

# Sample MB Annual Organizing Activities



Membership promotion begins at the grassroots level with the local chapter. This includes the one-on-one contact with potential or new members and keeping current members informed about all of the CTA and NEA Member Benefit options available to them.

We understand the continuing demands on your time as chapter leaders. Therefore, we have formulated some suggested organizing tips to give you some ideas for your own organizing activities.

June, 2018

# Fall



- ✿ Order new Member Benefit brochures (revised annually) at [CTAMemberBenefits.org](http://CTAMemberBenefits.org). At a minimum, order the Member Benefits Highlights for all members. Also, order materials from NEA Member Benefits, contact Sean Mabey at [smabey@neamb.com](mailto:smabey@neamb.com).
- ✿ Order and post Member Benefits posters for members to see. One features Member Benefits and others feature the new CTA Retirement Savings Plan.
- ✿ For your new members this year, request a listing of new members and create new member packets. You can tailor the information to meet their needs. Order the Member Benefits Folder and insert your relevant items: Collective Bargaining Agreement, membership form Member Benefits publications, and a letter from the local President.
- ✿ When meeting with your members, take the opportunity to share one of the CTA Member Benefits videos – each only about six minutes long and give an overview of the Member Benefits programs.
- ✿ Highlight the enrollment opportunity for Voluntary Life and/or Disability insurance through The Standard for newly hired CTA members. This can be done via E-news, website, posted flyer, bulletin board, or inserted in mailboxes. Try to promote on-line enrollment.
- ✿ If you have a Flex Plan (Section 125), warn members about providers who may try to steer them during Open Enrollment toward a product not endorsed by CTA. A sample communication piece can be found at [www.CTAMemberBenefits.org/leaders](http://www.CTAMemberBenefits.org/leaders).
- ✿ Stay current by viewing information on the CTA Member Benefit and NEA Member Benefit websites. Also, update your chapter website with the appropriate links: [www.CTAMemberBenefits.org](http://www.CTAMemberBenefits.org), [www.CTAinvest.org](http://www.CTAinvest.org), [www.CTAretirementplan.org](http://www.CTAretirementplan.org), and [www.neamb.com](http://www.neamb.com).

# Fall



- 🍁 Something to consider: can you do something with CTA/NEA Member Benefits to assist in your Fall Campaign activities?
- 🍁 During your district orientation for new hires, coordinate with them to be on the beginning or the end of the agenda. Consider providing food and/or drinks, inviting CTA-endorsed vendors, providing a packet of new Member Benefit brochures, and conducting drawings and giving away prizes.
- 🍁 Plan a Back-to-School Event. This can also be a survival party for membership training, a review of your contract, a benefits review and to meet CTA-endorsed vendors and site reps. Provide snacks and/or light dinner (talk to vendors about possibly hosting). This event can be a pizza party, ice cream social, breakfast, BBQ, or maybe a picnic. Offer prizes and drawings.
- 🍁 Make sure the eligible members are signed up for the Extended Medical Arts Endorsement coverage.
- 🍁 Many new educators are dealing with student loans. Do they know about student loan forgiveness available through the US Department of Education? Organize a “Generation Debt: Student Loan Forgiveness” presentation. There are also resources at [www.CTAMemberBenefits.org](http://www.CTAMemberBenefits.org), including a flyer about the loan forgiveness and cancellation programs.
- 🍁 Research your 403(b) plan provisions and vendor selection – determine if satisfactory to membership.
- 🍁 Promote and give yourself a “retirement pay raise” by opening a 403(b) account before you or others get that first paycheck of the school year.

# Fall



- ❁ Encourage members to visit NEA Member Benefit's Click & Save where they can save online at hundreds of stores.
- ❁ If the CTA Retirement Savings Plan is included on your employer's listing of approved 403(b) plans, request a training from the Member Benefits Department to share information about this unique program.
- ❁ For Back-to-School, you can promote the great Access to Savings available to members. You can find information at [www.CTAMemberBenefits.org/access](http://www.CTAMemberBenefits.org/access) and a flyer to share with your members at [www.CTAMemberBenefits.org/leaders](http://www.CTAMemberBenefits.org/leaders).
- ❁ Order a supply of the new Leader Pocket Guide for your leaders, including your site representatives. This will help them to discuss Member Benefits, find contact information, and get ideas for engaging members with Member Benefits.
- ❁ September is Life Insurance Awareness Month. Promote CTA-endorsed Voluntary and employer-paid Life insurance through The Standard. Also, encourage members to name a beneficiary for CTA's D&D & NEA Member Benefit's Complimentary Life.

# Winter



- Make sure you are keeping up on your website – does your Member Benefits corner need to be refreshed? Do you have any new info to spotlight?
- The new-hire enrollment opportunity for Life and/or Disability is ending soon. Consider distributing another E-newsletter article, place within Member Benefits “spotlight” on website, or maybe place on bulletin board in lounge.
- Promote the automatic CTA Death and Dismemberment Plan along with the NEA Complimentary Life – you can stress the importance of updating or designating a beneficiary (remember this can be accomplished online).
- Sign-up to receive monthly articles from CTA Member Benefits about timely topics to share with your members. Go to [www.CTAMemberBenefits.org/signup](http://www.CTAMemberBenefits.org/signup).
- With the holidays over and bills due, many members may have over-extended themselves financially. Consider organizing an NEA Member Benefits “More Month Than Money: Setting and Living Within a Budget” presentation.
- Provide a monthly or quarterly social/happy hour event to excite and engage members. Can a Member Benefits component be added, short presentation by an endorsed vendor, hand out Highlights brochures, etc.

# Winter



- Check out [www.CTAMemberBenefits.org/access](http://www.CTAMemberBenefits.org/access) and share the exciting news with your members just in time for holiday shopping. You can find a flier at [www.CTAMemberBenefits.org/leaders](http://www.CTAMemberBenefits.org/leaders).
- Share an article or information on The Standard's Family Status Change enrollment opportunity.
- Put together a Q&A of commonly asked questions you receive throughout the year. Consider placing on your website or a flyer for distribution.
- Consider hosting a CTA 403(b)/457 presentation or another CTA or NEA Member Benefits training. See a listing of the available trainings at [www.CTAMemberBenefits.org/trainings](http://www.CTAMemberBenefits.org/trainings).
- At the end of the year, members may be looking at their finances. They may be interested in hearing about CTA and NEA Member Benefits financial products – with competitive rates - through Provident Credit Union and the CTA Credit Card Program.
- Traveling during the holidays? Take advantage of the car rental programs through both CTA and NEA Member Benefits. Also, book your hotel stays at Red Roof Inn, and save 20%. Visit the Travel discounts at CTA's Access to Savings and NEA's Click & Save to find programs.
- Hate shopping? Don't know what to buy your Great Aunt Bertha, get a magazine subscription through NEA Member Benefits.
- Make a New Year's Resolution: review and update all of your beneficiaries.

# Spring



- ✦ Travel, entertainment, amusement park and movie theater discounts are available through both CTA and NEA Member Benefits. Check them out at [www.CTAMemberBenefits.org/Access](http://www.CTAMemberBenefits.org/Access) and [www.neamb.com/clickandsave](http://www.neamb.com/clickandsave).
- ✦ Home loans, home refinancing, and other financial needs are available through Provident Credit Union.
- ✦ Feature a California Casualty auto and home insurance article in your chapter newsletter. Encourage members to get a free quote – can members save money and/or are they adequately insured? Find recent articles at [www.CTAMemberBenefits.org/articles](http://www.CTAMemberBenefits.org/articles).
- ✦ Want to go somewhere fun for Spring Break or Summer Vacation? Check out travel discounts at CTA and NEA Member Benefits, especially CTA's Access to Discounts.
- ✦ Promote our helpful calculators via The Standard at [CTAMemberBenefits.org/TheStandard](http://CTAMemberBenefits.org/TheStandard) or [CTAinvest.org](http://CTAinvest.org). These are helpful tools for members to make sure they are adequately protected.
- ✦ Many members are preparing for retirement. Hold a pre-retirement seminar and promote retired membership, NEA Retiree Health, Long Term Care, and CTA VSP Discount for retirees.
- ✦ April showers bring May flowers...remember [1800flowers.com](http://1800flowers.com).

# Spring



- ✦ Promote the value of participating in a CTA and NEA endorsed programs.
- ✦ Before school ends, identify members in your local chapter to attend the Member Benefits strand at the CTA Summer Institute at UCLA.
- ✦ Were you able to fit in one of the many CTA/NEA Member Benefits trainings for your members? Is there an opportunity to do so?
- ✦ Is everyone aware of Provident Credit Union's Super Reward Checking that earns dividends? This free account requires no minimum balance, no monthly fee, and has free overdraft protection.
- ✦ Many CTA members have children looking at college costs, did you know NEA Member Benefits has a student loan program?

# Summer



- Start planning your summer vacation by taking advantage of discounts through CTA Access to Savings Program, NEA Member Benefit's Click & Save, Trafalgar, G Adventures discounts, and our numerous car rental discounts.
- Hold a Site Rep training prior to the start of the school year. Consider inviting CTA-endorsed vendors, a Group Legal Services attorney, and offering drawings and prizes.
- Talk to your site reps about their responsibilities and work with them on communicating to members – make sure 1:1 contact with any new hires is established.
- Were you able to identify members in your local chapter to attend the Member Benefits strand at the CTA Summer Institute at UCLA?
- Summer would be a good time for your members to become more astute investors and review their progress toward a comfortable retirement. Refer them to [www.CTAinvest.org](http://www.CTAinvest.org) for financial and investment education information, videos and calculators. Also they can find information on the CTA Retirement Savings Plan at [www.CTAretirementplan.org](http://www.CTAretirementplan.org) and/or download a guide at [www.CTAMemberBenefits.org/download](http://www.CTAMemberBenefits.org/download).
- Look into NEA Member Benefit's ID Theft Protection Program.

# Summer



- Discuss with The Standard what month might be best to conduct a Life and Disability Chapter Campaign.
- Consider placing a “spotlight corner” in your Chapter newsletter or on your website. Think of something catchy: The Buzz. Find articles at [CTAMemberBenefits.org/articles](http://CTAMemberBenefits.org/articles).
- Develop a one-on-one relationship with your local CTA-endorsed vendor representatives (The Standard and California Casualty) and invite them to speak at your monthly Rep Council meetings (maybe they can donate a door prize).
- Invite your CTA-endorsed vendor representatives to the meetings you would like them to attend in the Fall.
- Have a follow-up meeting to discuss your member engagement activities for the year – what can be improved upon next year? What do the members want next year? How can Member Benefits be incorporated?
- Were you able to fit in one of the many CTA/NEA Member Benefits trainings for your members? We’re you able to show any videos? If not, maybe schedule for next year?