressed during discussions. Generally, the president's role is to help unit members make the best possible decisions in a given situation. For effective meetings, the president should:

- Plan and follow an agenda.
- Begin and end the session on time.
- Be sure to hold a thorough discussion and call for a vote after a motion is made and seconded.
- Keep the meeting moving.
- Provide opportunities for member participation.
- Arrange for guest speakers.
- Introduce the person(s) responsible for particular parts of the agenda when appropriate.
- Model inclusive & empowering leadership.

Robert's Rules of Order, or other similar rules systems, can help unit leaders conduct meetings in an orderly, fair, and effective manner, and should be adopted. Information can be found at www.robertsrules.org.

Appointer

It is usually the responsibility of the unit president to appoint, with the approval of the executive committee, chairpersons of standing and special committees. Whomever the appointing officer is should consider such things as:

- Has the member expressed an interest in this activity?
- Does the member have the talents or skills needed?

Unit Structure and Organization

- Is the member familiar with the position description?
- Is an experienced leader required for the job, or can a new member be involved?
- Does the member help to promote diversity & inclusion in our unit?

Ex officio member of all committees

As an ex officio member of a committee:

1. The president acts as an advisor and resource to the committee.
2. The president recognizes that the responsibility for the effective functioning of the committee belongs to the committee chairperson.
3. When the president attends committee meetings, the president is careful not to dominate the discussion.

Liaison to the state Retired Educator Association

The unit president acts as a promoter of state REA goals and objectives. He or she works closely with other officers and committee chairpersons to fulfill this responsibility.

Communicator

The unit president receives information from the state REA office and state presidents, as well as other organizations, including AARP. The unit president communicates this information to unit members in as timely a manner as possible. At times, the unit president will be asked to provide information about the unit. A communications liaison can also be appointed who manages the communications to members, including email newsletter distribution and management of the website and social media channels.

A spokesperson for the unit

The unit president is expected to speak for the unit before leaders in the community. The president and board of directors should clearly understand priorities, specific activities of the unit, and clear, concise message points to communicate effectively to stakeholder audiences.

Inspire and lead the unit

A few suggestions on ways to inspire and lead the unit include:

1. Be well organized, knowledgeable, and committed to the organization's goals.
2. Be enthusiastic and genuinely concerned about individual members, and constantly think of including diverse voices in the unit.

Unit Structure and Organization

3. Learn to delegate well and encourage others to get involved. It is important to identify and utilize member abilities, including recognizing the individual member's potential and be aware of training resources available to help develop their leadership skills. Check with the state REA office, the AARP state office, and the NRTA team to identify resources.

Vice president

The function of the vice president is loosely defined. Generally, the vice president works with the president and substitutes for the president when necessary. In addition, the vice president may be assigned specific duties by the executive committee. The vice president ordinarily is appointed the job of program chairperson. Many units have a system of automatic succession to the unit presidency to ensure continuity. In some units, the automatic sequence is from vice president to president; there is a president-elect in others.

Treasurer

This position requires skills of organization and basic bookkeeping. The primary responsibilities of the unit treasurer are to:

1. Collect and record the receipt of dues.
2. Record any other money received.
3. Pay all bills provided for in the budget or confirmed by the president.
4. Keep accurate records.
5. Make a financial report at the annual meeting and at such other times as requested by the executive committee or board of directors.
6. Serve on the budget committee.

Secretary

The responsibilities of the secretary fall into two categories:

1. Record-keeping
2. Correspondence

Record keeper

The secretary acts as the unit's record keeper:

1. The secretary records and keeps a permanent file of the minutes of meetings, including unit meetings, board meetings, and executive committee meetings.
2. The secretary has available for reference, at all meetings, a copy of the unit bylaws and a roster of officers and committees.
3. The secretary keeps on file all incoming communications and documents of all outgoing correspondence.

Unit Structure and Organization

Correspondence

Maintaining the unit's correspondence is an important responsibility for the secretary:

1. The secretary takes charge of all correspondence delegated by the president or board of directors.
2. The secretary sends out timely meeting notices.
3. The secretary sends copies of relevant correspondence to appropriate state REA officers and other organizations, such as the AARP state office, with which the unit cooperates. This will sometimes include staff in the state, area, and national offices, depending on the unit board's content and wishes.
4. The secretary sends a list of current unit officers and committee chairpersons to the state REA office or designated officer; this is done at least annually or whenever changes occur.
5. The secretary keeps on file all incoming and outgoing correspondence.

Committees

Unit committees play a vital role in moving the work of the organization forward. Committees are a means for members to serve the community, execute events and programs, develop friendships and provide visibility for the mission.

Every unit should have a nominating committee. Units have the option of establishing a number of standing committees, including: membership, public relations, legislative program, and community service. Other committees may be established as determined by the president of the board of directors, or the board acting together.

The unit president (or the committee itself) appoints chairpersons for the standing committees, except for the nominating committee. The nominating committee chairperson is elected by the full unit membership, or by the nominating committee members or by board approval, as determined by the unit.

Committees can be standing (functioning throughout the year) and special or ad hoc (working as needed or serving a new or unique function). They should have a minimum of three members, who need not be unit officers or board members.

Committee officers (the chairperson or co-chairperson, for example) shall hold office for one year. Each officer shall hold office until a successor is elected and has been qualified.

Unit Structure and Organization

General responsibilities for committee chairpersons

Among the responsibilities of the committee chairpersons are to:

- Organize the committee's work and develop with the committee goals and a plan for the year.
- Establish a committee meeting schedule and hold regular meetings.
- Preside at committee meetings and coordinate tasks and programs.
- Report to the entire unit from time to time, either through newsletters or presentations at conferences.
- Share the committee plans and project reports with the president and board of directors to consider and approve.
- Collaborate with other committee chairpersons.
- Identify and develop future leaders for the committee and the unit.
- Communicate with the state REA to coordinate state and local committee goals and attend state REA-sponsored workshops as designated.

➔ A look at the past:

1. Do you know who founded your unit?

2. What's changed in your community since then?

Committee descriptions

Program committee

This committee develops a program plan for the year based on the goals and purposes of the unit, the interest of the members, and the types of programs that might attract new members.

Public relations committee

This committee informs the community and other stakeholders about the unit's activities through announcements, press releases, social media, and other communications.

Membership committee

This committee develops a plan for increasing unit membership and ensures all unit activities align and support the goal.

Unit Structure and Organization

Retirement planning committee

This committee, also known as the pre-retirement planning committee, works to present vital retirement information to active educators, unit members, and local community members.

Community services committee

This committee works to involve unit members and provide needed services in the community.

Legislative committee

This committee works to keep the membership informed about and active in advocating for legislation necessary for retired educators. It may also adopt other priorities as directed by the state REA.

Nominating committee

This committee prepares and presents to the membership a slate of at least one nominee for each office to be filled while also working hard to ensure the diversity of individuals and perspectives among officeholders, which will enhance the effectiveness and composition of the unit. A best practice among REA nominating committees is encouraging each committee member to recruit at least one volunteer for consideration.

Strategic planning for the unit

What is a strategic plan?

A strategic plan is a document that defines the organization's goals and outlines priorities, events, programs, communications, and activities for a specified time. By developing a strategic plan, leaders set direction, establish agreement on responsibilities and desired outcomes, allocate resources, and ultimately align group energy and actions towards a joint mission.

Set **S.M.A.R.T.I.E.** goals:

Specific

An example might be: "Our unit goal is to increase membership by 10% or 300 members by 12/31."

Measurable

Define your goal in a way that you can measure success. How will you know you achieved the goal and what does success look like?

Attainable

Is your goal within reach and do you have the resources to achieve it?

Unit Structure and Organization

Realistic

You want a stretch goal, but don't make it impossible. Choose a goal that sets the organization up for success.

Time-Bound

State what the organization wants to achieve and by when. Set an exact date or deadline.

Inclusive

It brings traditionally marginalized people -- particularly those most impacted by systemic disparities -- into processes, activities, and decision/policy-making in a way that shares power.

Equitable

It includes an element of fairness that seeks to address systemic injustice, inequity, or oppression.

Step one: identify 3-5 priority goals

- What do you and your volunteer leaders want to accomplish?
- How do you want to improve the lives of retired educators?
- By what percentage or number do you want to increase membership?
- Who will be designated to be responsible for keeping the unit accountable to goals identified?

Step two: assess the current situation, ask yourselves

- Where are we today and where do we want to be in six months or a year?
- What are our strengths and opportunities? How do we leverage them?
- What are our weaknesses and threats? How do we address them?

Step three: write the strategic plan

- How do we go from where we are now to where we want to be?
- Address critical performance issues (what resources do we need?).
- Is there something we can do better or differently because technology or our audiences have changed?
- Cover a significant time period (12 months, 18 months); include a calendar or timeline.
- Allocate resources for activities and include a budget.
- Allow flexibility.
- Establish milestones or markers throughout the year to benchmark progress and define what success looks like.
- Schedule regular check-ups for accountability and to measure success.

Unit Structure and Organization

Sample strategic plan

Goals

- Increase unit membership by 5-10% in 12 months while considering how to include others not currently in membership, and reaching out to those not usually engaged through a lens of inclusivity and equity.
- Attract and engage new volunteers with diverse backgrounds, skills, and interests.
- Maintain and grow a positive image in the community/region.

Strategies to reach the goals

What do you and your volunteer leaders want to accomplish?

- How do you want to improve the lives of retired educators?
- By what percentage or number do you want to increase membership?
- Who will be designated to be responsible for keeping the unit accountable to goals identified?
- Strengthen relationships with local school faculty, educational foundations, superintendents, administrators, etc.
- Serve as a resource for information on retirement; provide guidance and information; conduct seminars; and serve as mentors for new teachers.
- Choose from activities such as adopt a classroom, volunteering, and raising funds for school supplies.
- Strengthen relationships with district schools' associations, school board associations, and other state-wide associations.



1. Which organizations reflect the demographics of your unit/community?
2. Research groups that represent specific ethnic, racial, religious, and sexual orientation makeup in your community.

Look it up

Resources:

Predominant Language: A Colorful Map:

<https://tinyurl.com/predominantlanguagesmap>

2016 American Community Survey Languages Spoken at Home:

<https://tinyurl.com/languagespokenathome>



Collaborate with other groups and third-party allies to raise visibility as a volunteer partner and resource for information on retirement issues.

Unit Structure and Organization

Reach younger retirees, increase visibility, better tell the REA's story

- Reflect & refresh communications, how we talk about our value and what we do for retirees and the community.
- Use or build from the theme of vitality by stressing “we’re vital and active,” “we’re young at heart,” and we “demonstrate our youthful energy.”
- Refresh our ideas for events and outreach: field trips, speakers of interest, trivia games.
- Share best practices, such as a benefits seminar.
- Better communicate the value of all of our benefits.
- Find ways to reach educators who are about to retire or have retired in the last five years.
- Look for collaborations with schools, credit unions, other teachers’ groups, etc.; find ways to collaborate, and get retirement information out.

Retention: Strive for zero relapses

- Reflect & refresh: Take a look at how we run meetings and identify opportunities to refresh agendas, content, delivery, location, etc.
- Acknowledge superstars and members contributing to the community; highlight their efforts in the newsletter and on website(s).
- Better communication between units.

Increase social media presence

- Every unit should actively maintain a Facebook page.
- The REA should provide members with resources and Facebook training at conventions or workshops.
- Share information on volunteer activity in the community, legislative news, benefits of belonging, etc.
- Connect to other unit pages in the state to share information.
- Have an outreach tracker that has a list of contact information that can be shared with other units.
- Units should hold at least one legislative meeting a year to inform members and create a call to action (as needed).
- Share our excellent work in the community with legislators; contact NRTA to obtain a printed REA oversized check to present to elected officials, sharing the value of services we provide to the community through our volunteer efforts.
- Improve communication between units and their legislative chairs; share news, ideas, resources, and best practices.

Unit Structure and Organization

REA & board of directors action items

- Collect best practices from each district, including activities, ideas, or messages that are working.
- Recruit new members; reaching younger retirees, and build relationships with schools.
- Engage volunteers and keep them coming back.
- Serve current members and keep retention high.
- Mobilize members in our advocacy efforts; meet and strengthen relationships with the state legislature and local elected officials.
- Compile these best practices & share them at the convention.
- Create a vehicle/method to do this every year.
- Keep each other accountable.

Effective unit meetings

An effective unit meeting is well-paced, stimulating, and begins and ends on time. The leaders are clear about the purpose of the meeting, such as:

- To receive direction and cooperation from members in establishing policies and implementing plans or programs.
- To involve members in unit projects and activities.
- To keep members advised of progress on unit projects and activities.
- To promote fellowship.
- Educational or informational purposes, delivering pertinent news to retirees.

Arrangements for meetings

Place/location

Locate the regular meeting place near a geographic center for your members, access to public transportation if possible, and have ample parking. Choose a facility with good acoustics and available microphones, especially if you have a large room. Check a potential facility for ease of access to the room. Also, check the adequacy of the heating, air conditioning, and ventilation. Consider finding meeting space at local community centers, religious institutions, or in private rooms at eating establishments.

Welcome

Having volunteers available to greet members is a great way to welcome guests, share the agenda, increase sign-up for future events, and direct them to the location and answer questions.

Unit Structure and Organization

Calendar

The best time for meetings will vary from unit to unit. Survey the membership for meeting time preference, and evaluate or change from time to time.

Length

Unit meetings are generally about 60 to 75 minutes long. They probably should not exceed two hours in length. An annual event (picnic, luncheon, etc.) might be a logical exception. Keeping to a time limit can be a challenge. Some ideas to help you stick to a time limit include:

- Avoid lengthy introductions of speakers; present only enough information to establish credibility.
- Brief invited speakers before the event on the time constraints, the focus of their talk, and how they can craft their conversation to meet the needs of retired educators.
- Set time frames for each agenda item and do not create an agenda that is too long for one meeting.
- Do not let the committee reports run over time. Consider having each committee submit their reports ahead of time for participants' review and allocating in-person meeting time for next steps, decision-making, or deeper discussion.
- Define the length of time for commenting and offering opinions; be mindful, so the discussion doesn't get derailed.
- Ask your state REA for training at the regional workshops for ways to keep meetings brief, fun, and energized.

Frequency

The number of meetings per year will depend on local preferences. There should be enough to maintain interest; most successful units are consistent with their meeting times every year. You may also consider virtual sessions (conference calls or video calls) once or twice a year to deliver time-sensitive updates, such as legislative activity or breaking news.

Refreshments

Think about serving refreshments to welcome the group and foster camaraderie.

Unit Structure and Organization

→ GLOSSARY

Accessibility

From the American Alliance of Museums: “Giving equitable access to everyone along the continuum of human ability and experience. Accessibility encompasses the broader meanings of compliance and refers to how organizations make space for the characteristics that each person brings.”

Sample meeting agenda

1. Call to order.
2. Invocation.
3. Welcome/introductions.
4. Approval of last meeting’s minutes (with corrections and/or additions).
5. Treasurer’s report.
6. Committee reports (note: Committee reports should be 3-5 minutes long. Every committee does not have to report. The president should check with each committee chairperson before the meeting to see which committees need to provide a report.)
7. Unfinished business.
8. New business.
9. Program (note: Be sure to assign a time limit for the program. Program participants need to know. For a speaker, 20 minutes with questions and ten minutes for answers are adequate. Entertainment or educational programs should not be longer than 45 minutes.)
10. Announcements.
11. Adjourn.

Facilitate stimulating meetings

Involvement:

Have unit members get involved in the advanced planning of the meeting itself.

Variety:

Consider a variety of presentation formats as well as subjects and presenters. Consider presentations, panel discussions, question-and-answer, small group discussions and guest speakers.

Quality:

Every effort should be made to get the best presenters for each program. Careful planning goes into assuring that topics presented are worthwhile and of interest to the members.

Unit Structure and Organization

Fun:

Allow time for fun and for members to engage with one another at each meeting. Alternate entertainment programming with participatory activities so that attendees get a chance to socialize informally.



Find more suggestions and creative ways to make your meetings and events more engaging on page 40. Use the STAR framework (Setting, Tone, Action, and Roles) to engage younger members and new retirees.

Officer installation ceremonies

Most units hold installation ceremonies for newly elected unit officers. This gives recognition to those who have agreed to serve and highlights their roles. It also provides the unit membership with a chance to meet their new leaders. A reception following the installation provides an opportunity for unit members to become better acquainted with each other.

Sample installation ceremony for new unit officer

To members:

It is my privilege to install the newly elected officers of _____ retired educators association. They will now accept the privileges and responsibilities of these offices.

Officers-elect, please come forward, taking your place, president on my right and others on my left. An installation is an honorable occasion, solemn with acceptance of paramount duties to be shouldered, but also a happy event—bright with anticipation of work to be done, challenges to be addressed together, friendships to be strengthened, and of the joy of working with and serving others.

In carrying out your duties as an officer, you carry the torch which was lit and carried so nobly by the founder of the National Retired Teachers Association and AARP, Dr. Ethel Percy Andrus.

May each of you strive to follow in her footsteps, to practice her philosophy, “to serve, not to be served,” “to recognize the personal dignity and usefulness of the individual,” and to help our members attain “purpose, independence, and dignity.”

Let me, as one of your (state or national) officers, pay tribute to the membership of this unit. It is to be remembered that success will come to your new officers with your cooperation and counseling.

Unit Structure and Organization

We honor the outgoing officers by expressing our appreciation for the outstanding service and leadership all have given to this unit. Each one assumes the responsibility of passing all official records to their successor at the close of this meeting (or at the end of the fiscal year).

To officers on left:

- Do you promise to perform all the duties of your respective offices faithfully as stated in the bylaws? (We do.)
- Do you pledge allegiance to the president in his/her efforts to carry out the objectives of the REA? (We do.)

To president on the right:

President _____, you have been elected to serve _____ [REA NAME] as President. The unit is to be congratulated upon your election. You have been chosen because of your ability and trustworthiness. It will be your responsibility to lead the organization in all its endeavors.

President _____, do you pledge faithful performance of your duties as President as stated in the bylaws? (I do.)

To members:

The audience, please rise.

- Do you pledge loyal support to these officers you have chosen and cooperation to make this administration a successful one? (We will.)
- Do you pledge to be responsible for helping, planning, and offering service and fellowship to retirees? (We will.)

Your president and other officers come to you with high hopes. Still, they can do nothing without your loyal support and cooperation, and commitment to the mission. You can go far and accomplish much if you all work together.

Thank you, and please be seated.

To officers:

President _____ and other officers, I now declare you duly installed. Before turning the program over to the president, I would like to say, "May you have a rewarding experience in your leadership of the REA." (Shake hands with the officers and president; turn the meeting over to the president.)

Unit Structure and Organization

Unit finances

Units may need funds for many reasons:

- To hold events and gatherings to attract new members.
- To publish newsletters.
- To print and mail membership renewals and other marketing materials.
- To send representatives to state and area meetings, conventions, and workshops.
- To purchase equipment and supplies for unit operations.
- To support unit activities.

Units raise money through dues, contributions, and fundraising projects

Dues

The amount of dues varies among units. Membership dues paid directly to the unit are additional to and distinct from state REA dues. Units may set dues annually, every five years, for life, or other frequencies.

Contributions

Voluntary contributions can be suggested for specific purposes, including refreshments, unique gifts, flowers for members, etc.

Fundraising projects

The unit can add other ideas to the following list of projects to raise funds for:

- Grants: donations to current teachers for classroom materials and needs.
- Scholarships: grants to college students studying education and launching teaching careers.
- Entertainment: films, concerts, speakers, shows, cooking, arts and crafts, demonstrations, and readings.
- Recreation: sports tournaments and clinics, golf, chess, bridge, bowling, and table tennis.
- Parties: game parties, dinner dances, riverboat parties, bus tours, industry tours, luncheons.
- Bazaars: including snacks and drinks, games, and demonstrations.
- Sales: bake sales, auctions, arts and crafts, and rummage.
- Tours: house, museums, and gardens.
- Services: toy repair, gift wrapping, and mentoring.

Unit Structure and Organization

Unit newsletter

A unit newsletter helps keep members informed, announces upcoming events and activities, and keeps the community aware of how the unit serves retired educators. In some states, the units across the state exchange newsletters to share news and ideas.

A good newsletter includes:

- Announcements about upcoming events, meetings, and activities; in addition to a detailed description of events, consider adding a calendar or bulleted list of dates for quick reference.
- Ways to participate and get involved.
- Pictures and photos to add visual interest and celebrate leaders and volunteers.
- Ways the unit is giving back to the community.
- Articles about issues of importance to members (financial security, health, etc.).
- Legislative and advocacy updates.
- Newsworthy items about member activities.
- Highlighting and celebrating volunteers.
- A personal message from the unit leader(s).
- Information about the demographics of the unit.

A good newsletter is published frequently enough for members to rely on it for information about events and relevant issues.

If unit dues are not enough to cover the cost of providing the newsletter to every member, explore email distribution for members with email addresses, and posting on the website. The unit should keep an archive of past issues for members and the public.



Find effective communication tips including strategies to effectively tell your story and craft engaging conversations with your audience, starting on page [62](#).

Unit Structure and Organization

Unit bylaws

Unit bylaws are the basic ground rules for conducting the business and programs of the unit.

Standing rules

Units usually find it necessary to have standing rules for basic administrative procedures. Standing rules should be consistent with the unit's bylaws and are developed on an "as needed" basis. The unit's board of directors usually authorizes and makes changes in standing rules.

Areas that can be covered by standing rules include

Nominations and elections

Number of persons on the nominating committee, method of selection of the nominating committee, procedure for conducting elections, dates of installation, etc.

Finance

Budget procedures, emergency and special funds, number of authorized signatures, dues, amount to be spent on gifts and memorials.

Membership records

Member names, addresses and pertinent information, mailing and email lists, lapsed memberships, etc.

Meetings and social functions

Time, place, dates for board meetings, special observances; procedures and policies for tours and similar activities.

Miscellaneous

Newsletters, procedure for retention and release of unit records, unit leader addresses, and procedure for amending the standing rules.

Unit Structure and Organization

Sample unit bylaws

These sample bylaws are offered for informational purposes only. When drafting bylaws for your own organization, you should consider consulting your legal counsel for advice and review to ensure your by-laws are in compliance with applicable law.

ARTICLE I – NAME AND LOCATION

Section 1: The name of this association shall be the _____, hereafter referred to as “the association.”

Section 2: The location of the principal office of the association shall be determined by the executive board.

ARTICLE II – PURPOSE

The purposes of the association shall be:

- To cooperate and collaborate with the _____ [state REA].
- To cooperate with and use NRTA: *AARP’s Educator Community* as a resource for information and strategies to build membership and engage volunteers.
- To maintain and improve the social, educational, economic and recreational welfare and status of retired educators in the local community, state and nation.
- To help retired educators maintain identity with the educator profession, to further the cause of education, and to provide opportunities for meaningful contact with associate school personnel.
- To gather and disseminate information of value to members.
- To provide an organizational framework through which retired educators can continue a life of service to fellow members, their active colleagues and the community.
- To respond to community needs and to encourage retired teachers to contribute their talents and experience to the decision-making processes in their local communities.
- To present the image of aging as one of dignity, independence and purpose.
- To encourage active educators and school personnel to prepare for retirement.
- To familiarize retired and active school personnel with the benefits of membership in the local, state and national associations.

ARTICLE III – GOVERNANCE

The association shall be governed by its own official adopted bylaws. These bylaws shall in no way conflict with the Constitution and Bylaws of the _____ [state REA].

ARTICLE IV – AFFILIATION

The _____ [association name] shall be affiliated with the state REA.

Unit Structure and Organization

ARTICLE V – MEMBERSHIP

Section 1

Active membership shall be open to any retired or former educator, administrator or school personnel who have been employed in any educational institution or in the field of education.

Section 2

Associate membership shall be open to any active teacher or other person interested in the work of the association and approved for membership by the board of directors.

Section 3

Life membership shall be open to any member eligible for active or associate membership.

ARTICLE VI – FINANCE

Section 1

Fiscal year. The fiscal year of the _____ [association] shall correspond with that of the _____ (state REA) and shall begin _____ (date).

Section 2

Dues. Amount of dues. The annual dues of active members shall be _____ USD. The annual dues of associate members shall be _____ USD. Dues for life members shall be _____ USD.

Payment of dues. Dues of all continuing members are payable to the unit treasurer within a three-month period after the start of the fiscal year.

New members. Dues of new members received by the treasurer within three months of the end of the association fiscal year shall be credited to the following fiscal year.

Section 3

Finances. The association shall provide for such audit and control of its finances as are necessary for their complete accounting and safekeeping.

ARTICLE VII – OFFICERS

Officers. The elected officers of the association shall be a President, Vice President(s), Secretary (or Corresponding Secretary and Recording Secretary), and Treasurer (and any other offices the REA deems necessary.)

Unit Structure and Organization

Duties

President. The President shall:

- Preside at all general meetings and at meetings of the executive committee and the board of directors.
- Appoint, with the approval of the executive committee, chairpersons of standing and special committees, except the nominating committee.
- Serve as ex-officio member of all committees, except the nominating committee.

Vice President(s). There shall be a Vice President of the association to work with the President and substitute for him or her when necessary. The Vice President shall perform such duties as are assigned by the President or executive committee.

Secretary. The Secretary shall:

- Record and keep a permanent file of the minutes of all general meetings, of the board of directors, and the executive committee.
- Have available for reference at all meetings a copy of the association bylaws, a list of officers and committees.
- Have charge of such correspondence as is delegated by the President or the board of directors.
- Keep on file all incoming communications and copies of all outgoing correspondence.
- Make sure that copies of relevant correspondence and other materials are sent to the appropriate state REA offices.
- Forward to the state REA all appropriate information, including names and addresses of new officers and committee chairpersons.

Treasurer. The Treasurer shall:

- Be responsible for collecting and recording the receipt of dues.
- Be responsible for recording any other monies.
- Be responsible for paying all bills provided for in the budget or confirmed by the President.
- Be responsible for keeping a proper set of books.
- Be responsible for rendering a financial report at the annual meeting and at such other times as is requested by the executive committee or board of directors.
- Serve on a budget committee (if necessary.)
- Present the association's books for annual audit.
- Issue membership cards (if applicable).
- Forward members' dues to the state REA treasurer.

Unit Structure and Organization

ARTICLE VIII – BOARD OF DIRECTORS

Section 1

Membership. The board of directors shall include the officers and the chairpersons of the standing committees.

Section 2

Duties. The board of directors shall:

- Carry on the business of the association.
- Have the general power to administer its affairs between general business meetings and shall report its actions to members.
- Be subject to the orders of the association and none of its actions shall conflict with action taken by the membership.
- Submit to members a budget for the year, to be voted upon at the next regular meeting of the unit.
- Recommend, when feasible, establishment of additional standing and special committees.

Section 3

Meetings. Meetings of the board shall be held at least four times a year. Special meetings may be called at any time by the President or upon the written request of members of the board of directors or _____ members of the association.

Section 4

Quorum. A majority of the membership of the board of directors shall constitute a quorum.

ARTICLE IX – EXECUTIVE COMMITTEE

Section 1

Membership. The executive committee of the board of directors shall be composed of the elected officers.

Section 2

Duties. The executive committee shall:

- Have emergency power to act for the board of directors between meetings of the board.
- Provide for such audit and control of funds as are necessary to assure their safekeeping and complete accounting.
- Perform such other duties as necessary from time to time.

Unit Structure and Organization

Section 3

Meetings. Meetings of the executive committee shall be called at the request of the President. The incoming or continuing President may call a meeting of the executive committee prior to _____ for the purpose of approving appointments and making plans for the coming year.

Section 4

Quorum. The majority of the membership of the executive committee shall constitute a quorum.

ARTICLE X – ELECTIONS AND TERMS OF OFFICE

Section 1

Nominations. A standing nominating committee of _____ members, elected by the (association or association board) shall work on a year-round basis. At least three months prior to any annual election, this committee shall prepare a slate of nominees to be presented at the annual meeting. This slate shall be announced at least two months prior to the election or presented in writing to each member at least three weeks before the election. Nominations can be made from the floor provided prior consent of the nominees has been obtained.

Section 2

Elections. Elections shall be held at the annual meeting. A majority of the votes cast shall be necessary for election. In cases where there is but one nominee for office, a voice vote can be taken.

Section 3

Terms of office. All officers shall take office on _____. All officers shall serve for a term of _____ years or until their successors are elected and take office. They shall be eligible for reelection for one term only.

Section 4

Vacancies. All vacancies in office shall be filled for the unexpired term by the executive committee or board of directors, or by the President with the approval of the executive committee.

Unit Structure and Organization

ARTICLE XI – COMMITTEES

Section 1

Committee.

Standing committees. There shall be the association standing committees as follows:

- Community service.
- Health care.
- Information and protection.
- Legislation and advocacy.
- Membership.
- Nominating.
- Program.
- Public relations (or publicity).
- Retirement planning.

Additional committees. There shall be additional standing and special committees as shall be considered necessary to carry on the work of the association.

Section 2

Duties of chairpersons. Chairpersons of committees shall:

- Establish a regular meeting schedule and develop committee objectives.
- Develop committee activity reports for the REA Association President, board and membership.
- Serve as channels of communication in their respective fields with the state REA, and coordinate work with that of the state REA.
- Motivate members to carry out their responsibilities; involve all committee members.

ARTICLE XII – MEETINGS AND QUORUM

Section 1

Meetings.

Regular meetings. Regular meetings of the association shall be held _____ (frequency), on the _____ day of the month.

Special meetings. Special meetings may be called by the President, by the board of directors, or by written request of _____ members.

Notice. Notice of the date and the business to be brought before any meeting shall be communicated to the members at least _____ days in advance. Only business for which notice has been given shall be transacted.

Unit Structure and Organization

Annual meeting. The annual meeting shall be held during the month of _____ and shall be for the purpose of electing officers, receiving reports of officers and committees, and for such other business as may arise.

Section 2

Quorum. _____ of the membership of the unit shall constitute a quorum.

ARTICLE XIII – RULES OF ORDER PARLIAMENTARY AUTHORITY

The rules contained in Robert’s Rules of Order Revised [or specify another established rules codification] shall govern this in all cases in which they are applicable and in which they are not inconsistent with these bylaws.

Engaging Younger Members

Finding volunteers and new leaders

As we begin to work towards engaging new retirees it is important to take note of the demographic makeup of the education field and make an effort to engage the next generation of retired educator leaders.



Look it up

Take a moment to see how your community has changed in the last five years in general and within the education field.

An example of how to frame this analysis could be: “The Latinx population in this area has grown in the last x years, at the same time only X% of teachers are Latinx.”

There are many sources to find relevant data, including:

American Community Survey Data Profiles:

<https://tinyurl.com/acsdatabprofiles>

American Community Survey Narrative Profiles:

<https://tinyurl.com/acsnarrativeprofiles>

National Center for Education Statistics, Characteristics of Public School Teachers:

<https://tinyurl.com/educationfieldcharacteristics>

Six maps that reveal America’s expanding racial diversity:

<https://tinyurl.com/brookingsmaps>

The danger of a single story

Novelist Chimamanda Ngozi Adichie writes how believing in and spreading one story about a community is ultimately detrimental to it as a whole and to the individuals who comprise it. The presentation and repetition of one story or demonstration shows a group of people as one way, a monolith. This generalization thereby erases the humanity of members of a community. It is, instead, supplanted with stereotypes which then become adopted as truth. A single story does not build bridges. It only highlights the differences between people and not the elements that bring different groups of people together. Acknowledging and uprooting the single story is crucial as units work within their respective communities.



Look it up

The Danger of a Single Story:

<https://tinyurl.com/TEDdangerofasinglestory>

Engaging Younger Members

The nominating committee

The nominating committee plays a significant role in ensuring that the diversity of individuals and perspectives in the unit's composition translate to committee membership. The nominating committee works closely with other committees, and membership as a whole, year-round to ensure a broad selection of active members for leadership positions.

The unit bylaws should spell out how long in advance the slate of nominees should be presented to the membership and the method for doing so.

Leadership development

The success of an REA unit depends on volunteers with outstanding leadership skills. While most retired educators developed and used many leadership skills during their professional careers, being a leader in a unit may require a different set of leadership skills. Consequently, providing unit members with an opportunity to renew and enhance practical leadership skills is essential. It is also important for the unit leadership to create a positive environment that welcomes new volunteers with diverse skills and experience and brings new attitudes and ideas that can help refresh the unit's work.

Unit commitment to developing leaders

Make leadership development a priority by:

- Delegating responsibility and authority for leadership development. Sometimes the board and executive committee assume the task. In other units, it's the responsibility of the membership or other standing committees.
- Identifying leadership training provided by the state REA or other organizations.
- Developing position or job descriptions for each key volunteer position. Include in the position description a list of qualifications that the candidate should possess or have the capacity to develop.
- Identifying needs and provide adequate resources (training, mentoring, etc.).
- Conveying a sense to all members, especially new members, that everyone with leadership skills is needed and wanted.
- Creating a culture where all current officers are ready and willing to mentor new volunteers.
- Involving all members in the process of identifying and recruiting qualified leaders.
- Setting goals on diverse representation and ensure you have plans to support and include new voices in leadership roles.

Engaging Younger Members



Look it up

Why Diverse Teams are Smarter:

<https://tinyurl.com/whydiverseteamsaresmarter>

How Diversity Makes Us Smarter:

<https://tinyurl.com/howdiversitymakesussmarter>

How Hiring With Diversity In Mind Leads To A Smarter Team:

<https://tinyurl.com/diversehiringsmarterteam>

Identifying potential leaders

Unit officers and other board members have both the opportunity and the responsibility to guide the unit forward, providing sound dynamic leadership to the members and the community. To achieve success in this regard, the unit and, in particular, its nominating committee, should devote considerable attention to identifying officers and future candidates who offer the following:

- The dedication to devote the time and energy to the duties and functions required of their elected or appointed position.
- The willingness to learn the REA's philosophy, policies, and practices.
- The willingness to participate in training and other learning opportunities to enhance their leadership skills.
- The ability to organize the unit's work, delegate assignments, involve the entire leadership team as appropriate, and evaluate the unit's progress.
- A desire to work well with others and be respectful of different perspectives and backgrounds.
- A willingness to recruit at least one volunteer for consideration for potential leadership positions, along with tracking diversity data and taking it into consideration when presenting nominations.

Personal observation

Members frequently underestimate the level of leadership skills they possess or may feel too timid to share them. Personal observation is an ideal way to identify qualified members to fill key leadership roles in your unit.

Genuine relationships allow for people to trust and be honest with each other. These efforts will pay off during informal interaction with members, in group activities, and/or involvement in different community settings. Leaders should keep their eyes open, be enthusiastic and proactively engage potential volunteers in conversation. All of us have social biases and personal experiences that have impacted our self-perception. Building meaningful relationships allows you to become acquainted with unit members and to suggest that they use their talents in appropriate unit positions.

Engaging Younger Members



Checklist: skills and qualifications for potential leaders

Use this form to log information about new volunteers and potential leaders:

Name: _____

Phone: _____

Email: _____

Check the skills and experience that apply

- A positive spirit.
- A strong communicator.
- Strong listening skills.
- Writing skills.
- Sound judgment and decision-making skills.
- Respect for others.
- A consensus-oriented approach.
- A willingness to learn, be flexible and open to new approaches.
- Commitment and passion to serving retired educators and the community.
- Honest, acts with integrity.
- Additional skills: _____

Specific areas of interest in which the member would like to become involved

- Officer _____ (list position).
- Newsletter editor and/or writing articles.
- Website manager.
- Speaker or trainer.
- Planning events or leading volunteer service programs.
- Building relationships with current school personnel (school districts, principals, teachers) to make connections with potential younger members.
- Diversifying our unit's membership and recruitment efforts.
- Other: _____

Availability

Time commitment the member is able to make: _____

Access to equipment and technology needed: _____

Engaging Younger Members

Delegate

Another way to determine if a member has the skills required for leadership positions in your unit is to delegate responsibilities to them:

- Start by inviting them to accept small assignments such as a mini task force or organizing a minor event.
- Ask them to serve as an assistant to another volunteer, such as the secretary or treasurer.
- Provide an opportunity for them to co-chair a committee or project with specific responsibilities and duties. This is an opportunity to determine the type and level of skill the member possesses and also help them learn to lead and direct others successfully. Carefully planned delegation helps members feel comfortable being a leader and usually results in their willingness to accept more challenging leadership roles.



Volunteer resources

Create The Good:

<https://tinyurl.com/nrtamanual1>

Volunteer w/ AARP:

<https://tinyurl.com/nrtamanual4>

AARP Tax-Aide Volunteers:

<https://tinyurl.com/nrtamanual5>

AARP Driver Safety Volunteers:

<https://tinyurl.com/nrtamanual6>

Connet2Affect:

<https://tinyurl.com/nrtamanual8>

Recruiting leaders

Once you have identified members who qualify for leadership positions in your unit, then it's time to recruit. One way to help make recruiting easier for you is to think about:

Who recruited you? _____

Why did you say, "Yes?" _____

How did you feel about taking on a leadership role? _____

Use these reflection questions to think about what worked and what didn't in your experience and use this information to guide your approach.

Engaging Younger Members

Once you have identified members who qualify for leadership positions in your unit, then it's time to recruit.

The greatest results occur when individuals are approached by the unit leaders most directly related to the position being filled. The person vacating the position is often the best qualified to answer questions regarding the opportunity. Some effective recruitment techniques include:

Exhibiting enthusiasm about the position and its importance

Providing a position description that includes specific details regarding:

- The position title.
- Purpose of the position.
- Description of duties.
- Responsibilities and time commitment per week/month.
- Duration of the commitment.
- Reimbursement available.
- Qualifications.
- Training provided.
- Describing the support the leader will receive.

Meet with candidates to discuss the position:

- Discussing the candidates' attitudes, ideas, and suggestions about the position.
- Identifying benefits to the volunteer.
- Asking the candidate what he/she can bring to the position.

→ **GLOSSARY**

Training:

Training is teaching, or developing in oneself or others any skills and knowledge that relate to specific useful competencies. Training has specific goals of improving one's capability, capacity, productivity, and performance. This training could be for meeting initial qualifications, or to maintain, upgrade or update skills in a specific area.

Coaching:

Coaching is about skills and knowledge acquisition and a method in which an individual is supervised by a manager to improve competencies and capabilities. Sometimes coaching is directed or required and has different outcomes and timelines for completion.

Mentoring:

A human development activity that represents a relationship in which a more experienced or more knowledgeable person (mentor) helps to guide a less experienced and less knowledgeable person (mentee).

Definitions from Invista Performance Solutions

Sorting Out Coaching vs. Mentoring vs. Training:

<https://tinyurl.com/training-mentoring-coaching>

Engaging Younger Members



Often in training, we develop static content that we do over and over again, missing one of the most important rules of adult-learning, that adults learn when the content is relevant to their current needs and challenges.

Look it up For more information, please see the following:

Adult learning theories and principles:

<https://tinyurl.com/theoriesandprinciples>

The Joys of Adult Learning:

<https://tinyurl.com/adultlearningjoys>

Training leaders

Consider offering training to members who accept leadership positions in the unit to help them fulfill the new job's roles and responsibilities. This includes both content and skills development.

An in-depth study of the content related to topics such as health care, community service, and retirement planning, for instance, provides new leaders with essential background information. This can be accomplished through printed materials, group discussions, audiovisual presentations, and seminars. It is the unit's responsibility to make sure that these resources are made available.

As members move into leadership positions, they may also require training to enhance their management skills. Opportunities should be provided for new leaders to renew their ability to lead meetings, supervise volunteers, plan and oversee projects, manage time and paper, resolve conflicts, develop and manage budgets, use technology, and communicate effectively.

Before offering training events or workshops, be sure to ask the new volunteers what they need to learn. Then develop your workshops to respond to those needs -- effective training results in successful, happy leaders. Contact your state REA for available training resources and suggestions.

Recognizing volunteers

Regardless of responsibility, level, or authority, all volunteers want and need to be recognized for their work. Recognition is the volunteer's assurance that his or her duties and accomplishments are valued. It is the one form of compensation units can afford to dispense liberally, universally, and enthusiastically.

Recognition can be as simple as a "thank you," or praise for a job well done, or it can be ceremonious. What matters is not so much the exact form it takes, but that the gesture is made.

Engaging Younger Members

To help develop volunteers' confidence in their leadership abilities, some form of public recognition can be important. If you feel that a volunteer has performed well as the chair or a member of a task force or committee, let the other group members know it. The next time you assign a volunteer to a leadership role, point out their past accomplishments and indicate your support.

In some cases, it may be appropriate to recognize a volunteer by offering him or her a leadership position. This is an excellent way to continue developing leaders to take on even more responsible positions and ensure that the group's top leadership is filled with experienced and committed volunteers.

Developing volunteers to assume leadership roles takes time and effort. It is your best investment in the future success of your unit and the most important legacy you leave behind.

How to build a dynamic REA culture

The culture of your unit is the environment created by your leaders, volunteers, and members. Culture is driven by a clear intention for what you want to create and how you go about making it. It is propelled by the clarity of your mission and vision, the conversations you keep, and the practices and behaviors you live every day.

Here are five strategies for retired educator leaders to create a dynamic culture within your unit. Whether it's thriving or stagnant, you and your organization have the power to strengthen, elevate, and transform it.

Check-in and be candid

Extraordinary leaders dare to initiate and guide tough conversations. Ask these questions of yourself, your unit, and your key stakeholders:

- “What three words best describe our current environment?”
- What's working well?
- What are the 1-3 elements of the culture that need to change?”

Close the gap between the current situation and the desired state using the next steps.

Rally around a powerful mission

Your mission statement defines what your organization does and the value you bring to your customers and audiences. It's the core purpose and the most fundamental reason for being in existence.

Engaging Younger Members

Your mission is focused on the here and now. Here is a quick template for a mission statement:

Our mission is to....(what do you want to achieve, do or become)...(reasons why it is important)...by...(specific behaviors or actions you can use to get there).

Is your mission clear, and is your team rallying around it with enthusiasm?

Here are two sample unit mission statements

Sample #1: To safeguard pension benefits, serve retirees and help each person enjoy their retirement.

Sample #2: We are the voice of retired public educators. We advocate and promote the improvement of pensions, benefits, and services available to active and retired public educators. We are committed to creating an enjoyable and prosperous retirement for all professional educators in our community.

Build a vision

Your vision statement is the future you see for retired educators and the community. It is a statement that describes what the world would look like when you achieve your mission. It is aspirational and forward-looking. Have you clearly articulated your vision and what you are committed to in this world? And are you actively sharing it?

Two sample unit vision statements include:

Sample #1: Our vision is for every retired educator to live in dignity.

Sample #2: Our vision is for every retired educator to receive their complete benefits package for life.

Define your values

Values represent the very essence of what's most important to your leaders and volunteers. Core values are the principles by which you work, run your organization and interact with your stakeholders. Identify your core values so you can begin to orient your brand and your organization around what matters most, such as integrity, service, diversity, concise communication, grit, creativity, innovation, etc. How are your volunteer leaders living these values every day? Are there any areas where you might be out of alignment with your core values? What patterns need to change?

Sample values include

Service

Integrity

Diversity

Enthusiasm

Passion

Compassion

Equity

Welcoming

Inclusion

Engaging Younger Members

Get specific with behaviors

Extend your core values by spelling out the specific behaviors it takes to live them. For example, for retired educators, serving is a core value. As an organization, you agree to approach every member interaction with this intention: “I’m going to serve this person in the most genuine way I can.”

Other principles to adopt that will transform your culture include

- **Integrity:** Honor your word. Commit to conversations that elevate, build, strengthen, or move ideas and people forward. Don’t tolerate gossip, sighing, whining, complaining without solutions, and/or tearing ideas or others down.
- **Communication:** Speak the truth faster. Understand, then stand under. Always communicate with a purpose – before speaking, know why you are talking, what you are sharing, what you want to accomplish, and what experience you want to leave with your audience.
- **Teamwork:** Ask, ask, ask. Ask for help, ask for ideas, ask for support. Take 100% responsibility, and in any situation where you think you already are, ask what it would look like if you took 5% more responsibility.
- **Persistence:** Any loss is a challenge to better prepare. There is a way through every block and a creative, innovative, and workable solution to any challenge.
- **Diversity:** We value everyone. The best organizations are rooted in representation of the communities where they live. This includes race, ethnicity, sexual orientation, religion, and political views. The most purposefully diverse units are usually the most vibrant and impactful.

Be sure to check out NRTA’s image and branding toolkit

Engaging Younger Members

Tools to engage younger members

Tools of the Star Framework



Setting

You can use various techniques to create an experience setting that the age 50 to 64 demographic finds innovative and appealing.

Use location to define the audience's feelings. Along with selecting the time, determining location often is one of the first planning tasks. When making this important decision, consider:

Meeting people where they are. This means choosing a location in a neighborhood close to or near where people live and work or central to a cluster of people. As a rule of thumb, most people won't travel more than 30 minutes to attend an event.

1. Do you know where the majority of members live?
2. What are some popular places where members gather?
3. Ask numbers, age, neighborhood.

Piggyback on a popular spot. Take advantage of existing popular locations to make your experience more accessible. This could mean planning experiences around local festivals, sporting events, farmer's markets, or other community happenings.



Look it up

Information on local forums for members to stay connected to other members

Community Connections:

<https://tinyurl.com/nrtamanual2>

AARP In Your State:

<https://tinyurl.com/nrtamanual3>

Welcome to AARP Near You:

<https://tinyurl.com/nrtamanual7>

AARP Resources for Fighting Social Isolation:

<https://tinyurl.com/nrtamanual9>

Engaging Younger Members

Make it easy to get there. Choose venues with easy and (ideally) free parking. Ensure that your space is accessible and has good lighting and signage that marks the event entrances. You don't want a newcomer lost because they couldn't find the right door.

Look for local flair. Find spaces that are unique and special to a community. Choose a place people know and love or find a hidden gem that reflects the town. This familiarity will help people associate your unit with a location they love. Your event's layout is essential. Zones help by signaling what is going to happen when and where.

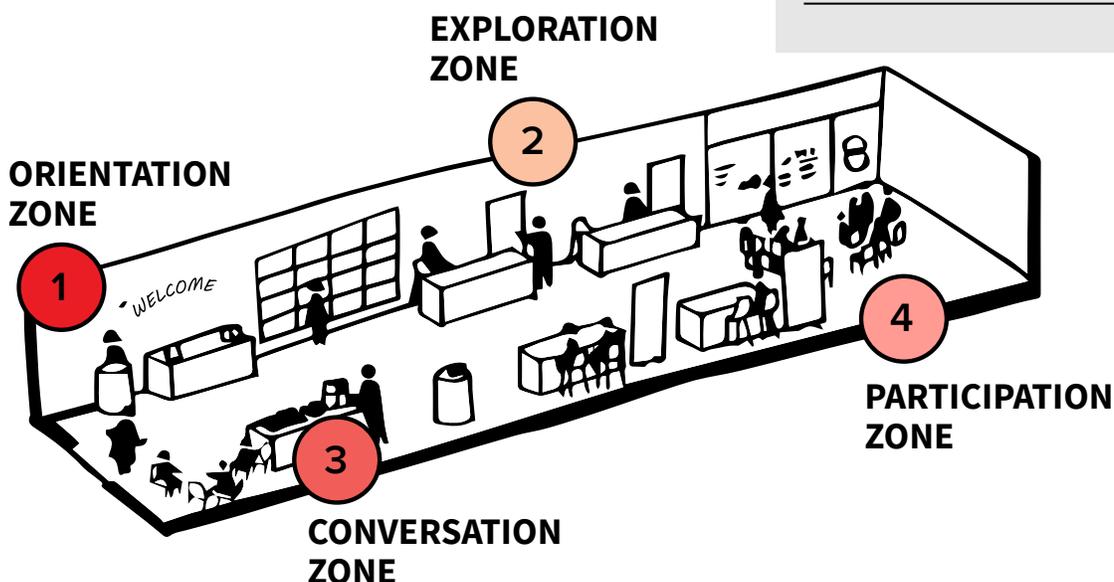
Once the location is selected, design the space for your experience to influence how people interact with each other. You will shape their impression of your unit. For example, utilize "zones" that you want people to experience.

REFLECTION

Have you been to an event where the experience was so seamless and positive that you felt the desire to come back?

What was great about it?

What can you replicate?



Engaging Younger Members

Checklist for setting



Location

- In the community.
- Within a 30-minute drive of your demographic. A popular spot or has a local flair.
- In a place that has good energy and provides the appropriate environment and is accessible (easy to find and arrive); has parking (preferably free).
- Has atmosphere (a place with a garden, a chalkboard wall, good lighting, sound system, etc.).



Orientation Zone

- A place to transition from the outside world.
- A host who warmly welcomes guests, provides event details and marks attendance.
- Information for the event.
- Nametags.



Exploration Zone

- A place that encourages people to open their minds, think broadly, and network; tables, stools, and display boards.
- A photo board of recent volunteer work or a question posed to spark dialogue or prepare for a conversation.



Conversation Zone

- A place to connect with others; refreshments including finger foods and beverages.
- A connector who invites people to refreshments and introduces people; tall cocktail tables to encourage mingling.



Participation Zone

- A place to “dig in,” get hands-on experience, or participate in a workshop.
- A communal table, workshop benches with stools, or a movable seating area.

Engaging Younger Members

Tone

Elevate your experiences with tone.

Tone is the mood and energy people feel when they walk into a room. We see tone carefully constructed in the retail landscape by stores like Target, Apple, Whole Foods and Trader Joe's. Think of how you feel and/or the experience you have when you enter these stores. You can use the same tools to elevate the experience that you are planning.

REFLECTION

How was the first meeting you attended with your unit

Checklist for tone



Language, Branding & Visual Style

- Keep language optimistic. Always choose an upbeat tone in written and verbal communications. Frame situations in a positive light when possible.
- Keep it simple. Choose one font. Leave out clip art that could distract people. A few thoughtful words and one crisp image set tone effectively.
- Use color conservatively or to reflect the mood you want to set. Choose one or two colors and stick with them.
- Reflect a younger image. If you opt to use photos, choose ones that have images of younger people. People aged 50 - 64 will find communication more relevant if they see pictures that look like themselves.
- Lead with substance. Start communications with inspiring content and engaging experiences.



Lighting & Decor

- Sunlight. Use natural light when possible. Sunlight energizes people and creates an upbeat atmosphere.
- Portable "up lights." These are lighting fixtures that are placed on the ground that shine toward the ceiling. If you have fluorescent lighting, a few portable up lights will add warmth to your room.
- Candles which provide a warm intimate atmosphere.
- Fresh flowers which bring fragrance and make a room more lively.

Engaging Younger Members



Sound & Music

- Use music strategically. If you have a room that is too big for your group, playing soft background music is a subtle way to make the space feel less empty.
- Be thoughtful about volume. Consider that some people may have some degree of hearing loss, making it hard to discern conversations in a loud room. Music that is too loud can make it difficult for people to hear.
- Consider culture. Music is an important part of a community gathering and is an important element to build inclusivity and make people feel welcome.



Dress & Uniform

- Be approachable. Choose clothing that makes you feel comfortable and confident. When hosting an event, err on the side of less formality, so others feel comfortable approaching you.
- Wear a nametag. Nametags break down barriers and encourage networking. The best nametags are ones that also provide a conversation starter like a hobby or interest.



Food & Beverages

- Think cocktail party, not cafeteria. In most cases, people are far more likely to appreciate a beautiful platter of hors d'oeuvres rather than a plate of the standard chicken breast.
- If you serve alcohol, make sure there are plenty of non-alcoholic beverages available; people appreciate locally brewed beer and local favorite foods.
- Use serve ware as a decorative element. If you've chosen colors for your event, use those colors for plates and napkins. Choose clear plastic cups if glass is not available.
- Create a local feel. Food and drinks are a great way to show that you are part of the community. When a newcomer comes into the room and sees a local food or beverage, you help them feel at home.
- Be a good host. Offer a warm welcome and have someone assigned to offer beverages and food.

Engaging Younger Members

→ GLOSSARY

Manhattan: “Dating back to the 1880s, the Manhattan remains one of the most ordered drinks in bars and lounges, Traditionally made with rye whiskey, sweet vermouth, and bitters, this drink has seen a plethora of adaptations over the years like swapping brandy or bourbon for the classic rye whiskey.

Old Fashioned: While a gin-based version of this famed cocktail was first published in 1862, the modern Old Fashioned came later in 1880 when bartender James E. Pepper first mixed the drink in Louisville, Kentucky. In Wisconsin, the Old Fashioned is typically made with brandy.

Margarita: Made with tequila, the drink became popular during Prohibition when Americans would cross the US-Mexico border for alcohol. Served on the rocks or blended, a classic margarita is 50% tequila, 29% Cointreau and 21% fresh lime juice.

Information and Definitions from Taste of Home- 46 Cocktails You Need to Know:

<https://tinyurl.com/mixeddrinkstoknow>

We hope these tools inspire you to invest time in carefully examining tone as you plan experiences. You will strengthen your event by intentionally creating the right tone for your experience.

REFLECTION



Anything that is missing from your dress and uniform list?

Engaging Younger Members

Action

Inspire people with a great experience

Action is about the substance of your experience and includes four concepts. These stages are relevant for all-day events like conventions, shorter meetings, or even an email invitation. Below are tips and tools which will get you on your way to creating an even more substantial, action-oriented member experience!

Spark: This means catching your member’s attention and getting them interested in the experience. Ways to create spark include:

- Give people a warm welcome when they come in the door. Ensure someone is there to meet them, take their coat, and get them a drink.
- Always ensure a personal greeting, especially in written communications. At the beginning of an email, “Dear Friend” is more welcoming than “Dear Valued Member.”
- Pose a thought-provoking question. Ask people to weigh in on a topic that matters in the community. Or, ask people how they heard about the event and why they chose to come.
- Use inspiring imagery to set the tone and context.
- Orient people with a schedule of events or a map. This will help members understand what will occur at the event.

Tools for sparking engagement include:

A registration table. People often look for this when they come in as it helps them orient themselves. Make the table more inviting by swapping a long table for a higher table that puts everyone at eye level.

An agenda. Put up a large-scale poster of the agenda so that people can get excited about what’s to come.

A gallery wall. Create a display that asks people relevant questions. For example, at an event about transitions, you might ask, “If you could take up a new hobby tomorrow, what would it be?” and have choices both serious (painting and swing dancing) and silly (tattoo artistry and pet grooming).

A passport. A card or small pamphlet containing details of the experiences available at an event and has spots for people to collect stamps from each one.

REFLECTION

Look at what has worked before to spark engagement; how can it be improved



Engaging Younger Members

Connect: This means linking people to each other and cultivating conversations. Ways to connect include:

- Make introductions. Find out a few relevant details so you can help attendees connect.
- Use nametags and icebreakers to make it easy for people to connect. Relate these to the topic of the event. For example, at a gardening event, ask people about their favorite season; for a cooking event, ask people about their favorite pasta dish.
- Provide designated periods for mingling before and after an event.
- Design events to have small breakout groups where people get to know each other in more intimate settings.
- At seated events, ask people to turn to their neighbor and introduce themselves.
- Use a networking framework. Ask people to share what help they're looking for and what help they can offer others.
- Provide links to online communities and forums.

Tools for connecting people include:

- Nametags. These are essential and even better if they include an icebreaker question. Sheets of name tags can be run through a standard computer printer.
- Icebreakers. These can also be simple cards that are left on cocktail tables, on chairs, or by the food and drink to spark conversation. You can even give them to people as they're walking into an event. Taking it a step further, print these on sticker paper and attach them to cups so people's drinks are automatic conversation starters.
- Online forums and communities. These digital outlets are a great way to promote discussion and allow people to support each other. For the age 50- 64 audience, they are best when used to complement in-person forms of engagement. Forums you choose may include tools such as Facebook and informal email lists.

Participate: This means engaging people in an activity. Ways to engage include:

- Think about every event as an activity, rather than a presentation. For example, instead of a presentation on cyber-security, host an event where people learn how to create and maintain secure passwords. Or instead of a presentation on brain health, host brain health trivia night, where people learn how to keep their minds agile by doing just that.
- Use props to make content tangible. This is easy for topics like gardening or cooking that are naturally hands-on, but you can also do this for topics that seem more abstract. For an event on financial security, you might give participants fake money and ask them to allocate it into different piles. Then show them what an optimal allocation looks like. Asking people to do something hands-on prompts people to reflect on their own situation and makes the learning personal.

Engaging Younger Members

- Invite local organizations to create activities for members. This gives organization a better way to highlight their resources and tools and makes it fun for members, too.
- Direct people to places in the community to get involved. Provide links to events, programs, or volunteer opportunities hosted by community organizations that might interest members.

Tools for inviting participation

- **Props.** Whether it's plants and pots at a gardening event or trivia cards at a brain health event, have something tangible for attendees to interact with.
- **Games.** Look for ways to transform content into a game. For example, at a career event you might offer groups of participants a hypothetical career transition and challenge them to come up with the greatest variety of options for that person. Play makes content more memorable for people.
- **“Hot-or-Not” paddles.** Break up a traditional presentation by giving participants Hot-or-Not paddles for them to share in real time what they like (Hot) and what they don't like (Not). These tools give people a fun and active role in the discussion. Adhere two pieces of cardboard paper on a wooden stick; one side says “Hot,” the other “Not.”
- **Feedback boards.** Post feedback visibly on a wall where others can read and add their comments. This makes feedback accessible and makes people want to join in.

Extend

Give people ways to engage again or have more options to participate in the future. Ways to extend include:

- **Offer small steps.** Give people simple actions they can take that will improve their lives. The best small steps have a short-term payoff, helping people see the rewards of their actions and motivating them to make even bigger changes.
- **Provide resources for more future interaction.** People are often overwhelmed by a lot of content in the moment, but happy to read up when they get home. Make non-profit and government resources, including pamphlets, web links, and organization information available at the end of an event or interaction.
- **Prompt effortless reflection.** Follow up with members after an experience. Give them easy ways (not a long survey) to reflect on their experience and the value they received. A quick comment card or a set of voting jars are great ways to cultivate this feedback, letting people be heard without making it feel like a chore.

Engaging Younger Members

- **Share next steps.** For example, after a gardening event, let people know about local community gardens and upcoming planting days. Or as part of a fitness resources, let people know about fitness events going on in the community, such as free morning yoga classes in a local park. Even if the events aren't sponsored by your unit, people will feel grateful and give you credit for the referral.
- **Make it easy to share.** Whether these are digital or tangible, give people ways to share the experience with others in their lives.

→ GLOSSARY

Inclusive

Hashtag: The pound symbol on your keyboard - also called an octothorpe - was initially used to mark numbers. Think of hashtags as a way to connect social media content to a specific topic, event, theme or conversation.

See How to Use Hashtags:

A Quick and Simple Guide for Every Network:

<https://tinyurl.com/hashtagsinformation>

Tools for connecting people together include:

- **Takeaway cards.** Give people a small quarter-sheet sized card (or index card) to take away with them that shares small steps to help them get started. Keep information bite-sized to make it easy for them to take the next step.
- **Local resource lists.** Create a list of local resources around a topic and provide it after events or share it via an update. This may include AARP resources as well as relevant content from other local organizations.
- **Comment cards.** These make it easy for people to give quick feedback. Keep these to no more than 6-8 brief questions. You can also use this as an opportunity to gauge interest in future participation; give people opportunities to raise their hand to help co-host or plan a future event or activity.
- **Voting jars.** Just as with offering voting jars to get quick feedback at the close of an event, taking a few mason jars and writing some ideas on them, for instance on possible future events, can be a great tool for lowering the barrier to giving feedback, while making the process social and fun. Just ask people to “vote” by placing a marble in their favorite jar!

We hope these tools inspire you to invest time in carefully examining “action” as you plan experiences. You will strengthen your event by incorporating them into your experiences.

Engaging Younger Members

Checklist for action

Ensure that your experience does the following:



Catch people's attention and get them interested in the experience

- Give people a warm welcome with a personal greeting.
- Pose a thought-provoking question.
- Use beautiful, inspiring imagery to set the tone.
- Orient people with a schedule of events or a map.



Connect people and cultivate conversations

- Make introductions and use nametags and icebreakers.
- Provide designated periods for mingling.
- Have a small break out groups.
- Provide links to online communications and forums.



Provide people with multiple options to participate

- Consider every event as an activity, not a presentation.
- Use props to make content tangible (for example, Hot or Not signs).
- Refer people to places to get involved – even if it isn't your REA.
- Show impact – celebrate successes and make people aware of what you've done.



Offer ways to connect

- Offer small immediate action steps where people will see a benefit.
- Provide resources to go deeper and share suggested next steps.
- Prompt effortless reflection – follow-up after an experience.

Roles

Roles provide us the opportunity to put our hearts into experiences.

Roles are arguably the heart of the member experience: it's about us and how we can put our best foot forward to make younger members feel valued. When planning events, it's helpful to have people assigned to these roles from conception to implementation:

Host: The host makes people feel welcome and sets the tone of the experience by greeting people, cultivating dialogue, highlighting what comes next in the program. When introducing speakers, a good host will provide context and background.

Connector: A connector is a social butterfly who connects like-minded people. This is done through ice breakers, warm conversation, and taking the time to talk to younger members and introduce them to other attendees.

Engaging Younger Members

Facilitator: A facilitator leads discussions that make people feel heard and supported by moderating Q&A, includes everyone in conversations, and ensures that presentations are interactive for the audience.

For some events, we might wear multiple hats and handle more than one role. With other circumstances, we might have several leadership volunteers operating one role. Whatever the case, the important thing is to have someone responsible for ensuring each role is covered for an event. To welcome younger members, we need to ensure these roles are standard at events.

We hope this tool inspires you to invest time in carefully examining roles for your planning experiences. You will strengthen your event by incorporating these techniques into your experience.



A look at the past:

Do you know who has played these roles before?

Ask them what worked well or what they wished they did differently.

Checklist for roles

When organizing events, it is helpful to consider who will complete the following:



Host

Make people feel welcome and set the tone for the experience

- Greet people and emcee the event.
- Welcome people in a personal way and provide context with introductions.
- Cultivate dialogue, including follow-up.
- Highlight next steps – including how people can continue to participate if they choose.



Connector

Help people connect with like-minded peers and organizations

- Talk to members and introduce them to each other.
- Use icebreakers to get people talking right away.
- Leverage longer-term members and ask them to reach out to newer members.
- Don't get stuck in one conversation – be a social butterfly.

Engaging Younger Members



Lead discussions that make people feel heard and supported

Facilitator

- Lead discussion among members and moderate question & answers.
- Work with subject matter experts to make presentations more interactive.
- Work to include everyone in conversations.

Create a memorable experience

Here are five principles to incorporate into experiences, to make your events, communications and efforts more appealing to younger members.

- 1 Show up physically in the community**
 - Younger members want the physical experience in their community.
 - They don't want to have to drive too far.
 - They want to see pictures of their community in promotional materials.
 - The physical appearance of an event is important; they rely on first impressions.
- 2 Be a peer, not a parent**
 - They want you to treat them as a peer, not a parent. They want interactive discussions.
 - They want to be asked for their opinion.
 - When you ask them to do something, they want you to lead with why. What particular skill do they have? Why did you select them to do what you are asking of them?
- 3 Mix fun with purpose**
 - They want fun mixed with purpose (and who doesn't?).
 - Can they socialize and get involved with something?
 - Is the venue cool? Can they try that new restaurant that they have been thinking about, while learning?
- 4 Less is more**
 - For them, less really is more.
 - They just want a taste of something, and to know the pathway to find out the information if they want more; consider doing shorter programs of an hour or less, no more than an hour and a half.
 - They want visuals with less information on them that are easier and simpler to read.
 - Similar to the approach outlined in the book, "The New Breed," guide your volunteer engagement much like you would on a first date.

Engaging Younger Members

5

Connect experiences together

- They want you to connect experiences together for them.
- They want to know that your unit is doing more than just this event; they want you to demonstrate connectivity.
- Calendar of events – at minimum, a save the date for the next event, and then follow-up email with a reminder of the next date.
- They would like to see something to show the last thing that your unit was working on in the community.
- They want to know when they are going to hear from you again.

Grow Membership with Fresh Programming

10 strategies to grow your membership

Go for the goal



- Set a defined goal to increase membership for the next year.
- Keep membership goals in the forefront of members' minds.
- Regularly remind members of the goal.
- Spotlight efforts of individual members and local units.
- Graciously praise progress.
- Brainstorm with your members how to continue diversifying your unit.

Leverage members' personal relationships



- Ask your members to reach out to current and retired educator friends and invite them to join events and membership.
- Have your members clearly share with their friends why they as employed teachers should join.
- Ask members to invite teaching friends to join the Facebook page.
- Offer incentives for joining (theater tickets, dinner for 2, spotlight in newsletter).
- Hold informational sessions and/or house parties.

Incentivize your members to recruit



- Give a \$5 gift card to members for each new member they bring in who joins the unit.
- Offer gift cards to individual members who are the first to share names, addresses, email addresses and phone numbers of soon to be retiring educators and retired educators.

Organize units around “To Serve, Not to be Served” annual service day(s) that are open to everyone



- Announce date and location for event. Have interest sign-up for next event (at current event).
- Have a “Save the Date” printed for people to take with them.
- Invite prospective members to join this service event and message how they will give back to their community with like-minded friends.
- Promote event on Facebook in advance with sign-up.
- Boost post and take photos.
- Show fun and group pictures after and ask people to comment on what they enjoyed about the day.
- Ask location/venue to comment on Facebook with what was accomplished.

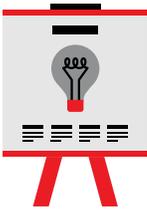
Grow Membership with Fresh Programming

Expand/adapt your membership model.



- Offer “continuing” members with bank auto-withdrawals to renew membership automatically.
- Message this as “member convenience.” Offer “aspiring” or “associate” memberships for those working, or who want to join but are of different professional backgrounds.
- Offer 3 year and 5 year memberships where members pay fees up front, rather than having to renew every year. Consider life-time memberships; denote age eligibility.
- Offer a one-time “issue-based” donation option for individual choice.
- Approach membership and scholarship goals within a framework of inclusivity and equity.

Create a membership campaign to focus efforts – “All Hands on Deck.”



- “Get a New Member” campaign – August 1 – September 30.
- “Membership Renewal Month” – October.
- Focus Renewals – October 1 – March 1.
- Bridge to upgrade membership. (Example: bridge a one year to three-year membership).
- Heritage celebrations and affinity groups.

Maintain a separate database of potential members and include those who don’t renew.



- Message during the legislative session with the reality of legislative fights.
- Focus on a common enemy – Billionaires with Political Agendas, etc.
- Join Today – It is your pension and your way of life at risk. Promises made are not always kept in this world. Offer a one-time option “issue-based” donation of an individual’s own choice.
- Follow-up – Many new retirees and potential members do not join right away but are interested. Stay consistent and contact repeatedly. When mailing, emailing, or calling, always invite them to join as a member. Include instructions on becoming a member with a membership form and a link to sign-up as a member.

Grow Membership with Fresh Programming

Make your dollars for messaging & snail mail count!



- Experiment to find what is adequate for your group and tailor mailings accordingly.
- Personalize by using their name rather than “Dear Educator.” Consistently stay on message. Always make it clear to the reader, “What’s in it for me?!”
- Pension Protection – The Threats are Real (Political Agenda of Billionaires/ ALEC, COLA, Stock Market Volatility).

Keep it positive and resist the naysayers!



- Always ensure there is networking/social time.
- Set a norm that everyone says hello and welcome someone new.
- Have them invite the person to sit with them.
- Coach volunteer leadership to message in a positive/empowering way during group activities.
- Ensure non-partisan messaging/no blaming.
- Make it a goal to protect new and younger members from “drama” at least in the first years.
- When negativity occurs, model with reframing using empowering language.
- Establish norms to create a space for safe, courageous conversations that help people move forward in the unit.

Build name recognition and visibility.



- Mail and email potential members.
- Participate in active educator conferences.
- Focus on social media, Facebook, Facebook ads, Twitter, website ads, newspapers, and magazines.
- Attend local community events (such as school openings and educator events) to represent the unit.
- Newsletter – have both a paper copy and e-newsletter.

Grow Membership with Fresh Programming



A look at the past:

1. What have been some of the most historic policy decisions affecting retired educators?

2. How has this had an effect on educators impacted in your own community?

Get support from your AARP state office

- Keep in mind that your AARP state office is actively engaging the 50+ audience around the state with robust programming, events and educational opportunities.
- Be open to discovering areas of synergy.
- There may be opportunities to use content-rich programming, take advantage of existing events and infrastructure, and identify ways to engage younger educators and retirees across the state.

Requests for your AARP state office

- Access to AARP state office conference rooms for your next board meeting.
- Opportunities for a retired educator to join the AARP state office executive council.
- A calendar of upcoming AARP events that would be of interest to retired educators; volunteer opportunities with the AARP state office's "Day of Service" event(s).
- An AARP state office representative to speak at an upcoming meeting or convention.
- Opportunities to include retired educator volunteers in their volunteer recognition event(s) and/or to be included in the state's Andrus Award Nomination.
- Collaboration on a joint volunteer recruitment event or multicultural outreach.
- Meeting with AARP legislative staff to identify shared priorities; ask how retired educators can participate in the AARP state office's lobby day.
- Access to state AARP training opportunities and including retired educators as participants.
- Collaboration with the AARP state office to facilitate a joint workshop, such as a "Pre-Retirement" seminar.
- A feature in the state office's blog story or social media highlighting the good work of retired educators.
- Your REA to be featured on the AARP state office's Facebook page with a link on how to get people to sign-up for membership.
- Inclusion in a state AARP bulletin article as a feel good story with information about how educators can sign-up.

Grow Membership with Fresh Programming



Look it Up

REA state office locator:

<https://tinyurl.com/reastatelocator>

AARP state locator:

<https://tinyurl.com/aarpstatelocator>

Collaborate with your AARP state office

- Programs to engage retirees & younger members.

Mentoring youth

- AARP Experience Corps.
- Grandparents' Essay (+ outreach to legislators).
- Financial resilience & wellbeing for 50+.
- Tax Aide: volunteer-run tax prep and assistance
- Financial Resilience: workshops to support long-term financial health.
- Encore Entrepreneurs: mentoring for 50+ to start new businesses.
- Workforce: support for 50+ in the workplace.
- Life Reimagined: personal reinvention in retirement.

Knowledge, support & resources

- Health & Caregiving: Affordable Care Act and Medicare.
- Livable Communities Home Fit: a guide to ensure a safe, comfortable home.
- Driver's Safety: refresher course and safety tips.

Advocacy

Determine priority issue areas for retired educators and identify common areas for collaboration.

- Federal Advocacy.
- State Advocacy.
- Local/Municipal Issues.
- Pension Advocacy.

Volunteers

- Day of Service. (September 11)
- Volunteer Recognition and Andrus Award Events.
- Multicultural Outreach.
- Participate on AARP State Office Executive Board.

Specific Communities

Ask about AARP's target communities in your state. Where are they focused, where are upcoming events scheduled?

- Communities of Presence.
- Livable Communities.
- List of upcoming events in local towns or cities.

REFLECTION

What's the most important issue for you?

Who has the power to make a difference?

Is this person in relationship with you or your unit?

NRTA pension infographics toolkit

NRTA developed a tool designed to help you protect the hard-earned pension benefits of retired teachers - NRTA's Infographics Toolkit. Infographics are visual representations of complex data to help make information clear, concise, and understandable. The infographics cover a range of pension-related topics, and will be useful to educate policymakers and other stakeholders about important pension and retirement issues.

Download the infographics ([Here](#))

- Pensions get retirement right.
- Comparing defined benefit and defined contribution plans.
- Keeping public employee retirement plans financially strong.
- Pensions: A good deal for taxpayers, employers and employees.
- Pension benefits and retiree spending provide important economic support across America.
- Women and Retirement.
- Retirement Security for Multicultural.

Advocacy toolkit

NRTA has provided REAs with an important tool to help them win real improvements in the lives of their members and other retired school personnel. NRTA designed the Advocacy Toolkit ([View Here](#)) to strengthen and support efforts on legislation and advocacy by providing best practice guidance and tips on a variety of effective campaign tactics, including:

- Op-Eds.
- Meetings with elected officials.
- Letters to elected officials.
- Fact sheets.
- Advocacy alerts.
- Direct mail pieces.
- Fundraising letters.
- Press releases
- Letters to the editor.
- Local ethnic media.

State pension fact sheets

NRTA funded research to help REAs educate stakeholders about the importance of the defined benefit plans(s) in their state. The State Pension Fact Sheets provide background information about each state's public retirement system(s) and key data about the importance of those systems.

A fact sheet for each state is available to [download here](#).

Advocacy

Direct Action Organizing trainings

NRTA continues to host Direct Action Organizing (DAO) training sessions that are designed to help REAs effectively plan and wage an advocacy campaign to improve the lives of their members. Working collaboratively with AARP staff and state offices, NRTA has helped REAs facing difficult legislative battles by providing group and state-specific DAO trainings. Please contact the NRTA office for more information and to schedule a training session for your group.

Pension education toolkit

NRTA developed this resource to help educate members and other stakeholders - particularly legislators and their staff - on a full range of pension issues. Prepared with the National Institute on Retirement Security, the toolkit is available here:

<https://www.nirsonline.org/resources/pension-toolkit/>

Advocacy scenario

Prompt: In this situation, imagine that there is an announcement that pensions are being cut in the community that you serve.

REFLECTION



What are we doing about it?

Example: Meeting with elected officials.

Why is this important?

Example: My name is Maria and I'm a retired educator that is disabled or relies on pension benefits for my livelihood.

Why is it important that we do that now?

Example: This bill affects my pension.

Why is it important that I'm involved?

Example: At AARP/NRTA we have to support future retired educators.

Communications and Social Media

Pre-communication checklist:

- ✓ Identify your audience. Put yourself in their shoes. What do they know about the retired educators organization and what is their perception? Communicate like you're starting a conversation, not picking up in the middle of one.
- ✓ What is your objective with the communication? What do you want the audience to walk away with (information, an experience, wanting more information)? Each audience member has his/her own perspective. Opinions may be diverse, and not always be what you expect. Are you accounting for that context? Is this particular audience skeptical? Enthusiastic? Unfamiliar with you?
- ✓ What are the most important and relevant things they want to hear about? Keep in mind that few people (especially younger audiences) read a piece of communication thoroughly. They glance quickly. Help them pay attention to the truly important information by narrowing your focus to the topics they're most interested in — like healthy living, financial and job resources, and saving money.
- ✓ What can you say to give them value? Or surprise them? Is there anything that might challenge this audience's expectations or preconceived ideas about your retired educators organization and your mission? Is there anything that would catch their attention or give them a new or different reason to connect with you?
- ✓ How could this go wrong? Could anything be confusing? Could anything make someone feel unwelcome? Could anything potentially stir up negative feelings toward your organization? You can discuss issues that could be perceived as confusing, controversial or negative. Just take extra care for how you communicate and the message you leave with the audience.

Four key steps to a good story

Sometimes the best way to share the retired educators' story is to tell a story about something you have done with members in the local community. And doing so successfully depends on picking the right example and talking about it in the right way so that it tells a broader story about who you are, what you do, and the benefits you bring to the community.

The four elements in this section are essential ingredients for telling local stories that connect to a broad audience.

1. Here's what we did.

Can you paint a picture of the event, with specifics? Did you team up with anyone to make it happen?

Example: We recently held a healthy cooking demonstration at the annual community festival downtown.

Communications and Social Media

2. Here's why we did it.

How does this meet the local community's needs and interests?

Example: Because we all know Pine Township loves their homegrown tomatoes — and we also all want to take care of our health.

3. Here's what participants got out of it.

How did this event connect fun to a purpose? Did they try something new, learn something new, or meet someone new?

Example: Participants learned new techniques for a healthier lifestyle by enjoying a traditional dish, and had fun participating in the preparation.

4. Here's what it says about the retired educators community efforts.

Who are we “for”? How are we connected to the community? What value do we provide?

Example: We're working together with retirees and the community to help people live healthier in a way that's fun and fits into their lifestyle. That's just one part of what you can do with the retired educators in your community.

→ A look at the past:

Look at an example of a successful email that sparked you to take action or one that helped to recruit you into the association.

→ GLOSSARY

Inclusive

Strategic messaging is a value-based communication framework that companies employ in all interactions with stakeholders -- employees, prospects, customers, and investors. Strategic messaging communicates product value to the customer by describing the solution to a problem.

Communications and Social Media

Steps to smart messaging

Create messages and conversations that move volunteers to action. What is strategic messaging?

- The foundation for how you communicate.
- A focus to create conversations that engage people.
- Two-way communication; speak and listen.

Seven steps to strategic messaging

1 State the value of the organization. Always be explicit.

- Here's who we are, what we do and why.
- "We are the voice of the retired educator community, monitoring, protecting and improving the benefits needed to secure dignity, independence and the best quality of life in retirement."

2 Connect authentically; know your audience.

- Be interested and know them inside and out. What do they value? What do they fear?
- Know their frustrations and relate to their challenges.
- "Have you ever had any of these challenges?"

3 Relate to your audience's aspirations and struggles.

- Vulnerability is the new way to connect and engage.
- Share examples of how you've helped retired educators step into new possibilities and/or overcome struggles.

4 Declare your expertise.

- Share your REA's credibility, your strength, your mission, your results and your commitment to all retired school personnel and the larger community.
- Name 3 points that best illustrate your REA's credibility.

5 Demonstrate how times have changed; trends and shifts demand a different response and new actions. Share trends.

- Authentically talk about the challenges and opportunities that all retirees are facing.
- Create a rallying cry for unity and belonging to the community.
- What's shifting in your state or local town?
- What is the conversation that no one seems to be having?

Communications and Social Media

6 Provide solutions; discuss step-by-step the most common mistakes or fears, and how to prevail.

- How do we move forward to ease our frustrations, take advantage of opportunities, create possibilities in our ever-changing world? What do we want for all retired school personnel? What's your claim or promise to members?
- How will membership and volunteering with the REA make retirement more enjoyable?

7 Give them the first action (or the next step) to take.

- What can a potential member or volunteer do right now? Clarify the ways to contribute.
- Address concerns head on and Ask! Ask! Ask!
- What is our call to action?

Social media

Checklist: creating messages & sharing your story

Capturing the attention of younger retirees online requires clear, concise and compelling messages. Social media users are quick consumers of information. The focus should be on providing concise messages with one objective or one call to action. Here are some best practices for developing messages to share on social media:

- ✓ **Think of the role** of the REA as a connector. Connect the audience to important information about retirement, opportunities to give back, how to get involved and participate.
- ✓ **Listen to the audience** and provide proactive responses to their needs when and where it makes sense.
- ✓ **Introduce** the REA unit and share your mission. Consistently remind the audience who you are and the value you provide.
- ✓ **Focus** on the possibilities and opportunities available to retired educators. Message focus should be on what members of the community can achieve or experience.
- ✓ **Use pictures** and feature retired educators. Share photos from recent gatherings, retirees socializing, attending workshops and learning, lobbying at the state legislature, volunteering in the community, etc.
- ✓ **Less is more (the rule of one)**. When working on a message, it's critical to think about the goal. Do you want to share a pertinent piece of information? Increase engagement? Sign-ups? Clicks to site? Pick one focus and stick with it.

Communications and Social Media

- ✓ **Target an ideal audience.** More and more, social media tools allow you to target content to specific audiences. Consider selecting one or more of these filters when writing a post to help ensure it is seen by the local audience it's most relevant to. Facebook offers several tools to help home in on your ideal audience (for example, location, age, gender, retired status, teaching profession, etc.).
- ✓ **Show you are listening.** Social media is a vehicle for conversation, so ask questions of the audience and solicit their feedback about what they'd like to see from the organization. Social networks are a casual and engaging space where people expect you to interact with them and reply. If someone asks a question, don't hesitate to respond!
- ✓ **Use simple, informative language.** Social media is conversational, so type and speak to them in a casual manner, just like you would talk to them in person.
- ✓ **Use video to tell the story.** If a photo is worth a thousand words, a video is worth a million. Use video as often as possible, on as many social media platforms as possible. Across channels, video generates the highest level of audience engagement. It helps you to tell the retired educator community story in a dynamic way, whether the video features community work, promotes upcoming events, or inspires followers to take action on a legislative issue. Ensure your video features diverse members of the community.
- ✓ **Interact with other organizations.** Take advantage of networking opportunities at community events. Introduce yourselves, get to know which channels your new contacts are connected with, and follow them. Point to collaborations on social media by tagging their social media handles if you're participating in something together. Let colleagues, volunteers, and the other community organizations know which hashtags you'll be using for the event so they can include them in their posts (for example, #retiredteachers or #retirededucators). All of these actions have the potential to expand reach, by creating opportunities to re-share content with collaborating organizations and their channels.



The Best 100 Education Hashtags for All Educators on Twitter:
<https://tinyurl.com/topeducationhashtags>

Look it up

- ✓ **Demonstrate inclusiveness and diversity.** Wherever possible, show the diversity of the participants at your events and speak to the range of guests who attend. For example, include language like “people 50-plus and their families,” “you and your friends,” etc. Strive to include and represent multigenerational and diverse audiences in photos when possible and align to your multicultural goals.
- ✓ **Celebrate holidays** across different religions and beliefs and include communities that celebrate special days like the Sabbath, Dia de Los Muerto, Kwanzaa, etc.

Communications and Social Media

Quick tips for creating more effective videos

It's okay (and even encouraged) for the videos you share to look homemade. All you need is a smart phone! Viewers want authentic, relevant stories shared in real time -- not videos that look overproduced.

QUICK TIPS

- Facebook Live can be a great option for sharing content quickly.
- If recording the video with your phone, remember to hold it horizontally!
- Use a tripod or set your phone on a solid surface when recording to prevent any shakiness.
- Short videos (one to two minutes in length) create the most engagement.
- Facebook videos with captions perform even better than those without, so be sure to include a word or two about what's involved.

Leadership Training

This section is a training tool to use with your board of directors, or your volunteer leadership teams. You may print out the pages for participants and ask them to fill out the questions and discussion points. Consider walking through the questions together and discussing your answers and opinions on how best to lead the organization.

What is leadership?

Take a few minutes and ask yourself,
“What ignites my enthusiasm for leading?”
“Which idea or concept resonates best with me?”

Grab a pen and take a few minutes to answer these questions below.

How do you define leadership?

As you can see, there are many definitions of leadership. Here is one summary that best pulls together the concepts of being an effective leader representing today’s retired educator community: leadership is a process of social influence, which maximizes the efforts of others, towards the achievement of a common and inspiring goal.

What ignites your enthusiasm for leading? What ideas, ideals and concepts resonates with you?

How would you describe your own leadership style? What are your core strengths and characteristics? What do you do really well?

REFLECTION

Who are leaders you admire? 

What traits do these leaders possess that you’d like to emulate?

Leadership Training

When you take a step back from the daily tasks of leading your REA, how would you define or describe your leadership vision for the organization? What is it that you are working towards? What is the future state that you want to create?

Rate yourself as a leader

A critical component of professional development is the ability to track your progress and success over time. Below is an assessment. Take a deep breath, clear your mind, and ask yourself these questions.

Today's date: _____

1. As a leader, do you have a clear personal vision for where you are guiding the organization? (Circle one:)

YES NO AT TIMES, BUT NOT ALWAYS CONSISTENT

2. If yes, what is your vision? _____

3. If no, why not? Or if not consistent, why not? _____

4. On a scale from 0-10, 0 being the lowest, 10 being the highest, how would you rank yourself as an effective leader?

0 1 2 3 4 5 6 7 8 9 10

5. Why did you give yourself that score? What do you do well? What could you do better?

6. On a scale from 0-10, 0 being the lowest, 10 being the highest, how would you rank yourself as an effective communicator?

0 1 2 3 4 5 6 7 8 9 10

7. Why did you give yourself that score? What do you do well? What could you do better?

8. What are the core characteristics and values that drive you as a leader? How can you actively share them with your leadership teams, volunteers and members?

Leadership Training

How to be an effective leader

An effective leader models the behavior he/she most wants to see. When a leader wants to change a situation, he/she can set the tone and make the change. Others will follow.

What behavior do you most want to see in others? And in what ways can you better live these qualities to inspire those around you?

Discernment not judgment

To discern means to observe information and then draw conclusions based on that information that is focused on the greater good. Discernment is when an individual is able to understand what is occurring or what he/she observes without having to judge the other parties.

To judge is to compare, diminish, make wrong or feel better than. People judge because they're threatened in some way; and therefore, judging is not an effective leadership component. Compassion and empathy are important components, as they help the leader keep the observation in discernment mode rather than being judgmental.

Are there any situations in your current leadership position where you may be judging another (comparing yourself to them, diminishing them, making them wrong or yourself right)?

How is this impacting your relationship with this person? How is it impacting the organization?

REFLECTION

Who comes to mind when you think of an effective communicator? Why that person, what sets them apart?

Leadership Training

How can you start to shift from judgment to discernment – see the information and draw conclusions that support the greater good? What actions can you take? How can you shift your thinking or acting?

Leaders influence rather than control. We tend to “control” others or situations because we’re afraid of what might happen if we don’t.

We influence others by being a model, not by forcing others to do things our way or to look at life our way. Leaders may not be able to control another’s behavior or the relationship, but they can influence the relationship via requests, the nature of their conversations, and how well they walk the talk. When leaders advise others out of fear, they are attempting to control.

When leaders create with their audience what they most want, they are most likely influencing.

Where might you be trying to control another person’s behavior? How can you shift your grip to better influence and inspire?

Leaders are patient, not passive. Timing is important for leaders; sometimes they need to bide time and exude patience with members and volunteers. Being passive comes from fear or complacency. Patience includes asking for what you want the member/volunteer to do and demonstrating patience when they don’t deliver immediately.

Is there any area of your work where you are being impatient? How can you balance the need to ask for what you want and be patient ... without being passive?

Leaders respond immediately instead of waiting to buffer the reaction. A leader who is present can respond immediately to what’s occurring in any situation, and address it head on. What is your current response time to requests? Do you need to speed up your response time (i.e., returning phone calls and emails within 24 hours, blocking time each day to respond?).

Leadership Training

Is there anyone waiting on a response from you, right now? How (and when) will you address their needs?

Wise leaders know what to overlook, they know when and how to let minor things go and focus on the big picture. This saves energy and eliminates drama, stress, anxiety and frustration. Leaders discern and know which battles to pick and which to let go.

Are there any battles that you need to let go of or resolve in a different manner? Are there any minor distractions that are keeping you from being an effective leader, and how will you eliminate them?

Effective leaders have a method or system for cleaning up messes. We are not perfect and we need to give ourselves permission to make mistakes. However, effective leaders generate awareness for their missteps and have a way to clean up incompleteness and broken agreements.

Are there any messes, broken agreements or incomplete actions that you need to clean up? What action will you take, by when?

How to be an effective communicator

A critical and learned skill for all leaders is being an effective communicator. At the core of your mission is the challenge of activating the hearts and minds of your volunteers and members and learning how to capture attention knowing that your audience is most likely distracted by other conversations and messages.

Effective communication starts with presence, engaging people (one-to-one or one-to-many) on a whole different level.

Effective communication means being with the person (or persons) to whom you are communicating.

Being with a member or volunteer is more than listening, responding, understanding and showing that you care; it's really being available (mind, heart and soul).

This invisible component of personal interaction helps connect and engage people. Also, when you share from the heart (e.g., sharing the "why" you volunteer and serve), both sides have an instant experience of being related.

Leadership Training

As a leader, ask yourself:

- Do I really listen in conversations? Am I focused and hearing what the person is saying? Or is my mind racing or working through what I want to say next?
- Do I have the capacity to just “be” with people? Or am I so worried about how I look, how I come across, or how they are going to react to me?
- Do I have the courage to share from the heart? Or am I too worried about getting “my talking points” across? How comfortable am I in speaking from my heart when it comes to serving members and volunteers for the greater good?

How to approach difficult conversations

As a leader of an organization representing a large group of people, you are bound to face challenges in your conversations. We sometimes avoid difficult conversations because:

- We do not want to feel guilty.
- We do not want to disappoint others because we know how bad it feels.
- We want to look good and avoid looking bad.
- We do not have the language to let someone down with grace and professionalism.

Here are some key principles to successfully navigating difficult conversations:

- Identify the reality, the truth of the situation.
- Be real, not right.
- Use “I” and “we”; “you” elicits defensiveness.
- Reinforce the person’s value to you and the organization.
- Ask: “What do you think?” Be fully present for their response.
- Repeat back to them what you heard.
- Speak your truth with grace and professionalism in a clear and decisive way.

Handling difficult conversations or confrontations begins with stepping back and viewing the bigger picture, addressing the situation head on, allowing emotions and personalities to emerge and then moving to real solutions.

It is critical to remove oneself from the confrontation, empathize with the parties involved, quickly eliminate the charge, navigate the situation and move from emotion to solution. Each step is focused on the greater mission of the organization.

A handy format for navigating difficult conversations includes:

What’s Up?

Ask questions to confirm understanding.

What’s So?

Leadership Training

Identify the pressing issue and agree on the facts.

Examine your personal contribution to the issue as well as value the other person brings.

What's possible?

Create possibilities for action.

What is the ideal outcome or result you both want?

Let's go!

Confirm the action plan and next steps. Commit to action for the greater good.

- Effective communication also includes the act of clarifying, which means repeating or rephrasing to the best of your ability what the other person has just communicated to you.
- It demands keen listening, presence and the ability to empathize.
- Effective communication results in greater connection and engagement. Think about your own experiences and the difference between a conversation where the other person just “didn’t get” what you were saying, and one where the other person completely “got” and understood you.
- Practice using these prompts to help you clarify, summarize and repeat back what another person has shared with you: “So what I hear you saying is ...” or “Let me make sure I understand you correctly ...”

How to handle challenging situations

First and foremost, TRUST yourself! You have the knowledge, the wisdom and the diplomacy to handle the most challenging situations. Reflect back on your years as a teacher, an administrator, a professional ... even as a parent!

It's a natural human reaction for hearts to start racing and palms to start sweating when we think about tackling a difficult situation – whether it's a disgruntled volunteer, an irate member on the phone, or a challenging discussion with one of your leaders.

Know that you have what you need to succeed, and these tools and strategies will help keep you centered and grounded, and coming from a good place that focuses on what's best for the entire organization.

Think back to your experience as a leader or as a professional and remember a significant challenge you faced. What were the qualities that helped you address the challenge and move through the situation? What did you do very well in this situation? How did your skills, knowledge and wisdom impact the outcome? What can you take forward for future challenges?

Leadership Training

How to handle difficult personalities

An important strategy for dealing with difficult people is to seek first to understand, and then to be understood.

Begin with probing questions or statements, including “Tell me more, why do you feel that way, and can you give me an example?”

For example, you are in a conversation with a volunteer who states, “This is a stupid idea and it will never work.”

You respond (not react) by calmly stating, “I hear your concern. Tell me more about why you feel that way.”

They respond, “Because of _____.”

You respond again, “Tell me more; how _____ will impact our situation? What is the impact to the organization, and to you?”

Keep listening to their response and keep responding with “Tell me more,” until you get to the base of their objection.

The driving human emotion behind every conflict or difficult situation is usually fear.

As a leader, look at fear in a new perspective. The difficult individual that you are working with is really experiencing FEAR: “false evidence appearing real.”

Conflict management theory says that all objections come from a place of feeling unfulfilled (the person objecting has a hole inside that he/she needs to fill.) If you can get to the main concern and respond to that adequately, then you can have a meaningful conversation.

There are also times when people just do not want to get on board, and that is when you look to see if they maybe are no longer a good fit for the organization.

Embrace change

1. Behavior change is a process; as is breaking patterns or habits. Leaders can shift their own behavior by generating the awareness, being clear on the outcome and vision, clearing the decks of distractions, implementing a work and reporting structure, and generating fun.

It’s important to add humor and ease to the process and know that we do the best we can in any situation. (Eliminate the need for self-criticism or judgment.)

2. Behavior change also relies on conditioning. As a process, behavior change happens over time. You plant the seed or new behavior, try it on over time and be open and willing to manage through resistance and adapt to the new change. Practice and persistence are key.

Leadership Training

When people don't want to change

How people act, the choices they make and actions they take, their motivations or lack thereof, are directly correlated to how they view the world — or to say it another way, to how the situation occurs to them. This context shapes people's actions and performance. Defining roles, how you relate to each other and each individual's contribution only occurs within those parameters.

Embracing change demands shifting the context by which people view the situation. Use your association's mission, vision and values to set the context: this is who we are, why we are here and why this change supports our mission.

Help your volunteers see themselves as an integral, vital part of the organization's future. Ask them to step outside their separate roles and experience themselves as part of a team. Few forces are as powerful in elevating an organization's performance as a mission and vision shared and owned at every level. When people take on your mission, vision and values as their own, it becomes the driving force of the organization, where you can create new possibilities.

The change process

Change is a constant in life, and a constant for organizations. It is important to understand that human responses to change are natural and should not be taken personally.

One way to look at an individual's response to change is to reflect on the various stages of the "change process:"



Leadership Training

Exploration

“Could this work for me?”

“Let’s try this on!”

Hope

“I can see how this can work for me.”

“We are all committed as one organization and are in service to our members.”

Commitment

“This works for me and my colleagues.”

“Celebrate success!”

How to respond to, “But this is how we’ve always done it!”

Respond to “This is how we’ve always done it” with “Great, what about the way we have always done it has worked well for you, for the organization? What don’t you want to lose or change? If we could keep things the same, but make some tweaks, what tweaks would you suggest and why?”

Focus again on the organizational mission, vision and goals and how this change helps you fulfill your agenda. This is not personal, it is about the greater good for the organization and your members.

How to provide clear direction:

- 1.** Remember, change’s best ally is an infusion of clarity.
- 2.** Eliminate ambiguity where you can because being unclear is overwhelming to individuals. It also feeds misinformation, gossip and rumors.
- 3.** Reposition the context of the situation to reflect the greater good, be clear on what the changes are and what they will bring.
- 4.** Make what is expected of your members and leaders crystal clear, put the change in reach by outlining specific actions, expectations, roles, responsibilities and a time frame for action.
- 5.** Provide clear direction so that people start imagining how the change could work rather than getting mired in over-analysis and debate about whether change should happen or not.
- 6.** Go down the path by helping people feel that change is desirable and that they are capable of making the change.

Additional AARP Resources

Non-Profit/Government resources

NRTA Executive Coaching Program Summary 2012-2013, Lessons Learned and Insights Gained

Other resources

List of retired educator associations websites

Below is the network of state Retired Educators Associations (REAs) that represent and support retired educators across the country. **Connect with each REA by clicking on the states below:**

[Alabama](#)

[Alaska](#)

[Arizona](#)

[Arkansas](#)

[California](#)

[Colorado](#)

[Connecticut](#)

[Delaware](#)

[District of Columbia](#)

4502 Stecoah Dr.

Clinton, MD 20735

301-825-4002

[Florida](#)

[Georgia](#)

[Hawaii](#)

[Idaho](#)

[Illinois](#)

[Indiana](#)

[Iowa](#)

[Kansas](#)

[Kentucky](#)

[Louisiana](#)

[Maine](#)

[Maryland](#)

[Massachusetts](#)

[Michigan](#)

[Minnesota](#)

[Mississippi](#)

[Missouri](#)

[Montana](#)

[Nebraska](#)

[Nevada](#)

[New Hampshire](#)

[New Jersey](#)

[New Mexico](#)

[New York](#)

[North Carolina](#)

[North Dakota](#)

[Ohio](#)

[Oklahoma](#)

[Oregon](#)

[Pennsylvania](#)

[Rhode Island](#)

[South Carolina](#)

[South Dakota](#)

[Tennessee](#)

[Texas](#)

[Utah](#)

[Vermont](#)

[Virginia](#)

[Washington](#)

[West Virginia](#)

[Wisconsin](#)

[Wyoming](#)

Additional AARP Resources

ALABAMA OFFICE

201 Monroe Street, #1880
Montgomery, AL 36104
866-542-8167 (main); 334-954-3050 (fax)

ALASKA OFFICE

3601 C Street, #1420
Anchorage, AK 99503
866-227-7447 (main); 907-341-2270 (fax)

ARIZONA OFFICE

16165 N. 83rd Avenue, Suite 201
Peoria, AZ 85382
866-389-5649 (main); 602-256-2928 (fax)

ARKANSAS OFFICE

1701 Centerview Drive, #205
Little Rock, AR 72211
866-554-5379 (main); 501-227-7710 (fax)

CALIFORNIA OFFICE – PASADENA (CA02)

200 S. Los Robles Avenue, #400
Pasadena, CA 91101
866-448-3615 (main); 626-583-8500 (fax)

CALIFORNIA OFFICE – SACRAMENTO (CA06)

1415 L Street, #960
Sacramento, CA 95814
866-448-3614 (main); 916-446-2223 (fax)

CALIFORNIA OFFICE – SAN JOSE (CA16)

WeWork (temporary location)
75 East Santa Clara Street, #06139
San Jose, CA 95113

COLORADO OFFICE

303 E. 17th Avenue, # 510
Denver, CO 80203
866-554-5376 (main); 303-764-5999 (fax)

CONNECTICUT OFFICE

21 Oak Street, #104
Hartford, CT 06106
866-295-7279 (main); 860-249-7707 (fax)

Additional AARP Resources

DELAWARE OFFICE

1100 N. Market Street, #1201
Wilmington, DE 19801
866-227-7441 (main); 302-571-1984 (fax)

DISTRICT OF COLUMBIA OFFICE

100 M Street SE, Suite 650
Washington, DC 20003
202-434-7700 (main); 202-434-7710 (fax)

FLORIDA OFFICE – ST. PETERSBURG (FL15)

360 N. Central Avenue, Suite 1750 St.
Petersburg, FL 33701
866-595-7678 (main)

FLORIDA OFFICE – DORAL (FL09)

3750 NW 87th Avenue, #650
Doral, FL 33178
786-804-4506 (main); 786-804-4544 (fax)

FLORIDA OFFICE – TALLAHASSEE (FL18)

200 West College Avenue, #304
Tallahassee, FL 32301
866-595-7678 (main); 850-222-8968 (fax)

GEORGIA OFFICE

999 Peachtree Street, NE, #1110
Atlanta, GA 30309
866-295-7281 (main); 404-881-6997 (fax)

HAWAII OFFICE

1132 Bishop Street, #1920
Honolulu, HI 96813
866-295-7282 (main); 808-537-2288 (fax)

IDAHO OFFICE

250 S. 5th Street, #800
Boise, ID 83702
866-295-7284 (main); 208-288-4424 (fax)

ILLINOIS OFFICE – CHICAGO (IL02)

222 N. LaSalle Street, #710
Chicago, IL 60601
866-448-3613 (main); 312-372-2204 (fax)

Additional AARP Resources

ILLINOIS OFFICE – SPRINGFIELD (IL07)

300 W. Edwards Street, 3rd Floor
Springfield, IL 62708
866-448-3617 (main); 217-522-7796 (fax)

INDIANA OFFICE

One N. Capitol Avenue, #1275
Indianapolis, IN 46204
866-448-3618 (main); 317-423-2211 (fax)

IOWA OFFICE

600 E. Court Avenue, #100
Des Moines, IA 50309
866-554-5378 (main); 515-244-7767 (fax)

KANSAS OFFICE

6220 SW 29th Street, Suite 300
Topeka, KS 66614
866-448-3619 (main); 785-232-8259 (fax)

KENTUCKY OFFICE

10401 Linn Station Road, #121
Louisville, KY 40223
866-295-7275 (main); 502-394-9918 (fax)

LOUISIANA OFFICE

301 Main Street, #1012
Baton Rouge, LA 70825
866-448-3620 (main); 225-387-3400 (fax)

LOUISIANA Community Resource Center (LA04)

3502 S. Carrollton Avenue, Unit C
New Orleans, LA 70118
504-485-2164 (main); 504-485-2173 (fax)

MAINE OFFICE

53 Baxter Boulevard, Suite 202
Portland, ME 04101
866-554-5380 (main); 207-775-5727 (fax)

MARYLAND OFFICE

200 St. Paul Place, # 2510
Baltimore, MD 21202
866-542-8163 (main); 410-895-0269 (fax)

Additional AARP Resources

MASSACHUSETTS OFFICE

One Beacon Street, #2301
Boston, MA 02108
866-448-3621 (main); 617-723-4224 (fax)

MICHIGAN OFFICE

309 N. Washington Square, #110
Lansing, MI 48933
866-227-7448 (main); 517-482-2794 (fax)

MINNESOTA OFFICE

30 E. 7th Street, #1200
St. Paul, MN 55101
866-554-5381 (main); 651-221-2636 (fax)

MISSISSIPPI OFFICE

141 Township Avenue, #302
Ridgeland, MS 39157
866-554-5382 (main); 601-898-5429 (fax)

MISSOURI OFFICE

9200 Ward Parkway, #350
Kansas City, MO 64114
866-389-5627 (main); 816-561-3107 (fax)

MONTANA OFFICE

30 West 14th Street, #301
Helena, MT 59601
866-295-7278 (main); 406-441-2225 (fax)

NEBRASKA OFFICE

301 S. 13th Street, # 201
Lincoln, NE 68508
866-389-5651 (main); 402-323-6913 (fax)

NEVADA OFFICE

5820 S. Eastern Avenue, #190
Las Vegas, NV 89119
866-389-5652 (main); 702-938-3225 (fax)

NEW HAMPSHIRE OFFICE

45 South Main Street, Suite 202
Concord, NH 03301
866-542-8168 (main); 603-224-6212 (fax)

Additional AARP Resources

NEW JERSEY OFFICE

303 George Street, Suite 505
New Brunswick, NJ 08901
732-509-2093 (main); 732-509-2151 (fax)

NEW MEXICO OFFICE

535 Cerrillos Road, #A
Santa Fe, NM 87501
866-389-5636 (main); 505-820-2889 (fax)

NEW YORK OFFICE - NEW YORK CITY (NY08)

750 Third Avenue, 31st Floor
New York, NY 10017
866-227-7442 (main); (212) 644-6390 (fax)

NEW YORK OFFICE - ALBANY (NY01)

One Commerce Plaza, #706
Albany, NY 12260
866-542-8166 (main); 518-434-6949 (fax)

NEW YORK OFFICE - ROCHESTER (NY09)

c/o Monroe Community Hospital
435 E. Henrietta Road Rochester, NY 14620
585-760-5451 (main); 585-760-5456 (fax)

NORTH CAROLINA OFFICE

5511 Capital Center Drive, Suite 400
Raleigh, NC 27606
1-866-389-5650 (main) 919-755-9684 (fax)

NORTH DAKOTA OFFICE

107 W. Main Avenue, #125
Bismarck, ND 58501
866-554-5388 (main); 701-221-2242 (fax)

OHIO OFFICE

17 S. High Street, #800
Columbus, OH 43215
866-389-5653 (main); 614-224-9801 (fax)

OKLAHOMA OFFICE

126 N. Bryant Avenue
Edmond, OK 73034
866-295-7277 (main); 405-844-7772 (fax)

Additional AARP Resources

OREGON OFFICE

9200 SE Sunnybrook Blvd., # 410
Clackamas, OR 97015
866-554-5360 (main); 503-652-9933 (fax)

PENNSYLVANIA OFFICE – HARRISBURG (PA03)

30 North 3rd Street, #920
Harrisburg, PA 17101
866-389-5654 (main); 717-236-4078 (fax)

PENNSYLVANIA OFFICE – PHILADELPHIA (PA06)

1650 Market Street, #675
Philadelphia, PA 19103
866-389-5654 (main); 215-665-8529 (fax)

RHODE ISLAND OFFICE

10 Orms Street, #200
Providence, RI 02904
866-542-8170 (main); 401-272-0896 (fax)

SOUTH CAROLINA OFFICE

1201 Main Street, #1720
Columbia, SC 29201
866-389-5655 (main); 803-251-4379 (fax)

SOUTH DAKOTA OFFICE

5101 S. Nevada Avenue, #150
Sioux Falls, SD 57108
866-542-8172 (main); 605-361-2323 (fax)

TENNESSEE OFFICE

150 Fourth Avenue North, Suite 135
Nashville, TN 37219
866-295-7274 (main); 615-313-8414 (fax)

TEXAS OFFICE - AUSTIN (TX01)

1905 Aldrich St, Suite 210
Austin, TX 78723
866-227-7443 (main); 512-480-9799 (fax)

TEXAS OFFICE – DALLAS (TX04)

8140 Walnut Hill Lane, #108
Dallas, TX 75231
866-554-5377 (main); 214-265-4061 (fax)

Additional AARP Resources

TEXAS OFFICE - HOUSTON (TX14)

2323 S. Shepherd, #1100
Houston, TX 77019
866-227-7443 (main); 832-325-2213 (fax)

UTAH OFFICE

6975 Union Park Center, #320
Midvale, UT 84047
866-448-3616 (main); 801-561-2209 (fax)

VERMONT OFFICE

199 Main Street, Suite 225
Burlington, VT 05401
866-227-7451 (main); 802-651-9805 (fax)

VIRGINIA OFFICE

707 E. Main Street, #910
Richmond, VA 23219
866-542-8164 (main); 804-819-1923 (fax)

WASHINGTON OFFICE

18000 International Blvd., Suite 1020
SeaTac, WA 98188
866-277-7457 (main); 206-517-9350 (fax)

WEST VIRGINIA OFFICE

300 Summers Street, #400
Charleston, WV 25301
866-227-7458 (main); 304-344-4633 (fax)

WISCONSIN OFFICE

222 W. Washington Avenue, #600
Madison, WI 53703
866-448-3611 (main); 608-251-7612 (fax)

WYOMING OFFICE

2020 Carey Avenue, Mezzanine Level
Cheyenne, WY 82001
866-633-3290 (main); 307-634-3808 (fax)

Additional NRTA/AARP Resources

Medicare Special Report ([Click Here](#))

Visit this AARP website for a full range of information on potential changes to Medicare, a program that is important to many retired educators.

Caregiving Resource Center ([Click Here](#))

Visit this AARP website for a wealth of information on the myriad issues facing caregivers – from finding healthcare providers to calculating costs to connecting with experts.

Create the Good ([Click Here](#))

This AARP website offers valuable resources for your community service programs. Here you will find service opportunities, tools to start a project, get volunteers and stay inspired.

Fraud Watch Network ([Click Here](#))

AARP's Fraud Watch Network offers information about protecting you and your family from fraud. Watchdog Alerts provide timely information on con artists' latest tricks, along with information on what to do if you have been scammed.

Online Survey Tool

NRTA has a subscription to Survey Monkey, an online survey tool for REAs interested in creating a member or meeting survey. We also can provide sample surveys that other states have utilized. Please contact the NRTA office for more information on this service.

Conclusion

The NRTA team is here to serve you and your volunteer leadership teams. Please use and share the resources included in this manual. And feel free to contact us, should you need further information or ideas to grow membership, mobilize legislative advocates, engage volunteers and better tell your REA's story.

NRTA Contact Information

NRTA: AARP's Educator Community

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888-687-2277