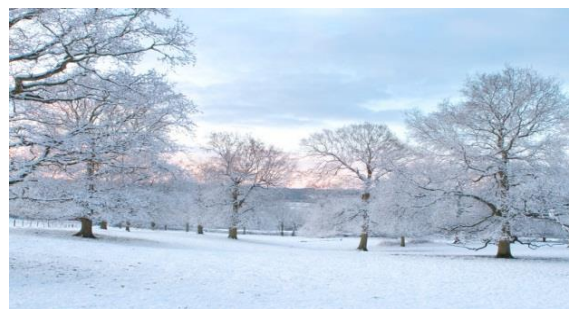


CTA/NEA MB Leader Engagement Calendar 2021-2022



Leaders play an important role in membership engagement and retention, helping members feel connected to our powerful voice for students and public education in California.

When engaging members with CTA/NEA Member Benefits, take advantage of free online and virtual resources available at: CTAMemberBenefits.org/leaders, NEAMB.com/start, and order/download the **CTA Member Benefits Highlights Brochure**, updated annually. Member Benefits staff are eager to support you with trainings, webinars, tips, and other assistance. Reach us at MemberBenefits@cta.org or (650) 552-5200.

We understand the continuing demands on your time, so we have formulated this engagement calendar to give you ideas for including Member Benefits in your own activities. ★ *Tip: These programs can be promoted any time of year, but here is a simple way to spread Member Benefits throughout the year!*

Fall



Theme: *Back-To School Welcome!*

Top Tips – Fall

- Promote **CTA Introductory Disability Insurance for Brand New Educators and ESPs** who become CTA members for the first time between 7/1/2021 and 6/30/2022¹
- Inform members of automatic benefits, such as **CTA/NEA Educators Employment Liability (EEL) Insurance**
- Order Member Benefits supplies and update websites & bulletin

Fall is a great time to set the stage and engage members for the coming year!

*Demonstrate the value of membership to **both new members and veterans** with Back-To-School-themed highlights.*

Whether it's saving on school supplies for the classroom, savings at home, or professional liability protection, the beginning of the school year provides many opportunities to share!

Order new publications:

- Download & email or order & share the **Member Benefits Highlights Brochure** (revised annually) with all members. Log-in at ctamemberbenefits.org/forms for the links to download or order CTA Member Benefits publications. Also order materials from NEA Member Benefits by contacting Sean Mabey at smabey@neamb.com.

Spruce up your Bulletin Boards:

- Order (or download) **Member Benefits posters** and other flyers. Highlight Member Benefits and the CTA 403(b) Retirement Savings Plan.
- There are a lot of non-CTA-endorsed vendors promoting their products to educators. Remind members to be on the lookout for CTA- & NEA-endorsement when meeting with benefits providers. The association takes pride in its quality standards and member advocacy.

New Hire Orientations

- AB 119 now makes it easier for the union to request a list of new hires and to participate in new employee orientations. At your orientations this year, create new member packets. Order the **Member Benefits Folder** and insert your relevant items: **1)** collective bargaining agreement, **2)** membership form or online info [CTA.org/join](https://cta.org/join), **3)** *CTA Introductory Disability insurance flyer, **4)** *Member Benefits publications such as **Highlights Brochure** and **New Member Flyer**, **5)** **The Standard's **Member Enrollment Brochure with application for Disability and/or Life insurance**, and **6)** a letter from the local President.
 - ✓ *Member Benefits publications are available for download:*
 - ctamemberbenefits.org/download
 - ✓ *Standard Voluntary Disability & Life insurance²*
 - CTA Introductory Disability insurance flyer: stdrd.co/IntroDI
 - Enrollment Brochure: standard.com/ctaleader
 - Digital New Hire Kit: stdrd.co/digitalkit

- During your new hire orientations, consider inviting CTA staff and CTA-endorsed business partners to present helpful Member Benefits information. We and our endorsed partners are able to support you with **virtual resources and webinars**, as well.

- Let **California Casualty** help with your member engagement and recruitment activities. Consider inviting your local Field Marketing Manager to participate in your back-to-school events, new hire orientations, membership meetings and rep councils – virtually or when everyone is ready, live and in-person. Reach out to Norma Alfaro, California Casualty's Sr. Field Marketing Manager at nalfaro@calcas.com to learn more.

- Sharable Content:**
 - ❖ Newly hired members and district transfers have a special opportunity to apply for CTA-endorsed Voluntary Disability and Life insurance **without answering health questions** when applying within 270 days from starting work. Visit: standard.com/cta/newhire.
 - ❖ **Register** on both the **CTA and NEA Member Benefits websites** to access members-only programs. Members will need their 10-digit CTA Member ID and the contact information entered must match the CTA database to verify membership. For **membership** related issues, contact Membership@cta.org. For **website** username/password resets, contact Websupport@cta.org. For NEA Benefits website issues, contact ask-us@neamb.com.
 - ❖ With **CTA Access to Savings**, members will find savings up to 50% on everyday items such as meals, clothing, car care, travel, entertainment, home, garden and more, including Back-To-School supplies. Visit: ctamemberbenefits.org/access or download the handy flyer with instructions: [CTA Access to Savings Flyer](#).

Member Protections:

- Highlight **CTA Introductory Disability Insurance** through The Standard. **Brand new educators and ESPs** who become members between 7/1/2021 and 6/30/2022 are eligible for 9 months of CTA Introductory Disability insurance **at no cost to them**¹. Disability insurance is particularly beneficial to newer members who have limited sick leave, are often not eligible for State Disability Insurance, and may need a pregnancy leave. Visit: standard.com/cta/newhire
- Put a spotlight on special features of the CTA-endorsed Disability insurance with The Standard. For instance, a **Student Loan Benefit** and **Cancer Benefit** is automatically included! Visit: CTAMemberBenefits.org/disability
- If you have a **Flex Plan (Section125)**, warn members about providers who may try to steer them toward a product not endorsed by CTA during Open Enrollment. More information, joint advisories, and a sample communication piece for leaders can be found at CTAMemberBenefits.org/leaders.

□ Sharable Content:

- ❖ September is *Life Insurance Awareness Month*
CTA/NEA Automatic Member Benefits include both the **CTA Death and Dismemberment Plan** and **NEA Member Benefit Complimentary Life**. Eligible members are automatically enrolled, but are encouraged to name a beneficiary at CTAMemberBenefits.org/dd and NEAmb.com/complife.
- ❖ September is *Life Insurance Awareness Month*
Don't forget about **CTA-endorsed Voluntary Life Insurance** through The Standard. Newly hired members and district transfers have a special opportunity to apply for CTA-endorsed Voluntary Disability and Life insurance **without answering health questions** when applying within 270 days from starting work. Visit: standard.com/cta/newhire.

Make it Fun!

- Plan a **virtual 'Back-to-School' event** with trivia and prizes. Liven-up your member meeting by adding in a Member Benefits overview or connecting CTA-endorsed partners and site reps. We and our endorsed partners are ready to assist with **virtual resources and webinars**, as well.
- Assist members in downloading the **MyDeals** mobile app, a convenient way to search **over 350,000 deals** and save right from your smart phone. With **CTA Access to Savings**, members will find savings up to 50% on everyday things such as food, clothing, car care, travel, entertainment, home and garden and more. Visit: ctamemberbenefits.org/access or download the handy flyer with instructions: CTA Access to Savings Flyer.

Winter



Theme: *Holiday Shopping & Healthy Finances*

Top Tips – Winter

- Warn Members About Non-Endorsed Flex Plan Vendor Requests
- Healthy Finances** with CTA's 403(b) Retirement Savings Plan & Endorsed Credit Union
- Survey** members to connect them to the benefits they're most interested in

Winter is an ideal time to help protect members with information about retirement savings and financial wellness!

*Demonstrate the value of membership with the peace of mind provided by **our union-endorsed partners.***

*Whether it's exclusive rates on mortgage loans, auto loans, and savings accounts or the **CTA 403(b) Retirement Savings Plan** for educators, this time of year is perfect for educating members about all that CTA and NEA have to offer!*

Member Protections:

- Promote the automatic **CTA Death and Dismemberment Plan** and **NEA Complimentary Life**. Stress the importance of updating or designating a **beneficiary** (which can easily be updated online). Make it a New Year's Resolution to review and update all your beneficiaries. Log-in at both CTAMemberBenefits.org/dd and NEAmb.com/complife.

Promoting Healthy Finances:

- Consider hosting a presentation to help your members learn more about retirement!** See a description of this presentation at CTAMemberBenefits.org/trainings or contact our team at team@ctaretirementplan.org.

- ❑ To help members manage their budget during the winter holidays, California Casualty offers a **holiday skip-payment** option for **CTA Auto and Home Insurance** policyholders. Now is a great time to share the value of this partner program. To learn more, visit www.readyforquote.com/cta.
- ❑ Provident Credit Union was established in 1950 to serve the California Teachers Association. With an **exclusive .125% rate discount** on mortgage and auto loans, members can earn more with a **new account bonus**, competitive rates on **savings and term-share certificates**, and a **Super Reward Checking** account that pays a high interest rate. Share the link with members: CTAMemberBenefits.org/creditunion.
- ❑ At the end of the year, members may be looking at how to **maximize their finances**. They may be interested in hearing about CTA and NEA Member Benefits financial products -- with exclusive, competitive rates – such as the **CTA Credit Card Program**.
- ❑ 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. Contact Sean Mabey at smabey@neamb.com.
- ❑ While promoting retirement savings, be sure to **promote retired membership, NEA Retiree Health, NEA Long Term Care**, and the **CTA VSP Discount** for retirees.

Make it Automatic:

- ❑ Sign-up to receive **monthly articles** for leaders to share with members from CTA Member Benefits featuring **timely topics**. Go to CTAMemberBenefits.org/signup.
- ❑ Once you begin to engage your members about Member Benefits, you may begin to hear about what is most important to them. Put together a **Q&A of commonly asked questions** you receive throughout the year. Consider placing the answers on your website, bulletin boards, or a flyer for distribution.
- ❑ Let Member Benefits help you spice up a monthly or quarterly **social/happy hour** virtual event to excite and engage members. Can a Member Benefits component be added to your business meetings? CTA/NEA staff and endorsed business partners are ready to help and support you with new **virtual resources and webinars** – whether you’d like us to attend for 5 minutes or 50 minutes.

☐ Sharable Content:

- ❖ In November, many new members will have had their **grace period ending** for their **student loans** and as a result will be getting their first statement. Encourage members to check out the **NEA Student Debt Navigator powered by Savi** to learn what forgiveness programs they're eligible for and options to lower their payments through an Income Driven Repayment (IDR). Follow-up with Sean at NEA Member Benefits smabey@neamb.com to find out when "**Generation Debt: Student Loan Forgiveness**" trainings are taking place virtually.
- ❖ **The CTA 403(b) Retirement Savings Plan** was created by CTA to benefit its members, giving them a vetted, quality retirement plan with low fees so they can keep more of their savings. The plan provides first-rate mutual funds such as BlackRock and Vanguard and is intended to supplement CalSTRS and CalPERS pension plans. Members can find out more information at: CTAMemberBenefits.org/rsp.

☐ Sharable Content: Make it Fun!

- ❖ Discover **CTA Access to Savings** discounts just in time for **holiday shopping**. Log-in at CTAMemberBenefits.org/access to see great deals. Don't forget to download the [MyDeals app](#) for mobile devices!
- ❖ **Holiday Meal Savings!** Use the popular **CTA Access to Savings Grocery Coupons** to save on family meals during the holidays. CTAMemberBenefits.org/access
- ❖ **Traveling during the holidays?** Take advantage of programs through both CTA and NEA Member Benefits. Whether it is **car rentals, hotel and resort stays, or airfare**, visit the travel pages at **CTA's Access to Savings** and **NEA's travel deals** and share these great deals with your colleagues. CTAMemberBenefits.org/access
- ❖ Hate shopping? Don't know what to buy your Great Aunt Bertha? Don't miss out on your **2 FREE magazine subscriptions** through NEA Member Benefits. Choose from a variety of popular, iconic titles at neamb.com/CTA.

Spring



Theme: *Spring Cleaning, Entertainment, & Travel*

Top Tips –

- Explore **Entertainment & Travel Savings** with Access Discounts & Enterprise
- Exclusive member savings and service with **California Casualty Insurance** for Home, Auto, & Renter's insurance
- Identify & Involve** New Member Leaders to Plan for Next Year!

*Spring is the time when we begin to get back outdoors, make **large purchases**, and start planning for **vacations!***

*Demonstrate the value of membership with quality programs that offer competitive rates, **excellent customer service**, and have been vetted at the highest level with continued union monitoring and advocacy.*

*Whether it's a home or auto purchase or spring and summer break you are planning, our union-endorsed partners are here to help **save you money!***

Spring Cleaning:

- Does your **chapter website** include links to both CTA and NEA Member Benefits pages?
 - ❖ CTA Member Benefits - CTAMemberBenefits.org
 - ❖ NEA Member Benefits - neamb.com/start
 - ❖ CTA Retirement Savings Plan - CTAMemberBenefits.org/rsp
 - ❖ CTA Financial Wellness Center - CTAinvest.org
- Does your "**Member Benefits Corner**" on your newsletter or website need to be refreshed with new content or images? Based on the survey of your membership and what benefits they enjoy most, do you have any new info to spotlight?

- ❑ When meeting with your members, take the opportunity to share a **Member Benefits video** – CTAMemberBenefits.org/Video – and give your members a quick overview of the Member Benefits programs. Consider simply emailing to all your members.

Member Protections:

- ❑ 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. Contact Sean Mabey at smabey@neamb.com. Also, learn more about the **NEA Student Debt Navigator powered by Savi** and use the tool to evaluate what loan forgiveness programs are available through your employment in public education.
- ❑ Also check out **online resources**, including a flyer about the loan forgiveness and cancellation programs at CTAMemberBenefits.org/studentloans.
- ❑ Part of the association’s mission is to help make sure educators are adequately protected. Promote Member Benefits tools, including our **helpful financial calculators** via The Standard at CTAMemberBenefits.org/TheStandard or CTA’s Financial Wellness Center at CTAinvest.org.
- ❑ Many CTA members have children looking at their own college costs. Do your members know NEA Member Benefits has a **student loan program**? As an NEA member, receive special **interest rate discounts** and choose from multiple repayment options and terms with **no origination, application fees, or pre-payment penalties**.

Protecting Spring Purchases:

- ❑ Provident Credit Union was established in 1950 to serve the California Teachers Association. With an **exclusive .125% rate discount** on mortgage and auto loans, members can earn more with a **new account bonus**, competitive rates on **savings and term-share certificates**, and a **Super Reward Checking** account that pays a high interest rate. Visit: CTAMemberBenefits.org/creditunion.
- ❑ **California Casualty** auto, home, and renter’s insurance offers members and their immediate families preferred rates and unique educator-specific benefits. Get a **free quote** to learn if you can save money or review your policy to ensure that you’re adequately covered through current provider. CTAMemberBenefits.org/calcas.
- ❑ **Sharable Content:**
 - ❖ Important deadline for brand new educators and ESPs this school year: if you became a CTA member in the summer/fall and qualified for **CTA-Introductory Disability insurance**¹ - your **coverage is ending soon**. To continue disability coverage, you must apply for CTA-endorsed Voluntary Disability insurance before the end of the 9-month introductory period. Visit standard.com/cta/newhire.

- ❖ Spring reminder for district transfers: Don't miss out on the special enrollment opportunity for CTA-endorsed Voluntary Disability and Life insurance, ending soon. Members **must apply within 270 days** of starting work. Visit standard.com/cta/newhire.

☐ **Sharable Content: Make it Fun!**

- ❖ April showers bring May flowers...remember **CTA Access to Savings** where members can save on flowers, chocolates, gift baskets, and a variety of other deals with over 350,000 participating merchants. Visit ctamemberbenefits.org/access.
- ❖ If you're **spring cleaning** this year... search a variety of popular **Access to Savings** deals. Visit ctamemberbenefits.org/access.
- ❖ Find the right car at the right price with the **NEA Auto Buying Program**. See what others paid, then get your member pricing and head to the dealership for a test drive. Share great savings with members by sharing the link: neamb.com/autobuy.
- ❖ To protect a new or used auto purchase, check out the **CTA Auto Insurance Program** provided by California Casualty CTAMemberBenefits.org/auto
- ❖ When the time is right, travel, entertainment, amusement parks, and movie theater discounts are available through CTA Member Benefits. Explore **CTA Access to Savings** discounts on restaurants (including take-out and delivery), retail shops, travel (including hotels, car rentals & airfare), theme parks (including Disneyland, Universal Studios Hollywood, Legoland & SeaWorld San Diego), and movie tickets. Go to CTAMemberBenefits.org/access or download the **MyDeals app** today!

Identify Leaders:

- ☐ Before school ends, identify members in your local chapter to attend the Member Benefits sessions at the **CTA Summer Institute**. Keep tabs on upcoming conferences at cta.org/conferences.
- ☐ Were you able to fit in one of the many CTA/NEA Member Benefits presentations for your members? **Increase member attendance** at one of your regular business meetings by adding in Member Benefits on the agenda! We are available virtually too!
- ☐ Encouraging fellow educators to join CTA and take advantage of the many member benefits CTA has to offer is easy when you use the association's **member recruitment and orientation tools**. Find customizable flyers, bulletin board materials and info on CTA's Advocacy Agenda and more at cta.org/leader-resources/member-recruitment-and-engagement.

Summer



Theme: *Keep Momentum, Plan & Have Fun!*

Top Tips –

- Invite** CTA Staff and Endorsed Partner Representatives for Fall Presentations
- Distribute Leadership** in your Chapter by ‘Training the Trainers’ for Member Benefits Organizing
- Build on Last Years’ Successes & Opportunities!**

Summer is a great time to use Member Benefits to keep the momentum going and plan for the upcoming year!

Many members are not aware of their eligibility for CTA and NEA Member Benefits programs designed exclusively for educators.

*When our members learn about these programs, they are excited to discover how they can save money and find solutions for their personal needs. When they take advantage of these programs, they begin to develop a **stronger relationship with their associations.***

Summer is for Planning!

- Use the summer to **develop relationships** with your local CTA-endorsed partner representatives (such as California Casualty and The Standard). Schedule them to speak at your monthly Rep Council or attend one of your online member meetings. Maybe they can even sponsor a **door prize!** Just e-mail us at memberbenefits@cta.org and we’ll get you connected.
- Consider placing a “**Member Benefits Spotlight**” in your Chapter newsletter or on your website. Use bright colors and buzz words. Find articles ready for cut-and-paste at CTAMemberBenefits.org/articles.

Member Protections:

- Summer and Fall are fire season in California and that's an important time to communicate with your members about **CTA's Disaster Relief Fund (DRF)**. This fund provides financial assistance to CTA members who suffer significant losses due to natural and other disasters in California. The DRF is funded by voluntary contributions from CTA members and through CTA fundraising drives throughout the year. Go to CTAMemberBenefits.org/drf to find out more.
- Are you aware that a successful **Chapter Campaign with The Standard** is a way to help your members obtain Disability and up to \$200,000 of Life² insurance without the need to provide proof of good health? This is especially helpful for members who have difficulty obtaining insurance due to pre-existing conditions. Contact The Standard to discuss **which month might be best** for your chapter to conduct a Chapter Campaign.
- Summer is also a great time for you to remind members to review their **progress towards a comfortable retirement**. Members can find information on **The CTA 403(b) Retirement Savings Plan** at CTAMemberBenefits.org/rsp and download guides and enrollment forms at CTAMemberBenefits.org/download.
- Refer members to **CTA's Financial Wellness Center** at CTAinvest.org for helpful information, videos of real CTA members and financial calculators.

Identify Leaders:

- Encourage members who attended the Member Benefits session at the **CTA Summer Institute** to **share what they learned** with other members at your meetings!
- Were you able to fit in one of the many CTA/NEA Member Benefits presentations and videos for your members? Be sure to schedule those in regularly to **'spread it out'** and give members just a bit at a time to keep the momentum going. Go to CTAMemberBenefits.org/trainings.
- Hold a meeting with your leadership teams to discuss your **member engagement activities** for the year. What can be improved upon next year? What did your surveys indicate that members want next year? What are some fun ways that Member Benefits will be incorporated?
- Hold a **Site Rep training** prior to the start of the school year. Consider inviting CTA staff and CTA-endorsed partners to discuss programs provided automatically with membership, such as **CTA/NEA Educators Employment Liability (EEL) insurance, Group Legal Services Program (GLS), CTA Death & Dismemberment Plan** and **NEA Complimentary Life Insurance**. Go to CTAMemberBenefits.org/Insurance for an overview of these programs.
- The work of engaging members is all about relationships! Remind your site reps that **1:1 contact**, especially with any new hires, is vital to the health of the association.

☐ Sharable Content: Make it Fun!

- ❖ **Things to Do!** Did you know that CTA Access to Savings offers member deals for online and in-person **tours and travels** - museums, city tours, road trips, athletics, solving mysteries and more? Visit: ctamemberbenefits.org/access.
- ❖ Summer Travel Plans? CTA Member Benefits provides a **Rental Car Program** through Enterprise Rent-A-Car that provides vehicle rentals at reduced CTA member rates. Log-in at CTAMemberBenefits.org/rentalcar to find your exclusive CTA member discount code.
- ❖ Do your members know that NEA offers a **Pet Insurance Program**? Pets are part of the family, so you'd do anything to keep them healthy. Pet insurance helps you give your pets the care they need and gives you the confidence that you can pay for their veterinary bills. Be sure to send your members the link: neamb.com/pet.
- ❖ California Casualty Auto Insurance protects four-legged fur babies with coverage for **pet injury** included in all auto insurance policies. To learn more, visit CTAMemberBenefits.org/calcas.

Summer Start?

- ☐ Download & email or order & share the **Member Benefits Highlights Brochure** (revised annually) with all members. Log-in at ctamemberbenefits.org/forms for the links to download or order CTA Member Benefits publications. Also order materials from NEA Member Benefits by contacting Sean Mabey at smabey@neamb.com.
- ☐ Order (or download) and post **Member Benefits posters** on your bulletin boards for members to see. One features various Member Benefits programs and others specifically feature The CTA 403(b) Retirement Savings Plan.
- ☐ AB 119 now makes it easier for the union to request a list of new hires and to participate in new employee orientations. At your orientations this year, create new member packets. Order the **Member Benefits Folder** and insert your relevant items: **1)** collective bargaining agreement, **2)** membership form or online info CTA.org/join, **3)** *CTA Introductory Disability Insurance flyer, **4)** *Member Benefits publications such as **Highlights Brochure** and **New Member Flyer**, **5)** **The Standard's **Member Enrollment Brochure with application for Disability and/or Life Insurance**, and **6)** a letter from the local President.
 - ✓ *Member Benefits publications are available for download:*
 - ☐ ctamemberbenefits.org/download
 - ✓ *Standard Voluntary Disability & Life insurance²*
 - ☐ CTA Introductory Disability insurance flyer: stdrd.co/IntroDI
 - ☐ Enrollment Brochure: standard.com/ctaleader
 - ☐ Digital New Hire Kit: stdrd.co/digitalkit

CTA Member Benefits Department

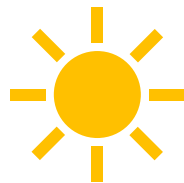
1705 Murchison Drive

Burlingame, CA 94010

E-mail: memberbenefits@cta.org

Phone: (650) 552-5200

www.ctamemberbenefits.org



¹ Brand New is defined as an educator or education support professional who has not previously worked in education in the state of California and has never been a CTA member previously. Your first employment record in CTA's membership database must be no greater than 180 days prior to your CTA membership start date. Disability insurance eligibility requirements apply. For complete terms and conditions, visit standard.com/cta/newhire.

² Coverage reduces to 65% of the amount in force at age 70, 45% of the amount in force at age 75, and 30% of the amount in force at age 80. Offer not available to retirees.

The information described here is subject to all terms and provisions of the Group Policies. For costs and further details of this offer and coverage, including exclusions, benefit waiting periods, any reductions or limitations and the terms under which the policy may be continued in force, please contact Standard Insurance Company at 800.522.0406. GP190-LTD/S399/CTA.1 GP190-LIFE/S399/CTA.3 For more information, visit: standard.com/ctaleader