

CTA/NEA MB Leader Organizing Calendar



Membership engagement and retention begin with your local association. You play an important role in helping your members feel connected and part of our powerful voice for students and public education in California.

For leaders, we have developed free online and virtual resources that provide helpful overviews of the CTA and NEA Member Benefits programs. Visit CTAMemberBenefits.org, NEAMB.com/start, and order or download our **CTA Member Benefits Highlights** brochure, updated annually.

We understand the continuing demands on your time as chapter leaders, so we have formulated some suggested organizing tips to give you ideas for your own organizing activities. *★Tip: These programs can be promoted any time of year, but here is a simple way to spread it out seasonally!*

Fall



Theme: *Back-To School Welcome!*

Top Tips – Fall

- **Promote CTA Introductory Disability Insurance for Newly Hired Educators** who become CTA members within 90 days of starting work¹
- **The CTA/NEA Educators Employment Liability (EEL) Insurance policy**
- **Order Member Benefits Supplies, Update Websites & Bulletin Boards**

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 savings-themed highlights.*

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

Order new publications:

- At a minimum, download or order the **Member Benefits Highlights** brochure (revised annually) for all members. Log-into the CTA Member Benefits website at CTAMemberBenefits.org/leaders. Also order materials from NEA Member Benefits (contact Sean Mabey at smabey@neamb.com).
- Download or order a supply of new **Leader Pocket Guides** for your leaders, including your site representatives, for helpful ways to promote Member Benefits, find contact information, and get ideas for engaging members with Member Benefits.

Spruce up your Bulletin Boards:

- Order (or download) **Member Benefits posters** for members to see. One features a Member Benefits overview and others feature The CTA 403(b) Retirement Savings Plan.

What about New Hires?

- AB 119 now makes it easier for the union to request a list of new hires and to participate in new employee orientations. For your new members this year, create new member packets. Order the **Member Benefits Folder** and insert your relevant items: **1)** collective bargaining agreement, **2)** membership form, **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, and **6)** a letter from the local President.

* *Member Benefits publications are available for download:*

https://www.standard.com/eforms/14742cta_vol.pdf

<https://www.ctamemberbenefits.org/download>

- Encourage members to **register** on both the **CTA and NEA Member Benefits websites**. If members do not know their CTA Member ID, it is listed on the address label of any CTA mailings or e-mail the Membership Department at Membership@cta.org.
- During your district orientation for new hires, consider inviting CTA staff and CTA-endorsed partners to present Member Benefits information. We and our endorsed partners are ready to help and support you with **virtual resources and webinars**.
- 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 teacher orientations, membership meetings and rep councils – virtually or when everyone is ready, live and in person.

Member Protections:

- Highlight **CTA Introductory Disability Insurance** through The Standard. **Newly hired educators** who become members within their first 90 days of work are eligible for 9 months of CTA Introductory Insurance **at no cost to them**¹. Disability insurance is particularly beneficial as these members have limited sick leave, are often not eligible for State Disability Insurance, and may need a pregnancy leave (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!
- If you have a **Flex Plan (Section125)**, warn members about providers who may try to steer them during Open Enrollment toward a product not endorsed by CTA. A sample communication piece for leaders can be found at CTAMemberBenefits.org/leaders.

- September is Life Insurance Awareness Month. Encourage members to name a **beneficiary** for **CTA's Death and Dismemberment Plan & NEA Member Benefit's Complimentary Life**. Also, promote CTA-endorsed Voluntary and Employer-paid Life Insurance through The Standard. Newly hired CTA members have an opportunity to enroll in up to \$200,000 of CTA-endorsed Life Insurance without answering health questions when they apply within 270 days of starting work².

Make it Fun!

- Plan a **virtual 'Back-to-School' event** and offer prizes and drawings. This can also be a party for membership training, a review of your contract, a benefits review and to connect CTA-endorsed partners and site reps. We and our endorsed partners are ready to help and support you with **virtual resources and webinars**.
- For Back-to-School supply discounts you can promote the popular **Access to Savings** where members have access to the largest savings network of its kind. Assist members in downloading the **MyDeals** mobile app, a convenient way to search **over 360,000 deals** and save right from your smart phone. Simply show your mobile device at the cash register to get your discount instantly.

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** your Members to Find Out What Benefits They're Most Interested In

Winter is an ideal time to help protect members with retirement savings options and other financial needs!

*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* along with the *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.

Promoting Healthy Finances:

- ❑ 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 are eligible for and options to lower their payments through an Income Driven Repayment (IDR). Follow-up with Sean at 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.
- **Consider hosting a presentation for your members to help them save for retirement!** See a description of this presentation at CTAMemberBenefits.org/trainings or email team@ctaretirementplan.org.
- While you are promoting retirement savings, be sure to **promote retired membership, NEA Retiree Health, NEA Long Term Care, and CTA VSP Discount** for retirees.
- 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.
- Provident Credit Union was established in 1950 to serve the California Teachers Association. With exclusive discounts designed just for educators, members will earn more with **new account bonuses**, 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.

Make it Automatic:

- Sign-up to receive monthly articles from CTA Member Benefits featuring timely **topics to share with your members**. Go to CTAMemberBenefits.org/signup.
- Once you begin to engage your members about Member Benefits, you will 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 or a flyer for distribution.

Make it Fun!

- Check out **Access to Savings** discounts and share the exciting news with your members just in time for **holiday shopping**. Go to CTAMemberBenefits.org/access to see amazing deals or go to CTAMemberBenefits.org/leaders to download and distribute their informative flyer. Also, encourage your members to download the **MyDeals app** today!
- **Traveling during the holidays?** Take advantage of programs through both CTA and NEA Member Benefits. Whether it is **car rentals, hotel stays, or airfare**, visit the travel pages at both **CTA's Access to Savings** and **NEA's travel deals** and share these great deals with your members!
- 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.
- Provide for a monthly or quarterly social/happy hour virtual event to excite and engage members. Can a Member Benefits component be added? CTA, NEA and our endorsed partners are ready to help and support you with new **virtual resources and webinars**.

Spring



Theme: *Spring Cleaning, Travel, & Entertainment*

Top Tips –

- ❑ Encourage Upcoming **Travel Savings** with Access Discounts & Rental Cars
- ❑ 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 **vacation travel!***

*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 monitoring and advocacy.*

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

Spring Cleaning:

- ❑ Does your **chapter website** include links to both CTA and NEA Member Benefits pages?

- ❖ CTAMemberBenefits.org
- ❖ neamb.com/start
- ❖ CTAMemberBenefits.org/rsp
- ❖ 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.
- Promote our **helpful financial calculators** via The Standard at CTAMemberBenefits.org/TheStandard or CTA’s Financial Wellness Center at CTAinvest.org. These are helpful tools for members to make sure they are adequately protected.
- Many CTA members have children looking at 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 or application fees, or pre-payment penalties**.

Make it Fun!

- Travel, entertainment, amusement parks and movie theater discounts are available through CTA Member Benefits. Check out **Access to Savings** discounts on back-to-school supplies, restaurants, 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!
- 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.

- April showers bring May flowers...remember **Access to Savings** where members could save on flowers, chocolates, gift baskets and more. Promote the link using www.ctamemberbenefits.org/access

Protecting your Spring Purchases:

- With Provident Credit Union, members can earn a **new checking account bonus, save money** with exclusive discounts on **mortgage and auto loan rates**, have the ability to **skip auto loan payments** over the summer months and save for that 12th paycheck with the **accumulator saving plan**. Share the link: CTAMemberBenefits.org/creditunion.
- Feature a California Casualty **auto, home, and renter's insurance** article in your chapter newsletter. Members and their immediate families are offered preferred rates and unique educator-specific benefits. Encourage members to get a **free quote** to learn if they can save money and/or are they adequately insured? Find recent articles at CTAMemberBenefits.org/articles or go to CTAMemberBenefits.org/calcas.

Identify and Organize 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 ctago.org.
- 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!
- Encouraging fellow educators to join CTA and take advantage of the many member benefits CTA has to offer is easy when you use our **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!

- Consider placing a “**Member Benefits Spotlight**” in your Chapter newsletter or on your website. Use bright colors and buzz words. Find articles at CTAMemberBenefits.org/articles.

- Use the summer to **develop a relationship** 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.

Make it Fun!

- Summer Travel Plans? CTA Member Benefits provides a **Rental Car Program** through Enterprise Rent-A-Car that provides members vehicle rentals at reduced rates. This program provides for rentals at a flat rate **as low as \$33.00 a day**, regardless of location. Encourage members to log-in CTAMemberBenefits.org/rentalcar to get their exclusive CTA member discount code.
- Get member-only discounts on **high-quality GE appliances** at this full-service online shopping site through NEA: neamb.com/ge.
- 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.

Member Protections:

- Summer and Fall are fire season in California and 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 Life and Disability insurance without the need to provide proof of good health? This is especially helpful for any members who have difficulty obtaining insurance due to pre-existing conditions. Contact The Standard to discuss with a representative **which month might be best** for your chapter to conduct a Life and Disability 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 and Organize 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. These include the **CTA/NEA Educators Employment Liability (EEL), 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.
- Remind your site reps about their responsibilities and how best to communicate with members, making sure **1:1 contact**, especially with any new hires, is established.

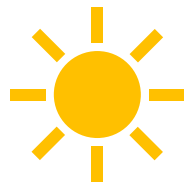
Summer Start?

- Download or order the **Member Benefits Highlights** (revised annually) for all members. Log-into the website at CTAMemberBenefits.org/leaders. Also order materials from NEA Member Benefits (contact Sean Mabey at smabey@neamb.com).
- Order (or download) and post **Member Benefits posters** for members to see. One features Member Benefits and others 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. For your new members this year, create new member packets. Order the **Member Benefits Folder** and insert your relevant items: **1)** collective bargaining agreement, **2)** membership form, **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, and **6)** a letter from the local President.

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¹ CTA Introductory Disability insurance available to eligible new educators starting work on or after 7/1/2020 who become CTA members for the first time within 90 days of their first day of work. Disability insurance eligibility requirements apply.

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.

For more information, visit: standard.com/ctaleader