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# *The* VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

## TRTA RECAPS THE 87TH SESSION: THE GOOD, THE BAD, AND THE “WHAT’S NEXT?”

By **Tim Lee**  
Executive Director

The 87th Texas Legislative Session featured many highs and one very difficult low for members of the Texas Retired Teachers Association (TRTA). TRTA helped to successfully pass a budget with \$5 billion in funding for our TRS defined benefit retirement plan. We also worked to pass the most TRS member-focused sunset bill in the last 15 years, if ever. There were many other major accomplishments this session that will help thousands of current and future TRS retirees.

There is one TRTA priority that did not pass: the much-needed cost-of-living adjustment (COLA) for our deserving retired educators. As TRTA members know, only the Texas Legislature can authorize a COLA for TRS retirees. Our members worked hard, expressed their needs, and delivered powerful testimony throughout session that a benefit increase was both possible and necessary.

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## TRTA RECAPS THE 87TH SESSION: THE GOOD, THE BAD, AND THE “WHAT’S NEXT?”

The Legislature’s lack of action on the COLA is a difficult blow that TRTA leaders and members are still grappling with. TRTA is proud of the work our members put into the regular session. Tens of thousands of TRTA members participated in the legislative process by making phone calls, sending emails, writing letters, attending Zoom meetings, and asking their elected officials for help. No other group works harder than TRTA, and this session was proof that not even a pandemic could temper the fervor that our members bring to a legislative session!

By the end of the 140 days, the TRTA membership achieved many great outcomes; but we must also remain focused on the next steps—the possibility that a special session will give us time to work with the Texas Legislature on a COLA and get much-needed financial relief for TRS retirees.

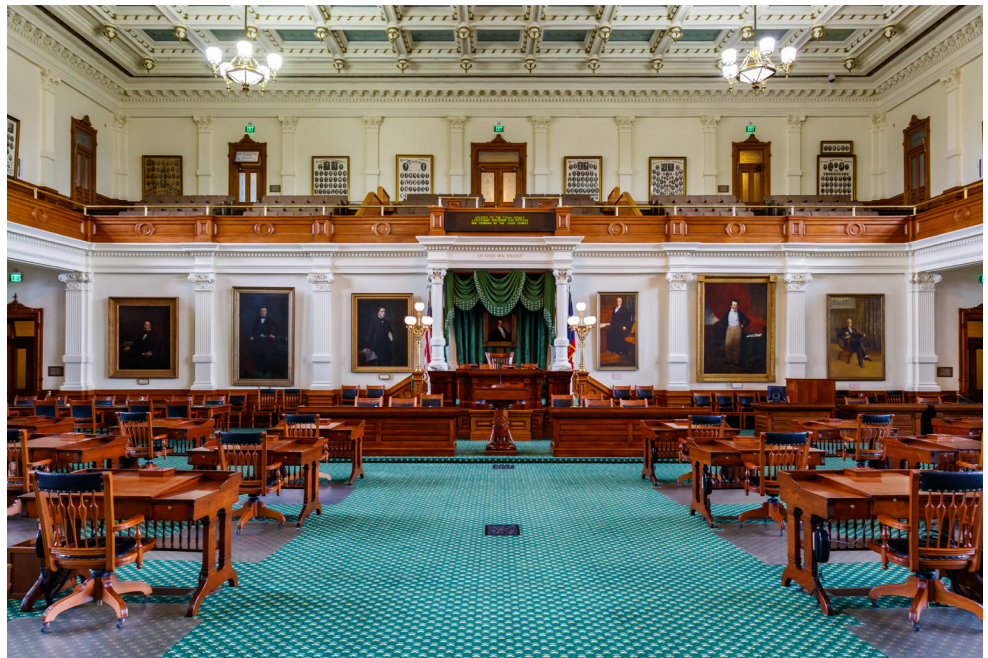
Below is TRTA’s comprehensive recap of the 87th Texas Legislative Session.

### The Good: Many Bills That Help TRS Retirees Passed This Session

TRTA worked to pass a number of meaningful pieces of legislation this session. These successes include a bill that adds state funding to the pension trust fund, the TRS Sunset bill, a TRS-Care “golden ticket” bill, two return-to-work bills, two tutoring bills, and a Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) reform resolution.

### Senate Bill 1 – The State Finance Bill

The state finance bill was the most important piece of legislation that TRTA worked to pass this session. It was critical for the state to keep its promise from the previous 86th Legislative Session to increase its contribution to TRS. This year, the state appropriation to the TRS pension fund is \$5 billion. Nearly \$1 billion of this total appropriation is new funding from general revenue to cover increased state contributions and keep the fund actuarially sound.



Senate Bill 12, passed in 2019, requires the state to increase its contributions to TRS until they reach 8.5% in 2025. The state has made a commitment to increase funding again in the 2023 session to meet this obligation and keep the fund sound.

### HB 1585 – The Sunset Bill

(Authored By: Lambert; Joint Authors: Canales, Paddie, Goldman, Cyrier; Co-Authors: Dean, Fierro, Guillen, Ordaz Perez, Ramos, Rogers, Slaton, Spiller, VanDeaver; Senate Sponsor: Lucio, Jr.; Co-Sponsor: Blanco)

The TRS Sunset bill made several important changes to the state agency, including mandating TRS to be more responsive to member needs, creating an ombudsman position at TRS to assist members with agency issues, requiring TRS to report publicly financial bonuses made to its investment managers, and increasing customer service in health care appeals.

The bill changes the exemption date for full-time work restrictions and penalties to allow for any current retiree who retired before January 1, 2021 to return to work full-time with no restrictions or penalties. TRTA members have been working on these issues since 2019, and we are proud of the Legislature’s responsiveness to ALL the issues raised during the sunset process.

### HB 2022 – Golden Ticket Bill

(Authored By: Darby; Joint Authors: Rogers, Jarvis Johnson, Morales, Shaw, Herrero; Co-Authors: Allen, Burns, Campos, Dean, Frullo, Guillen, Harless, Ken King, Kuempel, Lopez, Minjarez, Price, Raney, Smith, Spiller, Tinderholt, Vo, Zwiener; Senate Sponsor: Huffman; Co-Sponsor: Hinojosa)

The “golden ticket” bill allows certain Medicare age-eligible TRS retirees to return to TRS-Care. After the changes made to TRS-Care in 2017, thousands of retirees left the health care program. Once out of the program, retirees could not return. The golden ticket bill will allow those retirees who left between 2017 and 2019 a one-time opportunity to rejoin TRS-Care.

Please note, this measure is awaiting action from the Governor. If Governor Abbott does not veto the bill, it will become law on September 1, 2021. TRS retirees





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interested in this matter or other TRS-Care issues should speak with a TRS counselor before making any decisions relating to their health care insurance.

## **SB 288 – Return-to-Work Bill**

(Authored By: Seliger; Co-Authors: Blanco, Buckingham, Lucio, Paxton, Schwertner, Springer, Zaffirini; Sponsor: Wu; Co-Sponsors: Anchia, Dean, Ordaz Perez, Allen)

For many years, retirees who returned to work in the classroom faced losing an entire monthly pension check as a penalty for working over their allotted time period by even a small amount, defined as half-time by TRS. SB 288 reforms the penalty structure to require warnings before any financial penalties are incurred.

When combined with the return-to-work exemption date change in HB 1585, the new warning system will impact only TRS members who retired after January 1, 2021. TRS members who retired before that date are exempt from all work limits.

## **HB 3207 – Return-to-Work Disaster Bill**

(Authored By: Herrero; Joint Authors: Anchia, Parker, Capriglione, Stephenson; Co-Author: Morales Shaw; Senate Sponsor: Menendez; Co-Sponsor: Hinojosa)

HB 3207 provides a path for retirees to return to work with no penalties or

surcharges during times of a declared disaster, such as during and after the February 2021 winter storm, Uri.

## **SB 1356 – The Tutoring Bill**

(Authored By: Hughes; Co-Authors: Gutierrez, Zaffirini; Sponsor: Dutton)

SB 1356 allows organizations, such as the Texas Retired Teachers Foundation (TRTF) and TRTA, to offer tutoring services to school districts. This is a significant step forward to help school districts by offering tutoring services through retired educators. You may learn more about TRTF’s tutoring program at [www.trtf.org/tutor](http://www.trtf.org/tutor) and in our article on page 13.

The pandemic created many difficult hardships on our active school educators, schools, parents, and especially our students. Often during the session, we heard stories about “learning loss” that were occurring due to COVID-19. As schools prepare to fully reopen in the fall, the focus has shifted to “learning recovery.”

In addition to the state’s focus on learning recovery, the federal government has distributed millions of dollars to help fund high dose tutoring in Texas. A retired educator working as a tutor who is paid with federal funds will not have any TRS-related return-to-work issues, nor will the school district surcharge apply to their service.

Our students, teachers, parents, and schools need help, and the work of TRTF and TRTA along with SB 1356 provides a unique path for retirees to be a source of help while also earning some extra income.

## **SB 202 – TRS Contributions**

(Authored By: Schwertner; Sponsored By: Anchia)

SB 202 changes the current practice allowing TRS surcharges to be shared by the employer (the school district) and the employee (the TRS retiree). The employer is now responsible for all surcharges for the pension fund and TRS-Care for employees who have returned to work more than half-time.

## **SCR 17 – WEP Reform**

(Authored By: Hughes; Co-Authors: Blanco, Buckingham, Creighton, Gutierrez, Hall, Hinojosa, Kolkhorst, Lucio, Springer, West; Sponsor: Herrero; Co-Sponsors: Munoz, Jr., Parker, Capriglione, Toth)

SCR 17 is a request from the Texas Legislature to the federal government to repeal and reform the harmful Windfall Elimination Provision (WEP).

TRTA’s District 4 legislative committee member, Dr. Mary Widmier, provided testimony on June 15 to the U.S. House Ways and Means Committee. The House Ways and Means Committee manages Social Security issues. Widmier discussed how she and many other retired educators are negatively impacted by the WEP. She worked for 36 years as an educator in Texas and 21 years in the private sector.

TRTA has partnered with the Mass Retirees to form the Public Retirees Alliance. The goal of the Public Retirees Alliance is to reform the WEP, and to help get retirees back the money that they earned during their careers. Learn more about the partnership and the latest WEP reform efforts at [publicretirees.org](http://publicretirees.org).

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## Online Tutoring Services

Matching retired Texas public-school teachers, with students, families, and districts that need tutoring services and support.

To learn more visit: [trtf.org](http://trtf.org)





## TRTA RECAPS THE 87TH SESSION: THE GOOD, THE BAD, AND THE “WHAT’S NEXT?”

### The Bad: No COLA for Retirees Even Though It Was Possible

The Legislature has told retirees for many years that it would pass a COLA when the Teacher Retirement System of Texas (TRS) could pay off its unfunded liabilities within 31 years. The 31-year marker is in statute, an indicator commonly referred to as “actuarial soundness.”

Thanks to additional state funding and a profitable stock market, TRS reached that threshold this year. Retirees were excited about the prospect of receiving a COLA. Any TRS retiree who has retired since September 1, 2004 has NEVER received a COLA!

However, leadership in the Texas Legislature decided not to make a COLA a priority this session. TRTA is asking Governor Greg Abbott to add a COLA or other benefit increase to the call for the special session. The special session is scheduled to begin on July 8 and will have legislators return to the Capitol to address issues that were not finished during the regular session that ended in May.

Despite these challenges, the TRTA legislative team accomplished several significant successes. TRTA worked with legislators to infuse \$5 billion from the state into the TRS pension plan, and by doing so, helped protect the defined benefit plan for current and future retirees.



Meanwhile, the Texas Employees Retirement System (ERS) is moving towards a cash balance plan for future employees, which defines the promised benefit in terms of a stated account balance, characteristic of a defined contribution plan. **After this year, TRS will be the last standing statewide traditional defined benefit plan for Texas public workers.**

### What Stopped the COLA Bill From Advancing?

The most accurate answer to this question seems to be that a COLA was not a priority for the 87th Legislature. This answer necessitates some review.

The Texas Senate had several COLA bills, as well as a supplemental payment bill, drafted and referred to the Senate Finance Committee. None of the bills were given a hearing.

It is unfortunate that these bills were not given a chance to be heard in public. Retirees would have been able to offer testimony, explaining why it is the right time to provide a COLA or other benefit enhancement. These bills all failed in the Senate.

The Texas House also had numerous COLA and supplemental payment bills and other strategies in play throughout the session. While all of them ultimately failed, the House pursued COLA and supplemental payment options for TRS retirees this session more actively.

The most widely known of these options were HB 3214 by Representative Giovanni Capriglione and HB 3507 by Representative Glenn Rogers.

HB 3214 was a true COLA bill that would have provided a 6% increase to TRS retirees capped at \$100 per month. The bill would have authorized the COLA and allowed the Legislature to use any method available to fund the pension increase. The bill maintained the trust fund’s actuarial soundness. The House Pensions, Investments, and Financial Services (PIFS) Committee

held a hearing on HB 3214 and voted it out unanimously.

HB 3507 authorized a one-time supplemental payment capped at \$2,400 for all eligible TRS annuitants. The bill also maintained the pension fund’s actuarial soundness, with minimal impact on the system. The House PIFS Committee had a hearing on HB 3507 and voted it out unanimously.

These bills were sent to the House Calendars Committee and were held there without movement. TRTA requested a meeting with Calendars Committee Chairman Dustin Burrows; however, he did not meet with our Capitol legislative team. TRTA met with his staff and received the advice to work with the remaining committee members. TRTA met with every Calendars Committee member and heard little to no resistance to advancing the COLA or supplemental payment bills.

Other legislators suggested TRTA leaders should meet with Representative Greg Bonnen, Chairman of the House Appropriations Committee, who met with us on April 28. We are grateful to Chairman Bonnen for the meeting. He provided some insight into why the bill had been held up in the Calendars Committee.

In a letter from Chairman Bonnen dated May 7, 2021, he stated: “Direct and candid dialogue is the centerpiece of trust between legislators and organizations like yours. To that end, I fully support a cost-of-living adjustment (COLA) for our state’s retired teachers, however the information provided by TRS gives me pause about whether this session is the appropriate time to move forward.”

On May 11, 2021, TRTA met with TRS leaders. We reviewed the information and both sides agreed that it was factual. TRTA didn’t disagree with the information provided by TRS.

TRTA suggested ways to improve the







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actuarial analysis, as well as other key items related to the benefit the COLA would provide to TRS retirees.

TRTA asserted that the Legislature knew the methods available to provide a COLA. The two major conditions for the COLA already had been met: the TRS fund was actuarially sound, and the proposed COLA would be possible while still maintaining the fund’s actuarial soundness. The rest of the information, including pre-funding and finance costs, was relevant only to the methods available to the Legislature to authorize an increase.

TRTA’s perspective on the information provided by the TRS actuarial impact statement was that it could be used to argue for or against the COLA. Facts are facts, but how the information was used to support or deny an action is up to interpretation.

TRTA believes that a few elected officials may have focused more on the data points TRS provided than others. The view of these data points without proper context adversely impacted the bill’s progression.

The Texas House Calendars Committee never released HB 3214 or 3507 for a vote by the full Texas House and the bills died in committee.

By the end of session, the answer provided by the Legislature to TRS retirees on what killed the COLA seemed to be, “TRS is not yet fiscally stable enough; therefore, not now.”

### What Now?

TRTA has asked Governor Abbott to add a COLA to the list of issues that need to be addressed during the special session.

More than 130,000 TRS members are receiving less than \$1,000 per month in their annuities, without the benefit of Social Security. 95% of retired educators did not pay into the federal program through the school districts for which they worked.

Most retired educators rely on TRS as their sole source of retirement income. Public education retirees have been asked numerous times to wait until the TRS fund is “actuarially sound” before the Legislature would be able to authorize a COLA for them. TRTA has partnered with the Legislature and pushed for reasonable pension benefit reforms, as well as the necessary stakeholder and legislative funding changes, to ensure TRS is fiscally stable.

TRS retirees believe that elected leaders made a promise to help them when the TRS pension trust fund was actuarially sound. Now is that time! A COLA would improve the retirement security of all TRS members, while still preserving the TRS fund for future retirees. It is the right thing to do. A COLA would benefit approximately 400,000 Texans who dedicated their lives to the service of Texas students, parents, and communities. Now is the time to help them!

### TRTA Members Ask Governor Abbott to Add COLA or Other Benefit Enhancement to the Call

TRTA asked its members to contact Governor Abbott’s office to request that a COLA be placed on the agenda for TRS retirees during the upcoming special session. Our members who receive our electronic newsletter, *The Inside Line*, were able to use an email action alert to send in this request.

If you are not signed up for *The Inside Line*, you can sign up for free here: [www.trta.org/the-inside-line](http://www.trta.org/the-inside-line). This service is the fastest way to receive news and urgent action items from TRTA. Once an agenda of special session topics has been released, TRTA will update members on Facebook as well. Please be sure to follow and like us at [www.facebook.com/TexasRetiredTeachers](http://www.facebook.com/TexasRetiredTeachers).

Members who wish to call the Governor’s office to ask that a COLA be added to the special session agenda may call 512.463.2000.

### We Will Continue the Fight

The TRTA leadership and legislative team has heard from many members and supporters about the progress of a COLA for TRS retirees. Our members have turned every stone and advocated on their own behalf and others to achieve this goal. It’s easy to feel disappointed, frustrated, and exhausted.

Your efforts are not in vain. TRTA’s advocacy isn’t fruitless, and it’s never concluded. We still have hope, and there are still new strategies to pursue. Without TRTA and without our members as our statewide advocacy network, none of the things we achieved this session would have been possible.

Improved retirement security and flexibility in retirement to earn additional income are years-long battles we have fought and finally won. TRTA and its members pushed for these bills to be introduced and made a lot of headway at a time when we were told the state’s priorities were the pandemic, winter storm recovery, and the state’s electricity grid. Without our constant vigilance and the support of many friendly legislators, our issues would have been swept aside in favor of these major dilemmas.

Despite everything, we had tremendous support in the Legislature, with hundreds of bill co-sponsors and legislators speaking out on behalf of retirees in the final days expressing their dissatisfaction with the COLA not passing. The support is still there, and we must harness it.

Together, we are a strong and unified organization. It’s easy to be angry about the outcome; it’s hard to get back in the ring and fight yet another day. TRTA, though, is focused on winning. Yes, we have had a major setback. No, we will not retreat now that summer is here, and session is over. We believe passing a COLA or other benefit enhancement for TRS retirees is the right thing to do, and we will keep working towards that goal until we accomplish it. ★

# ★ PUBLIC RELATIONS UPDATE

By Ella Gauthier, Second Vice-President/Public Relations Committee Chair



President Leroy DeHaven's theme "All Aboard the TRTA Express" has had TRTA navigating a fast-moving train through the many curves and forks of the COVID-19 pandemic during the past year. TRTA successfully overcame many challenges, such as no face-to-face meetings at the state, district, and local unit levels and the state staff working remotely. With various online meeting venues, we were able to keep the TRTA Express train on the track!

As your Second Vice-President and Public Relations Chair, I have been impressed with the many activities of local units as they worked to stay connected with members. My heart was filled with joy when I saw photos of locals safely continuing services projects within their communities. Finally, we are returning to a new normal and with that comes a return to in-person meetings.

As units return to in-person meetings, we encourage them to share information with local media and the Public Relations Committee. Since local units have not met in person for over a year, publicizing the first meeting is important. Use this meeting as a time to celebrate! The Public Relations Committee would love to share this information on Facebook. Remember, publicity is important to help make your community aware of who you are and what you do!

An important project of the Public Relations Committee is the Children's Book Project. In 2020, local units distributed 102,283 books. The term "distributed" is used because even though more books were collected, not all were distributed if the recipients (schools or charitable organization) were being cautious due to the pandemic. Just think, more than 100,000 books are now in the hands of children who would not otherwise have books of their own!

An ongoing project of the Public Relations Committee is the collection of anniversary dates of local units and any associated history. Anniversary milestones are celebrated on the TRTA Public Relations Facebook page as well as the TRTA mobile app. If your local unit has not shared this information with the committee, it is not too late! We would love to help you celebrate.

I would like to thank the members of the state Public Relations Committee for all their hard work in what has proved to be a challenging year—Nan Bell, Pamela Elza, Chiqui Guerra, and Linda Retzloff. Also, thanks to Laura Escareño (TRTA staff) for her insight and help. Mostly, thanks to each of you for your dedication to TRTA. Until we see each other at the state convention in 2022, I'm sending you a virtual hug. ★

## All Aboard the TRTA Express to Dallas in April 2022!

Planning for the 68th TRTA Convention is underway! Mark your calendars now to attend the state convention April 11–13, 2022 at the Hilton Anatole located at 2201 North Stemmons Freeway. This Texas-sized hotel spans more than 45 acres just north of downtown Dallas and is located conveniently in the Design District. The Hilton Anatole features nine onsite dining options, a renowned art collection and sculpture garden, gift shops, and much more.

Convention registration and hotel reservations will be available by this coming fall at the group rate of \$189 per night, excluding tax, for a single, double, triple, or quad room. Parking will be offered at a discounted rate of \$5 per night for hotel guests only.

Stay tuned for more exciting information in the next issue of *The VOICE*! ★







As members of the Texas Retired Teachers Association (TRTA) may know, the Board of Directors responded to the growing safety concerns of the COVID-19 pandemic by voting unanimously to ban all TRTA in-person meetings and activities through June 30, 2021.

As the meeting ban comes to an end, TRTA is excited to begin planning its first in-person events beginning July 1—starting with the District Presidents Leadership Training Conference in Pflugerville July 12-15—and encourages all districts and local units to follow CDC guidelines as you prepare to join together in fellowship once again.

Many local units have been utilizing Zoom videoconferencing services to conduct meetings for more than a year and are encouraged to continue using the platform for business purposes as they see fit.

Now, TRTA is proud to introduce the new TRTA Family Reunion campaign! We know our members have missed gathering and enjoying one another's company, and we hope to encourage districts and local units to make their first in-person meetings of the new fiscal year true celebrations! Rather than a traditional business meeting, please consider using this precious time as a "family reunion," where you can catch up with old friends and embrace new ones, including area at-large members.

Some of the great ideas being shared by our locals include having a coffee bar with a question-and-answer session about TRTA, a late summer popsicle party, or hosting fun events with prizes using board games, bingo, dominoes, or cards. We'd love to hear about your ideas and share them on the TRTA Facebook page and in our mobile app. Send an email to [info@trta.org](mailto:info@trta.org) and let us know how you plan to celebrate your district or local unit's TRTA Family Reunion!

Not sure what to do? No worries! TRTA will be sending information to all local unit presidents very soon about how to plan their reunions and ensure all of their local and at-large members in the area are invited! TRTA members can also visit [www.trta.org](http://www.trta.org) or the TRTA app to view local unit meeting schedules.





## AUBREY CHERRY WINS PRESTIGIOUS E.L. GALYEAN AWARD

Aubrey Cherry is this year's recipient of the Texas Retired Teachers Association's (TRTA) highest honor, the E.L. Galyean Service Award. This award recognizes a TRTA member for outstanding and unusual service on the state level to TRTA and its members.

Mr. Cherry has been a member of TRTA for more than 25 years and has served in numerous leadership positions. He was the local unit president for El Paso RTA (EPRTA) and served as District 19 President. He served on the TRTA Board of Directors from 2000 to 2012.

Ronald Leiman, TRTA's current District 19 President, described Cherry as "the epitome of a professional educator." Leiman added that Cherry has been "a wonderful ambassador for retired teachers...over four decades, he has been an integral leader for retired educators in El Paso and throughout West Texas."



Many members may know Cherry from his work at the TRTA Conventions. "In the decade I've been attending state conventions, I look forward to seeing Aubrey and his wife, Frances, at the registration desk." Frances serves on the convention Credentials Committee and is also a leader for EPRTA and District 19. "I imagine over the past 20 years," said Leiman, "hundreds of us have looked forward to seeing the Cherrys at the convention."

The E.L. Galyean Award serves as a reminder of the distinctive quality of committed service. Cherry is a well-deserving recipient of the award, as he has provided leadership and inspiration through his decades of service.

"Aubrey Cherry exudes competence and inspires confidence," said Leiman. "His demeanor is calm, and laughter comes easy with him. There is a natural grace about him. He is a person I want to talk to, learn from, and be mentored by."

Congratulations to Aubrey Cherry on receiving this prestigious honor! ★

## TRTA ANNOUNCES MEMBERSHIP AWARDS WINNERS

Each year, the Texas Retired Teachers Association (TRTA) provides membership awards to stimulate growth in our local units and districts. These awards are given to local units and districts that have experienced the most membership growth and the highest percentage of growth over the previous year.

February 28, 2021 marked the end of the 2020–2021 membership year, and TRTA closed the year with an admirable 96,410 members. Many of these memberships are directly attributed to our districts and local units, who work tirelessly to recruit and renew members in their area. TRTA is excited to announce the winners of the 2020–2021 membership awards below.

At the local unit level, Hill Country RSEA obtained the highest increase in membership and Baylor Co ARSP achieved the highest percentage increase in membership during this time.

At the district level, District 20 grew by the highest number as well as the highest percentage and has earned both awards.

In addition to the above winners, we would like to recognize 40 other local units that surpassed their 2019–2020 membership totals. The following 40 local units are recognized: Amarillo RTA, Angelina RTSPA, Bandera Co RTA, Bee Co RSP, Blanco Co ARE, Brenham Area RSP, Burkburnett Area RTA, Clay Co ARSP, Dimmitt Area RSPA, Ennis RSPA, Erath CARSE, Everman Area RSEA, Fannin Co RTSP, Fayette Co RTA, Freestone Co RTA, Galveston RTA, Gillespie Co RTA, Goliad Co RSP, Grapevine-Colleyville ARSE, Haskell Co RTA, Highland Lakes RTA, Houston ART, Kendall Co RTA, Lamb Co RTA, Madison Co RSPA, Maverick Co RSPA, Menard-Kimble-Mason, North San Antonio RTA, Oil Patch TRTA SE, Olney RTA, Parmer Co RTSP, Rancho Viejo RSEA, REA Panhandle Schools, Robertson Co RTA, Slaton RTA, Swisher-Briscoe RSP, Terry Co RTA, Tri-Co RTA, West Ellis Co RSP, and Zapata Co RSEA.

TRTA wishes a sincere congratulations to our winners and to all local units for striving to grow our membership every year. TRTA cannot succeed without our local units and districts, and we appreciate all of their hard work!

The TRTA membership drive is underway for the coming 2021–2022 membership year, and your membership status is on the back address portion of this issue. No other group focuses solely on protecting your TRS retirement security. Please renew today! ★





## 2021 DISTRICT FALL CONFERENCES

The 2021 District Fall Conferences will take place throughout September and October 2021. For a full schedule of conference dates, times, and locations, please visit [www.trta.org/fallconferences](http://www.trta.org/fallconferences).

## Support for Older Adult Survivors of Abuse

By Shelby Enman, Social Work Intern, Texas Health and Human Services Commission

Domestic violence (DV) is a widespread issue that can impact anyone. DV includes the use of emotional, physical, financial or sexual violence by a person to gain control of an intimate partner, family member or other loved one.<sup>1</sup> In Texas, 37.7% of women and 26.8% of men experience DV over the course of their lifetime.<sup>2</sup> Older adults can be abused as well. According to the National Council on Aging, about one in 10 adults ages 60 and older nationwide have experienced abuse.<sup>3</sup>

Elder abuse is defined as any intentional or neglectful act that causes harm or risk of harm, including self-neglect. This type of violence can include elements of DV but is specific to abuse of vulnerable adults. A vulnerable adult is defined as any adult who has a disability or who is age 65 or older. Adult Protective Services (APS) investigates allegations of abuse that vulnerable adults experience. Everyone 18 and older in Texas is required by law to report suspicions of elder abuse to APS. If you suspect that an older adult you know might be experiencing abuse, call APS at 1.800.252.5400 or visit [txabusehotline.org](http://txabusehotline.org).

Many older adults in Texas seek help from their local family violence program. The Texas Health and Human Services Commission (HHSC) Family Violence Program oversees crisis centers and domestic violence programs across Texas that support people who have experienced abuse. Of the 64,623 people served by an HHSC-funded family violence program in 2020, about 9% identified themselves as age 50 and older and 785 identified as age 65 and older.<sup>4</sup>

"Family violence programs understand the complex issues that survivors of domestic violence face," said Cody Rothschild, program and policy specialist with the HHSC Family Violence Program. "They offer trauma-informed support services to help people create safety plans and gain access to resources to help them live lives free of abuse. Any survivor of domestic violence can access these services for free."

Although DV and elder abuse are serious, widespread issues, there are resources and services available to help survivors. If you or someone you know are experiencing abuse, please connect with the following resources below to find support.

**National Domestic Violence Hotline:** call 1.900.799.SAFE or chat online at [thehotline.org](http://thehotline.org)

**Find an HHSC-Funded Family Violence Program in Texas:** [txhhs.maps.arcgis.com/apps/webappviewer/index.html?id=ac994e4a3ed94fa6854b18c0e31651ca](https://txhhs.maps.arcgis.com/apps/webappviewer/index.html?id=ac994e4a3ed94fa6854b18c0e31651ca)

Note: Locations reflect only HHSC-funded programs and, for safety purposes, are approximate.

1. <https://nnedv.org/content/forms-of-abuse/> and <https://www.thehotline.org/identify-abuse/power-and-control>
2. <https://sites.utexas.edu/idvsa/files/2019/03/Statewide-Prevalence-of-Intimate-Partner-Violence-in-Texas-NBA.pdf>
3. <https://www.ncoa.org/public-policy-action/elder-justice/elder-abuse-facts/>
4. Texas Health and Human Services Family Violence Program. (2020). FY20 FVP Older Adults Served.

## Age Well Live Well

BE INFORMED.

"Understanding what options are available helps me make the right decisions."



Find the services and programs you need at [www.AgeWellLiveWell.org](http://www.AgeWellLiveWell.org)

# 40 years of service

## BERNADETTE “B” ZIMMER-BIRDSALL



Hundreds, if not thousands, of members know and love our beloved Bernadette “B” Zimmer-Birdsall, who in recent years has worked as an administrative assistant for the organization. What some may not know is that after 40 years of dedicated service to our organization—more than half the lifespan of TRTA!—B is retiring.

B was TRTA’s first full-time employee and began her career as the association’s Secretary in 1981, holding that position for 22 years. She worked under TRTA’s first Executive Director, the renown E.L. Galyean, and has worked for every single Executive Director TRTA has ever employed.

Some of B’s fondest accomplishments while working for TRTA include the passage of the TRS-Care retiree insurance plan in 1985, the first ever healthcare plan established for Teacher Retirement System of Texas (TRS) annuitants.

B was also with TRTA during the pivotal Consumer Price Index (CPI) Catch-Up Plan, which provided benefit increases for retired public educators for four consecutive legislative sessions. In 1995, the Texas Legislature approved a \$1.6 billion increase for TRS annuitants. She served as Director Mike Lehr’s right hand, often working late into the night, during a time that impacted the success and financial health of the TRS pension fund forever.

She also fondly remembers serving as Secretary for TRTA’s charitable partner organization, the Texas Retired Teachers Foundation (TRTF), between 2003 and 2007. She managed the Foundation’s TRTA building fundraising project and sold hundreds of bricks to generous donors whose names now appear on a permanent walkway outside the building at 12th and Trinity streets.

It is with tremendous gratitude and undeniable sorrow that we wish a fond farewell and best wishes to B. She has been a matriarch among the TRTA family, and her contributions towards the retired educator community are deeply impactful.

We ask those who would like to honor her contributions to TRTA and TRTF to please consider making a donation to the Foundation’s Donate Your Date campaign to recognize her 40 years of commitment. Thank you, B, for walking with us every step of the way during this worthwhile journey to improve benefits for all Texas public education retirees. ★

## Myrtice Larson Celebrates 100th Birthday



TRTA wished a very Happy 100th Birthday to Myrtice Larson on May 15!

Myrtice served as President of the Arlington RSEA from 1987-1989,

District 11 President from 1989-1991,

TRTA State President from 1994-1996, and in 2006,

she was TRTA’s E.L. Galyean Service Award recipient.

Congratulations on reaching this amazing milestone,

Myrtice, and thank you for your many years of dedication and service to TRTA and your fellow TRS retirees.



# VIRTUAL ZOOM TO THE CAPITOL

During the week of April 5, TRTA hosted its first ever Virtual Zoom to the Capitol event! It was a huge success, with nearly 1,400 attendees, including 300 at-large members and 1,100 local unit members.

Our TRTA District Legislative Chairs hosted more than 120 meetings with Senators and Representatives during the week. We thank everyone who participated as well as those members who mailed in thousands of letters to their legislators for the TRTA Red Letter Campaign.







# PROFESSIONAL LIABILITY INSURANCE

FOR CERTAIN RETIREES RETURNING TO WORK



Professional Liability Insurance is exclusive to paid members (receiving an annuity from the Teacher Retirement System of Texas) of the Texas Retired Teachers Association (TRTA) who have returned to work in a public school district or public college/university either as a substitute teacher or in a full-time professional capacity other than administration and are subject to the exclusions of the policy.

You **MUST** receive your paycheck from an Independent School District, **NOT** from a third-party employer, to be eligible for this insurance, and you **MUST** be a paid TRTA member. The TRTA endorsed group professional liability plan with The John A. Barclay Agency, Inc. has an annual charge of \$39.00 per person.

All enrollments and payments go through TRTA. For policy information and exclusions, contact John A. Barclay, III, 512.374.4927.

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**Insurance Premium per Member \$35.00 + State Taxes & Fees \$1.72 + Association's Admin Fees \$2.28 = TOTAL \$39.00**

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The policy pays:

- ❖ Coverage A – \$1,000,000 per insured per occurrence/\$3,000,000 per occurrence
- ❖ Coverage B – \$5,000 per claim per insured subject to:
  1. \$1,000,000 annual aggregate for all claims.
  2. \$10,000 annual aggregate per insured under B(1) and/or B(5) combined.
- ❖ Coverage C – \$1,000 per bail bond per insured.

Effective date of individual's coverage begins on date TRTA receives application (within the coverage year August 1, 2021 through July 31, 2022). A policy summary will be sent to the participant after the application is processed.

Note: The duty of the insurer to defend extends even to the groundless, false and frivolous suits or accusations.



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## PROFESSIONAL LIABILITY INSURANCE FORM

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**Name**

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**Full Mailing Address**

---

**Email Address**

---

**Phone + Date/Year Retired (MM/DD/YY)**

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**Current Position Held (teacher, counselor, substitute, etc.)**

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**School District by which you are paid**

- ☐ I am a current TRTA member and wish to enroll in the professional liability insurance plan for the school year 2021–2022, and meet the above criteria. Enclosed is a check for \$39.00 (see itemization of charge above) made payable to TRTA.

Submit this form and a check made to TRTA: TRTA • 313 E. 12th Street, Suite 200 • Austin, TX 78701–1957

**EFFECTIVE GROUP POLICY DATE: AUGUST 1, 2021 – JULY 31, 2022**

SUMMARY OF COVERAGES ABOVE ARE PROVIDED FOR REFERENCE ONLY. ALL COVERAGE PROVIDED UNDER THE TERMS OF THE POLICY IN THE EVENT OF A LOSS OR OCCURRENCE IS SUBJECT TO THE EXCLUSIONS AND CONDITIONS CONTAINED IN THE MASTER POLICY ON FILE WITH THE POLICYHOLDER, INCLUDING ALL AMENDMENTS, ENDORSEMENTS, AND ADDITIONS.







## TEXAS RETIRED TEACHERS FOUNDATION

# OUTLOOK



LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

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Choose a date & translate it into a donation

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## TUTOR PROGRAM RECEIVES BOOST FROM LEGISLATIVE SESSION

The Texas Retired Teachers Foundation (TRTF) launched a highly ambitious, exciting new program in October 2020. The TRTF Tutor Program matches retired educators with students and families from across Texas. It provides critical assistance to students and active educators, many of whom are overwhelmed by overflowing class sizes and meager classroom resources.

The legislative session was very fruitful for the TRTF Tutor Program. SB 1356 allows TRTF to offer tutoring services directly to school districts. It's a significant step forward to help school districts by offering tutoring services through retired educators.

### WHAT IS THE TRTF TUTOR PROGRAM?

The TRTF Tutor Program is a virtual classroom hosted through a partner organization, Knack, which provides the platform that students and educators use to connect and communicate. Educators set up an online profile through the platform and post their qualifications. Students and families request tutoring in certain subjects, and educators are able to apply for the position. From there, educators are able to provide a virtual learning environment, including a digital whiteboard, text, and speech functionality.

Additionally, we are coordinating with the Texas Education Agency (TEA) and regional Education Service Centers to facilitate in-person, high impact tutoring on school campuses. We will have updates as we develop the protocol for these opportunities. The goal is to place tutors on campuses before, during, and after school who can work one-on-one with students to enhance learning outcomes and help them recover from pandemic learning loss.

### WHAT CAN I GET OUT OF THE TUTOR PROGRAM?

Retired Texas teachers may offer their services as tutors to students across the state using the Knack online platform. Because of their professional background as educators, retired teachers already possess the knowledge and skills needed to help students better grasp their materials. The TRTF Tutor Program is a pathway for retired educators to give back to their local communities. Tutors are eligible for compensation without risk of TRS return-to-work penalties.

### HOW DO I GET STARTED?

Please visit [www.trtf.org/tutor](http://www.trtf.org/tutor) to learn more about the program. If you are ready to register as a tutor, please visit [www.trtf.joinknack.com](http://www.trtf.joinknack.com).



# TRTF ANNOUNCES 2020 SCHOLARSHIP AND GRANT RECIPIENTS!

The Texas Retired Teachers Foundation (TRTF) is pleased to announce this year's Classroom Assistance Grant and Beginning Teacher Scholarship recipients. This year, TRTF awarded 48 grants, each worth \$500, to public school teachers for innovative classroom projects and learning platforms and 22 scholarships, each worth \$750, to recent college graduates. These graduates will begin their teaching careers in the fall. All scholarship recipients are referred by a member of TRTA. Congratulations to all of these hardworking educators! Learn more about them at [www.trtf.org](http://www.trtf.org).

## CLASSROOM ASSISTANCE GRANT RECIPIENTS

1. Abby Ford teaches Science and Technology at Elm Grove Elementary in Kingwood.
2. Amanda Moore teaches Math at Chisum Junior High in Paris.
3. Amber Prentice teaches Technology and Robotics at Buffalo Gap Elementary.
4. Amy Smith teaches Orchestra, Mariachi, and Percussion at Young Women's Leadership Academy in El Paso.
5. Bill Becker teaches Math at YES! Prep North Forest in Houston.
6. Brandy Cavness teaches Reading for dyslexia students at Brady Middle School.
7. Brent Ritchey teaches History and Social Studies at Dolph Briscoe Middle School in San Antonio.
8. Britney Haynes teaches Special Education at West Graves Early Learning Center in Port Arthur.
9. Caroline Bryson teaches Math, Science, and Social Studies at Navarro Elementary in Seguin.
10. Christina White teaches English at La Marque High School.
11. Corrine Thompson teaches Gifted and Talented at Mildred Junior High School in Corsicana.
12. Crystal Baker teaches Reading Intervention for dyslexia students at Koennecke Elementary in Seguin.
13. Dallena Nash teaches Gifted and Talented and Social Studies at Sloan Creek Intermediate in Fairview.
14. Debbie Hazelwood teaches Math and Science at Tibbals Elementary in Murphy.
15. Denise White teaches Reading, Language Arts, Writing, and Spelling to dyslexia students at Port Neches Elementary.
16. Evelyn Terry teaches all subjects to Pre-K students at Halpin ECC in Houston.
17. James Gaylord teaches Principles of Architecture at Summer Creek High School in Houston.
18. Jessica LaPete teaches Language Arts at Dolph Briscoe Middle School in San Antonio.
19. Johnie Flores teaches Pre-K through second grade students at YES! Prep North Forest Elementary in Houston.
20. Kambri Cowey teaches all subjects to third grade students at Jefferson Elementary in Seguin.
21. Kathryn Hiatt teaches Math and Science at Hunt Elementary in Cuero.
22. Kaye Cooper teaches all subjects to Pre-K students at Aaron Parker Elementary in Powderly along with fellow applicants Christine Rian and Erin Harkey.
23. Kelly Taylor teaches Reading at Milano Junior High.
24. Laci Carter teaches English as a second language and Social Studies at Port Neches Elementary.
25. Laura Clark teaches Forensic Science at Turner College and Career High School in Pearland.
26. Leslie Kuch teaches Math and Social Studies at Rains Elementary School in Emory.
27. Liliana Garcia teaches Essential Academics and Activities of Daily Living to students with disabilities at Seguin High School along with her colleagues Cailey Donahoe and Andrea Taylor.
28. Lisbeth Santisteban teaches all subjects to Pre-K students at Langford Elementary in Austin.
29. Loura Salazar teaches Life Skills at Taft Elementary in Port Arthur.
30. Mark Keddal teaches English and Social Studies at Seguin High School.
31. Misty Martinez teaches Instrumental and Choir Music at Carpenter Hill Elementary in Buda.
32. Molly Kacal teaches Early Childhood and Special Education at Belton Early Childhood School.
33. Mong Tran teaches Reading, ELA, Math, Science, and Social Studies at Taft Elementary in Port Arthur.
34. Morgan Weeks-Boyer teaches all subjects at Navarro Elementary in Seguin.
35. Noemy Talamantes is the Attendance Clerk at Blanton Elementary in Austin.





36. Paula Richard teaches Social Studies at Vincent Middle School in Beaumont.
37. Raja Donawho teaches third grade, all subjects at Houston Elementary School in Mineral Wells.
38. Risa Zizmont teaches all subjects to second graders at Ridgewood Elementary in Port Neches.
39. Robert Barbosa teaches Special Topics in Social Studies at Sharyland High School in Mission.
40. Samantha Keaton (pictured) teaches Social Studies and High School Leadership at Young Women's Leadership Academy in Fort Worth.
41. Samantha Palacios teaches Extreme Reading to dyslexia students at Jim Barnes Middle School in Seguin.
42. Sara Hansen teaches Health Science at Atascocita High School in Humble.
43. Sarah Klesel teaches STEM Lab at McQueeney Elementary School.
44. Sharen Underwood is a Librarian at La Vega Primary School Phil Bancale Campus in Waco.
45. Stephanie Adams teaches Reading and Writing at Navarro Elementary in Seguin.
46. Tanya Webb teaches Math, Science, and Social Studies at Navarro Elementary in Seguin.
47. Traci Jones teaches Music at Vogel Elementary in Seguin.
48. Wendy Morgan teaches Science at Milano Junior High.



## BEGINNING TEACHER SCHOLARSHIP RECIPIENTS

1. Connie Pettitt (University of Houston-Victoria), referred by TRTF Trustee, Brenda Ritter of Katy.
2. Daniella Renee Puente (Sam Houston University), referred by Melissa Lee of Humble.
3. Davette Brannon-Ward (University of Phoenix), referred by Patricia Boren of Dallas.
4. Heather Barron (University of Phoenix), referred by Susan Burroughs of Porter.
5. Jamey Germany (Texas Tech University), referred by Tommy Hays of Fritch.
6. Kacey Bailey Garcia (Texas Tech University), referred by Martha Turney of Slaton.
7. Katie Cummings (Texas A&M University), referred by Jan Miller of Corsicana.
8. Katie Rydell (Southwestern University), referred by Darlene Rydell of Taylor.
9. Kristina Coronado (UT-Rio Grande Valley), referred by Sylvia Perez of Brownsville.
10. Laine Gomes Cornish (IAG/PUC Rio), referred by Mary Helen Cornish of Allen.
11. Macey Waid (Texas Tech University), referred by Peggy Waid of Denton.
12. Mackenzie Hill (Texas A&M-Commerce), referred by Kimberley Boswell of Barry.
13. Madelyn Pipes (Texas A&M University-Texarkana), referred by Kerry James of Texarkana.
14. Madison Cooley (East Texas Baptist University), referred by Carol Cooley of Mesquite.
15. Madison Jan (University of Houston), referred by TRTF Trustee, Carla Meuth of Rosenberg.
16. Melissa Edgar (Lubbock Christian University), referred by Dennis Hargrove of Lubbock.
17. Michele Schmidt (Our Lady of the Lake University), referred by Mary Lou Purello of Kingwood.
18. Ryan O'Bryant (University of San Francisco), referred by Carol Frosch of Bryan.
19. Rylee Morrow (University of Houston-Victoria), referred by Doris Anandel of Edna.
20. Sara Heinrichs (Howard Payne University), referred by Kathryn Heinrichs of Hico.
21. Sarah Mansfield (Texas Tech University), referred by Peggy Waid of Denton.
22. Therese Cosgray (Texas A&M University), referred by TRTF Trustee, Brenda Ritter of Katy.



*The* **VOICE**

Send address changes to:  
Texas Retired Teachers Association  
313 E. 12th Street, Suite 200 | Austin, TX 78701-1957  
1.800.880.1650 | [www.trta.org](http://www.trta.org)

## TRTF DONATE YOUR DATE

On March 22, TRTF launched its first ever Donate Your Date fundraiser! So far, members of TRTA have donated more than \$51,000 to help fund our charitable programs benefitting educators of the past, present, and future!

The idea of the fundraiser is to choose a date that is meaningful to you, then translate that date into a donation amount. For example, is your wedding anniversary on February 14? Consider donating \$2.14, \$21.40, or \$214! Other great examples include donating based on a loved one's birthday, the day you retired, or even the day you joined TRTA.

Maybe someone you love received the great news they beat cancer on June 8, 2014, and you would like to honor them by giving \$68.14! Any amount will be a tremendous help to TRTF as we strive to fund our important programs, such as "A Helping Hand," the Disaster Relief Fund, the TRTF Tutor Program, and more!

### HOW TO DONATE YOUR DATE!

1. Make a donation online at [www.trtf.org/donateyourdate!](http://www.trtf.org/donateyourdate!) Prefer snail mail? Please visit the site and download the special donation form and mail to TRTF, Attn: Donate Your Date, 313 E. 12th Street, Suite 220, Austin, TX 78701
2. Email your story of why you chose this special date to [help@trtf.org](mailto:help@trtf.org) (feel free to include a photo or short video). TRTF will share Donate Your Date stories on the TRTA Facebook page and app throughout the spring and until the campaign ends in June 2021.



**Canyon Lake Retired Teachers (pictured above) donated \$198.10 to honor the year (1981) their unit was founded!**

TEXAS RETIRED TEACHERS FOUNDATION

# OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

## TEXAS RETIRED TEACHERS FOUNDATION



**I WANT TO  
HELP!**

**DONATION  
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DONATIONS ARE  
TAX DEDUCTIBLE

PLEASE ACCEPT MY DONATION OF:

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IN MEMORY OF:

IN HONOR OF:

NAME

ADDRESS

CITY

STATE

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☐ SAVE TRTF A STAMP AND EMAIL ACKNOWLEDGEMENT TO:

Donations are tax deductible. Enclose a check, completed donation card and send to:  
Texas Retired Teachers Foundation • 313 E. 12th St., Ste. 220 • Austin, TX 78701-1957

