



**TEXAS RETAILERS**  
A S S O C I A T I O N

# 2019-2022 STRATEGIC PLAN

Approved by the TRA Board of Directors on March 21, 2019



TEXAS RETAILERS  
ASSOCIATION

The 2019-2022 Strategic Plan for the Texas Retailers Association was developed by the Board of Directors and staff of the Texas Retailers Association, and approved by the Board of Directors on March 21, 2019.

<b>Executive Committee (2018-2019)</b>		
Luke Gustafson	Chair	Brookshire Brothers
Kathryn Sharp	Vice-Chair	Stage Stores
Chuck Bell	Secretary	Bracken Textiles/Clothes Mentor
Susan Sessions	Treasurer	Academy Sports + Outdoors
Amber Gustafson	Immediate Past Chair/Life Member	Amber's Designs
Jason Cooper	TREF Board Chair	Brookshire Grocery Company
Daniel Morales	TX Food Council Chair	Walmart
Debbie Mack	TFDS Rep	Walmart
Theresa Flores	TRAPAC Chair	Mary Kay
Michael Smith	Large Retailer	Walgreens
April Martin Nickels	Grocer	Kroger
George Kelemen	CEO/President	Texas Retailers Association

<b>TRA Directors (Term Ending 2018)</b>		
Brian Gamberini	Director	The Home Depot
Michael Diamond	Director	Scott's Miracle Grow
Kristina King	Director	Transform SR Holdings LLC
Leslie Lockett-Sweet	Director	HEB
Ray Pohlman	Director	AutoZone
John Raney	Director	Texas Aggijeland Bookstore
Michael Walker	Director	Rehkopf Enterprises
Jack Tracy	Director	Ziegler's Foods
John Vuong	Director	Pyburn's
April Martin Nickels	Director	Kroger Company



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<b>TRA Directors (Term Ending 2019)</b>		
Jeff Mooney	Director	Dollar General
Carrol Cox	Director	Cox's Foodarama
Rebecca Acuna	Director	Pepsico
Arnold Grothues	Director	JC Penney
Leigh Ann Hernandez	Director	Neiman-Marcus
Mike Lewis	Director	Lewis Food Town
Al Cornish	Director	Target
Meredith Preloh	Director	Lowe's
Rex Solomon	Director	Houston Jewelry
Opio Dupree	Director	Macy's
Lauren Osborne	Honorary Director	Texas A&M Center for Retailing Studies
Joe Stalnaker	Director	Avangard Innovative

<b>TRA Directors (Term Ending 2020)</b>		
Steve Bercu	Director	BookPeople
Phil Rozenski	Director	Novolex
Dan Lopez	Director	Best Buy
Mandy Tomlin	Director	United Supermarkets
Bruce Levy	Director	Rice Epicurean Markets
Michael Smith	Director	Walgreens
Daniel Morales	Director	Walmart
Kathy Mitchell	Director	PetsMart



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## Strategic Plan 2019-2022

The Texas Retailers Association (TRA) represents retailers across Texas, ranging from Texas based companies of all sizes, to those with a significant presence in our state, to independent shops and stores, to the household names you know. Collectively, TRA represents more than 300,000 retail establishments and more than 3 million jobs across the state of Texas.

**TRA MISSION:** TRA represents the companies and retail professionals who make up one of the world's largest economies and provides them a voice at the State Capitol in Austin and on Capitol Hill in Washington, DC. Through TRA's various initiatives we aim to improve the lives of not just Texas retailers, but customers as well. By providing government advocacy, industry information and resources, events, as well as supporting educational programs, we ensure our members' interests and concerns are met, and protected. In short, TRA works to ensure a thriving retail community in Texas.

Over the next three years (2019-2022) TRA will continue to build on its recent success and regained fiscal health to meet its stated mission through achievement of strategies detailed in this strategic plan in each of the following areas:

**MEMBERSHIP:** TRA has a growing, loyal, engaged membership that spans the state and the industry.

**FINANCES:** TRA runs a growing, healthy organization that produces sufficient resources to achieve its mission.

**ADVOCACY:** TRA is the trusted, influential advocate for the thriving retail community, at all levels of government.

**EVENTS/PROGRAMS:** TRA produces impactful, valuable programs and events that connect members and attract wide audiences and key stakeholders.

**COMMUNICATIONS/MARKETING:** TRA is the trusted, preeminent voice for the Texas retail community, providing valuable information and resources.

**TRA CORE VALUES:** TRA's mission and strategic goals will be accomplished by adhering to the following organizational Core Values: **Ethical, Respectful, Fiscally Responsible, Open Communications/ Transparent**



## **MEMBERSHIP**

TRA's membership is diverse and representative of the retailer community in Texas; however, the membership needs to grow to maximize geographic reach across the state, as well as attracting large retailers TRA currently does not have as members, and new retailer entrants into the Texas market. This should include efforts to recruit new members within growing and emerging facets of the retail industry (ex. online retailers and app-based services to the retail industry & customers).

Having members across the state will grow TRA's presence and enhance its grassroots capacity from an advocacy perspective.

TRA should engage in a member mapping exercise to identify geographic area across the state in need of focus. The mapping exercise should be a priority in calendar year 2020, with the goal of establishing a plan to achieve having a TRA member and "Key Contact" in each Texas Legislative District by the end of 2022.

TRA should leverage the membership committee of the Board to develop ways in which the association can leverage its membership to enhance the connections and communications channels with its existing members (for example, expanding the number of TRA contacts within members companies). Additionally, the membership committee should develop ideas for creating member loyalty, recognition, value and TRA pride, with the aim to keep member retention high (for instance, creating a bank of TRA member testimonials and developing an on-line TRA member sticker/ badge for members to display on their websites.)

## **FINANCES**

TRA has achieved restored financial health and should have a goal to operate annual balanced budgets. As such, TRA should consistently strive for a balance between growth and sustainability of the organization. Specifically, TRA should establish a strong financial pool for managing the organization which achieves the balance the organization seeks, while staying true to its mission, core values, and maintaining its non-profit status. A financially healthy organization should also have a plan for reinvesting in the association, though consistently improving business needs that go to enhance member value and experience.

## **ADVOCACY**

TRA's advocacy strength and effectiveness is now firmly rooted and respected at all levels of government, in particular at the state level in Austin and at the federal level in Washington, DC. TRA is the trusted resource and has had advocacy successes at all levels over the past three years as it has regained its advocacy footing and capacity, in keeping with its rich (over 90 year) history as the voice of retail in Texas.



Going forward and building from the current strong foundation over the next three to five years, measures of advocacy success should be defined as the following:

- Demonstrated progress/success on TRA priority issues to include setting of specific goals and a timeline for delivery on the stated goals. Goal setting and timetables should be aggressive, yet realistic given that there are political and legislative factors which will be beyond the control of TRA.
- Demonstrated strength of relationship with elected officials, particularly statewide and legislative leadership, key committee chairmen and members, and the Texas Congressional delegation, with emphasis on those in leadership, as well as those in key committee chairman or vice-chairman/ranking member posts. Strength of relationships should be measured by the access and ability to influence TRA has with these key elected officials.
- Demonstrated advocacy relevance measured by success and attendance of TRA's advocacy focused events (bi-annual lobby days and Advocacy Summits). Specifically, overall attendance, attendance of elected officials and key staff, and positive visibility generated by our events for TRA, our priority issues and the industry.
- Demonstrated growth of the TRA political action committee (TRAPAC). Efforts should focus on continued growth of TRAPAC to facilitate political giving by TRA to key elected officials. Specifically, improved TRA member engagement in PAC giving should be a priority and a strategy and tactics should be developed to yield increased TRA member contributions.

## **EVENTS & PROGRAMS**

Over the past three years TRA has developed, planned and executed two new member events from the ground up, to significant success on all levels. Additionally, TRA has revolutionized an existing event and taken it to new heights in terms of participation and impact. TRA should continue to work to grow the size, participation and relevance of its established events.

- TRA Forum – Established in 2016, the event set a new standard in terms of quality of speakers, informational and educational sessions, and networking opportunities for TRA members and the retail industry in Texas. AS TRA's signature annual event, TRA should continue to build on the Forum's success by increasing TRA's revenue, visibility, brand awareness, as well as interest in and growth of TRA. Additionally, the Forum should continue to be leveraged in terms of TRA member and industry engagement, education and networking opportunities.



- Advocacy Summit – Established and successfully debuted in 2018 as TRA’s advocacy specific biannual event. The first TRA Advocacy Summit was a major success on all levels. The TRA Advocacy Summit significantly raised TRA’s advocacy profile with both federal and state level elected officials. Additionally, it was a profitable event due to good attendance and sponsorship support. TRA should continue to leverage the Advocacy Summit in even numbered years to maintain advocacy relevance and visibility with elected officials in Texas during non-legislative/election years, and equally as important with member of Texas’ Congressional delegation. The Advocacy Summit should continue to be maximized as a TRA member engagement opportunity, TRA member visibility opportunity (through sponsorships), and revenue generation for TRA.
- Lobby Day – Our biannual Texas Retailers Lobby Day at the State Capitol serves as an illustration of our advocacy strength and relevance. Recently, TRA’s lobby day has set a new standard for our advocacy efforts going forward, in terms of both participation and impact. TRA’s lobby day should continue to be leveraged as a key component of our advocacy relevance and strength at the state level by continuing to grow member participation, enhance effectiveness through our members’ experiences during lobby day, and use of new technologies to maximize TRA lobby day impact with the Legislature (ex. geo-fencing the State Capitol and social media activities).

## **COMMUNICATIONS**

In recent years TRA has made great strides in regard to its communications efforts, both internally (member communications) and externally. TRA has greatly enhanced the quality and quantity of how it communicates with its members, while simultaneously expanding its overall communications reach. Additionally, TRA has made great strides in establishing itself as the preeminent resource for the media on all things retail in Texas. TRA should continue its efforts to constantly refine its communications efforts internally and externally, taking advantage of available technology which will allow for the association to expand its communications reach and by extension its profile to yield new memberships and partnerships.

Specifically, over the next three to five years TRA should do the following to ensure continued and growing success in the area of communications:

- Internal/ Member communications – Maintain recent efforts of continually improving the quality and content of member communications, specifically the monthly newsletter, member alerts, member focused information and promotions for TRA events, and member-only web access such as member-clicks. Quality and content of these varied communications formats should not only provide timely and useful information, but also be leveraged toward member engagement, where applicable.



Additionally, uses of more platforms by which to communicate with members should be continually explored. Examples such as member focused videos and podcasts will need to be established over the next three to five years.

- External – Similarly, continue to build on the external communications success TRA has established over the past three years. The explicit goal being that more people outside of TRA see and are exposed to TRA through its external communications efforts to assist in the growth of memberships and partnerships.
- Analytics which track our communications efforts, such as open rates, click rates, as well as measurement of reach, should be used to provide feedback and qualitative results of TRA’s communications efforts.
  - TRA Website – TRA’s virtual front door has come a long way in the past three years; however, in order for TRA to get the most out of its capability it needs to stay relevant with content and information. Additionally, it must stay technologically relevant in order to support the various communications platforms that are common now, as well as those that are emerging.
  - Social Media – Continue to leverage very effective use of social media to broadly promote the association, its members and activities. Maintaining the consistently robust social media presence TRA has built over the past three years will continue to have a positive impact related to TRA’s perceived power and prestige and the association will continue to leverage it on a consistent basis. Over the next three to five years, expanding TRA’s social media presence beyond Facebook, Twitter, and LinkedIn, to include Instagram and any other new emerging social media platforms will be a priority. Additionally, conducting periodic analytical measurements of the effectiveness and reach of TRA’s social media efforts should become standard operating procedure, in order to guide efforts toward successful outcomes.
  - Media Relations – Over the past three years, TRA has positioned itself as THE resource on the retail industry for the media in and covering Texas. As a result, TRA regularly has opportunities to speak with media outlets on behalf of the Texas retail industry regarding important industry issues, events and information. Continue to build media relations capability to more firmly cement TRA’s position as the industry resource and effectively continue to tell the Texas retail story as broadly as possible via the print and broadcast (radio and TV) media.



## **CONCLUSION**

Over the next three years (2019-2022) TRA will continue to build on its recent success and regained fiscal health to meet its stated mission through achievement of strategies detailed in this strategic plan. This plan represents the vision of the TRA Board regarding the strategic focus of TRA from 2019-2022. The strategic direction called for in this plan will guide TRA's success during this three-year period and will be carried out and supported by tactics mutually agreed upon by the TRA board and staff. At a minimum of two times per year, the TRA Board and staff will discuss progress toward achieving the strategies laid out in this plan. Additionally, beginning with the end of fiscal year 2020 (Aug. 31, 2020), TRA staff will produce an annual report which details the state of the association, as well as progress made toward the strategies called for in this plan over the course of the preceding 12 months.