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# *The* VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

## TRS-CARE IS IN TROUBLE! How We Can Save It

**By Tim Lee  
Executive Director**

Since our first 2014 headline, the Texas Retired Teachers Association (TRTA) has been alerting members to a burgeoning crisis. TRS-Care, the health care system more than 240,000 retired educators rely upon, is facing a massive budget shortfall.

The shortfall was projected earlier this year to be as high as \$1 billion. As of November, the shortfall projection is closer to \$730 million. While the introduction of Medicare Advantage and slightly higher forecasted teacher payrolls have helped TRS-Care save money, the budget remains a true crisis, and one that must be addressed by the 2015 Texas Legislature if retirees expect to keep their access to affordable health care.

If the Legislature does nothing or chooses not to provide additional funding, there will be only one alternative: double retiree premiums or cut health care benefits by \$730 million.

**This is unacceptable to TRTA!**



CONTINUED ON NEXT PAGE

# TRS-CARE IS IN TROUBLE! HOW WE CAN SAVE IT

Retirees live on fixed, modest incomes. The 3 percent cost-of-living increase retirees received last year, the first of its kind in 12 years, will not offset the drastic premium increases that may be necessary if the Legislature does not take action. Furthermore, not every Teacher Retirement System retiree received the 3 percent cost-of-living increase, exacerbating the impact premium increases could have on the retired educator community.

## Immediate Action Needed This Session

In a letter written to the Legislative Budget Board earlier this year, TRTA expressed alarm for the 240,000 TRS-Care participants whose premiums could significantly increase. Many of these participants have been paying into TRS-Care for decades, long before they retired!

Retirees provide TRS-Care's largest funding portion, more than 31 percent. The average retiree receives \$1,900 in income each month. The retired educator community cannot absorb large premium increases or massive benefit reductions.

**Two facets must be considered: the immediate need for increased appropriations to make the plan solvent in the coming biennium, and the implementation of long-term solutions to avoid future TRS-Care crises.**

While it is impossible to predict how the Legislature ultimately will react to this crisis, TRTA is firmly against placing the shortfall's entire burden onto our public education retirees.

TRTA supports funding the state's statutory 1 percent requirement, as well as fulfilling the TRS supplemental request of \$875 million, preferably from the state's general revenue fund.

TRTA is not opposed to supporting supplemental appropriations with resources from the Rainy Day Fund; however, many legislators view the use of Rainy Day Fund dollars as one-time expenditures not to be used for ongoing state budget needs. Other legislators may not want to use the Rainy Day Fund at all.

At best, the use of the Rainy Day Fund may be a viable temporary solution to the TRS-Care crisis, and this is a problem in desperate need of a long-term solution. If the Legislature doesn't adopt a long-term solution to TRS-Care funding, we will be back next session requesting an even higher supplemental appropriation.

Use of the Rainy Day Fund could yield a long-term solution if the Legislature chooses to pre-fund retiree health care, and TRTA supports pre-funding TRS-Care. The option, though, is costly and may use more of the Rainy Day Fund than the Legislature is willing to appropriate.

**Solving the TRS-Care Crisis** The state's funding basis for TRS-Care, which isn't tied to the program's actual cost, is the real issue that must be addressed. The methodology of sustaining TRS-Care based on educator payroll is flawed. The revenue growth for TRS-Care is limited by the slow rise in educator payroll. TRS administers a quality health care system, but relies upon a revenue stream incapable of keeping pace with medical cost inflation.

In the 2015 Texas Legislature, lawmakers must question whether the state is paying a reasonable cost for employee and retiree benefits. TRTA believes the state has efficiently supported the retirement system, but has underfunded TRS-Care for years. We have implemented temporary saving measures to maintain this vital program, but these measures have all been exhausted.

Now is the time for the Texas Legislature to revitalize its commitment to TRS-Care. Anything less than adequate funding for TRS-Care will expedite a move towards the program's disaster. The thought of undermining our state education retirement security should be unacceptable to every legislator!

TRS-Care requires significant changes to ensure its future viability. Retirees are already paying the highest percentage into the program, and may soon no longer be able to afford adequate health care.

**Texas ranks dead last among all states in its appropriation of funds for its public education workforces' benefits.** The Legislature must recognize the underfunding of our Texas public school workforce that has led to the TRS-Care crisis.

TRTA is committed to working with the Legislature to devise long-term solutions that are fair and equitable.

## MEMBER CALL TO ACTION

1. Use page 3 to write a letter to your legislator. (Page 4 provides a TRS-Care fact sheet). Let them know why TRS-Care is important to you and ask them to work with TRTA this session! Mail your letter to TRTA and we will hand deliver it for you! If you prefer email, sign up for the *Inside Line* ([www.trta.org](http://www.trta.org)) to receive action alerts (including the personal letter option).
2. Mail the letter to: TRTA, Attn: TRS-Care, 313 E. 12th Street, Suite 200, Austin, TX 78701
3. Ask someone to join TRTA. Membership is our ultimate power. As we grow, so does our ability to solve problems like the TRS-Care crisis. Together we can rise up and meet these challenges together. Please ask a friend, colleague, family member or even your legislator to join TRTA! Membership matters and we need you!

**CONTINUED ON PAGE 5**



Dear Texas Legislator,

During the 83rd Legislative Session, we proved that when we work together great things are possible. Now, Texas public education retirees are facing a terrible crisis with TRS–Care, our health care program.

Retiree premiums for this program may double, benefits could be drastically reduced, and retirees’ ability to afford this vital program are all probable if we do not solve the TRS–Care crisis in 2015. On the back of this page are a few charts and some quick facts about the TRS–Care program. Below is a personal letter from me about how vital TRS–Care is to my retirement security.

As you know, I paid into TRS–Care as an active employee. Active school employees and school districts still pay into TRS–Care to support the program’s needed revenue expectations. Today, I pay my premium and other out–of–pocket costs. Did you know that retiree premiums and other out–of–pocket costs make up more than 31% of the revenue for TRS–Care? TRS–Care participants and active school employees already are paying a fair share of their health care costs.

What we need is a greater state budget commitment for this vital health care program. I need you to help me and the thousands of other retired school employee constituents and TRS–Care participants in your district! We must be able to afford TRS–Care and we do not want our benefits slashed!

Please work with the Texas Retired Teachers Association (TRTA) and its legislative team to save TRS–Care and develop a long–term plan so that retirees do not have to fear losing their vital health care benefits.

Remember, my personal letter is below. Thank you for your service in the Texas Legislature and for representing me on this important issue.

Yours,

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TRTA Member Name _____
Address _____
City, State, Zip Code _____

## WHAT WE NEED:

Quality health care at an affordable cost, higher state appropriation for TRS-Care.

### EXPENDITURES FOR FISCAL YEAR 2014:

Medical  
 \$663,776,623  
 52%

Drug  
 \$539,842,962  
 42%

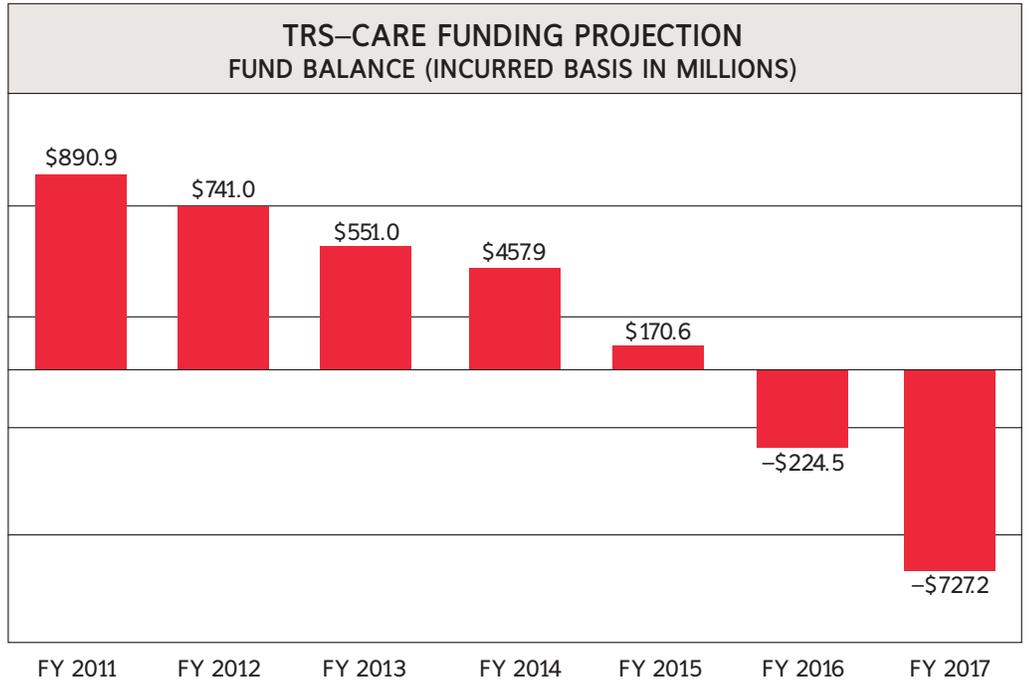
Medicare Advantage  
 \$27,507,107  
 2%

Administrative  
 \$48,894,894  
 4%

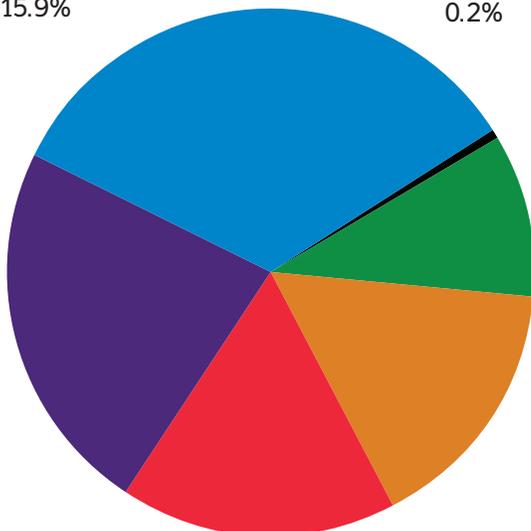
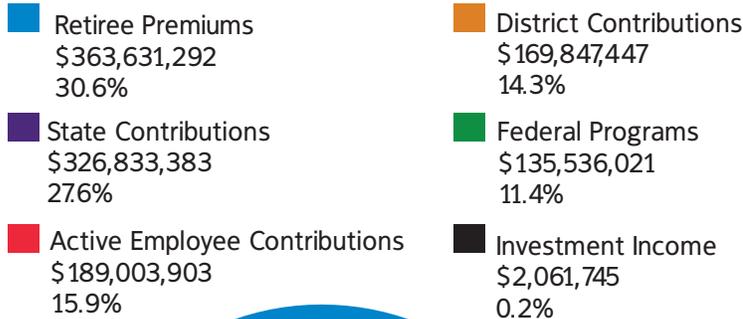
Total Expenses  
 \$1,280,021,586  
 100%

Expenses in Excess of Income  
 \$93,107,795

### TRS-CARE FUNDING PROJECTION FUND BALANCE (INCURRED BASIS IN MILLIONS)



### TRS-CARE FUNDING FY 2014 PIE CHART



### MONTHLY FUNDING SUPPLEMENTING RETIREE COSTS

State (0.5%)	\$100
State Settlement	\$12
Active Members (0.65%)	\$65
District Contributions (0.55%)	\$59
Investment Income	\$1
Federal Subsidy	\$47
<b>Total Monthly Income Per Retiree</b>	<b>\$284</b>

The Legislature will make tough choices to balance the needs of all stakeholders. Our retirees have also made tough choices. Choosing between health care and basic survival should not be a choice our retirees have to make.

## **Multiple options, few realistic solutions**

For more than 10 years, TRTA has asked the Legislature to increase TRS-Care funding. The TRS-Care Sustainability Study provides numerous options for the Legislature to consider. Some of the study's options are stand-alone solutions. Other options propose a more cost-effective program, and some proposals are completely unreasonable and should not be supported.

TRS cannot lobby for a proposed solution, as the organization is prohibited by law from advocating any position related to retirement benefits. TRS simply provides the data. TRTA and the active educator community must work together to push the Legislature towards a solution.

The entire TRS-Care sustainability study containing the aforementioned options is available on the TRTA website. Please take some time to review the study and the various options being considered by the Legislature.

**It's Time to Make a Stand** The TRS-Care Sustainability Study provides numerous complex ideas, concepts, funding scenarios and proposals. TRTA's core values should guide the Legislature and our advocacy efforts in the coming session.

**1. TRS-Care is a vital program for our state public education retirees.** It is a program valued by its participants and necessary in preserving educator's retirement security. No TRS-Care participant—current or future—should fear losing his or her health care program.

**2. TRS-Care must be affordable and provide reasonable benefits.** Retirees are paying 31 percent of the program's total costs, including premiums, deductibles, co-pays and other out-of-pocket costs. Doubling retirees' premiums is not a realistic solution and shouldn't even be considered. Similarly, TRS-Care must provide a quality level of care. Cutting benefits is a seriously flawed attempt at "fixing" TRS-Care.

**3. The current funding system presents a perpetual, ever increasing funding crisis, and is not reasonable to maintain this vital health care program.** TRS-Care's chronic underfunding hasn't been addressed in over a decade. Real solutions must be long-term or retirees could lose their health care, absorb huge premium increases and experience drastic benefit cuts in every foreseeable future legislative session. Our public education retirees, who have served this state and our schools, should not be under the constant threat of losing their health care benefits.

**TRTA's Recommendation** TRTA will work on this issue until it is fully resolved and our retirees' access to affordable health care with quality benefits is assured. TRTA proposes the following for the coming legislative session:

1. Fund the current shortfall and protect retiree premiums from skyrocketing next biennium.
2. Work with the stakeholders on a minimum 10-year funding plan. Develop an appropriations plan that puts the state on track to fund retiree as well as active school employee health care adequately.
3. Maintain established plans for adequately funding the TRS pension plan (without invalidating the work from last session or undoing any aspect of Senate Bill 1458) to ensure its long-term actuarial soundness and preserve the defined benefit for all future TRS retirees.

**TRTA members, this is our official call to action. We need you. We need your friends, family, school employee colleagues and fellow retirees to join TRTA and help us fight!**

TRS-Care has worked for nearly 30 years. You invested in this plan as active school employees and school district employers. We must defend TRS-Care's long-term health by working with our elected leaders. Current and future retirees are counting on our efforts this session!

Many legislators may not know that TRS-Care is not a free ride. Retirees, active employees, school districts and the state have partnered to create this very successful program. Legislators need to be educated that retirees already pay the largest portion for their health care.

TRTA members, now is the time to lead. We must stand up for each other and those yet to retire. We must be fully committed, unwavering in our positions, unyielding in our education and advocacy efforts and attack this issue with the fervor that only TRTA members can muster!

The stakes could not be any higher. TRTA leaders, staff members and advocacy partners will be fully engaged this session. Can we count on you? Will you help turn the tide in favor of TRS-Care and for all current and future TRS retirees? Start today! Send in your TRS-Care letter to TRTA (instructions provided on page 2).

Most importantly, we must focus on winning this issue! TRTA will not rest until this crisis, as well as a host of other TRTA legislative goals, reaches a positive solution. Let's all come together and prove to the Texas Legislature that the most active, sincere and helpful group in the state is the Texas Retired Teachers Association! ★

# ★ PUBLIC RELATIONS UPDATE



Welcome and bienvenidos to the 2014-2015 TRTA year! This year, the Public Relations Committee is working hard to encourage districts and local units to make TRTA a household name for all TRS retirees and active educators using various media and social networks such as web pages, Facebook and Twitter.

Congratulations to all of our districts for creating informative web pages that inspire new retirees to join TRTA! A major goal is to have 100% of the districts create and update their web pages, and we are already at 85%! Short videos are available to guide both districts and local units in the creation and maintenance of their web pages. We are encouraging District Presidents to recognize local units that have active web pages at their Spring Leadership Conference.

We encourage districts and local units to become more visible by submitting articles to news media highlighting our members' and units' community involvement and activities. We have updated a sample letter to the editor to reflect our concern about the TRS-Care health insurance crisis and help the public become aware of what is coming in the 84th Legislative Session.

The very important Children's Book Project continues to put thousands of books into the hands of children across the state. We are encouraging all local units to work together as we strive for 100% participation. Together we can have every local unit putting books into the hands of children across the big state of Texas!

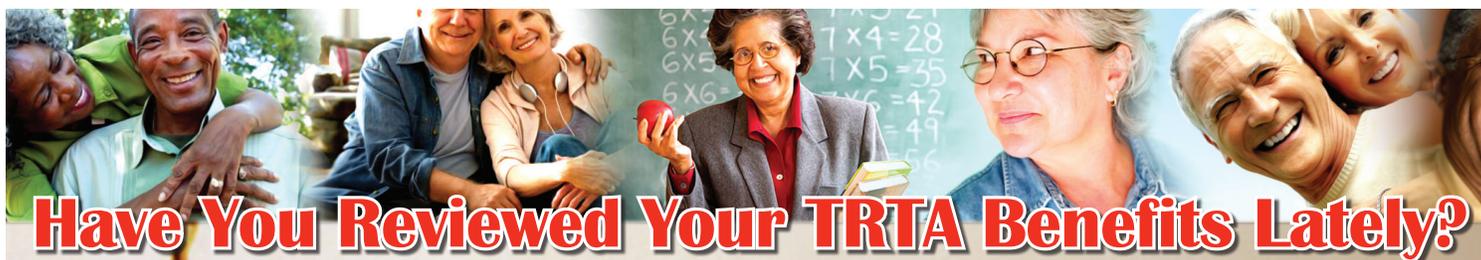
Public Relations means relating to the public who and what TRTA represents, therefore, we encourage everyone to promote TRTA's mission and vision! Public Relations Committee members: Pat Macias, Chairman (2), Terri Navrkal (17), Teddie Poindexter (16), LaWynn Rogers (10), and Sally Soderstrom (19).

Patricia Macias

2014-2016 TRTA Second Vice-President/Public Relations Committee Chairman

## TRTA AWARDS PROGRAM

All awards—both at the district and local unit levels—are self-nominated. TRTA Awards Program packets and templates will be emailed in December to district and local unit presidents. All awards must be prepared by districts and local units.



## Have You Reviewed Your TRTA Benefits Lately?

### TRTA Members Have Access To:

- Dental & Vision Plans at Group Rates
- Long Term Care Policy
- Tax Deferred Annuity
- Medicare Supplement Plans
- Discounted Travel Accommodations
- Emergency Air & Ground Transportation

And many, many, more!

To learn more, call 800.258.7041 or visit:

[www.myAMBAbenefits.info/trta](http://www.myAMBAbenefits.info/trta)

Benefits made available through



# Introducing TRTA TV!

If you are a subscriber to the *Inside Line*, you may have noticed a recent addition. Small black boxes are appearing at the top of our emails, accompanied by phrases like “click here” or “share this.” So just what are these boxes, and why are they in TRTA’s newsletters, Facebook posts and websites?

Like many growing non-profit organizations, TRTA has expanded our communications department’s content to include online videos. Video implementation is an increasingly common method of spreading messages on the Internet. When you hear about a video “going viral,” it doesn’t mean watching the video will crash your computer. It means the video is so popular that millions of people have viewed it! Here at TRTA, we aren’t looking to go viral, but we are seeking to achieve four main goals.

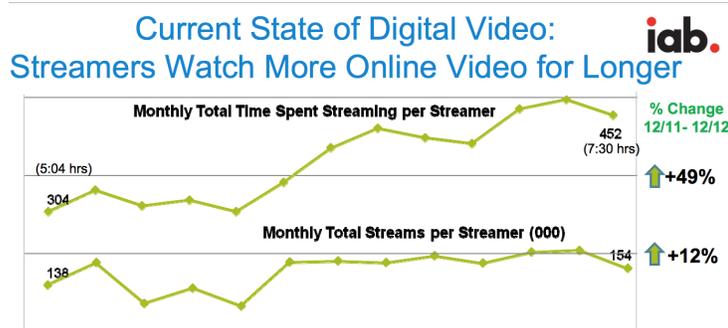
## To Better Inform Our Members

TRTA’s first and foremost priority is to fight for the rights of public educators’ pensions and health care. Educators are the backbone of Texas and our nation. To protect your retirement benefits, we need to be organized and educated.

Lawmakers are elected to represent our best interests, and their decisions are most heavily impacted by their constituents’ opinions. Having an organized and educated voter base gives us the ability to influence legislation and help get bills passed.

Online videos create memorable, informative messages that can be easily spread throughout an entire community. Our videos seek to tell the story of how lawmakers’ decisions are affecting educators.

Online content is outperforming older forms of media. More than 6 billion hours of video are watched on YouTube each month! According to a 2012 Nielsen study, online viewers spent 49% more time watching digital shows than the previous year while TV viewership remained flat. People aren’t just going online for entertainment. They are foregoing newspapers to read news online. The Pew Research Center in 2008 said, “For the first time in a Pew survey, more people say they rely mostly on the internet for news than cite newspapers.”



As the largest retired teacher organization in the country, we must utilize the most effective means of communicating with our members. Online video is paramount to reaching not only the current generation of retirees but future ones as well.

## To Entertain Audiences

Legislation and political agendas might seem like the wrong forum for entertainment, but studies have shown information



can be made all the more memorable when presented in an entertaining format.

In a 1994 study, experimenters had their subjects read two different types of text. One type of text was purely informational and the other was presented in the form of a story. Subjects who read the stories not

only finished reading faster, they remembered 50% more than the subjects who read expository passages.

Reading legislative documents can be tedious. We hope to use our videos to provide you with timely information that inspires you and spurs you to action!

By creating videos that are both informative and entertaining, we are more likely to catch the eyes of pre-retirees. Our content can be shared with both active and retired educators.

## To Share Our Message

Non-profit organizations of every shape, size and means are sharing their stories through online video and social media.

The ALS Association recently ran a viral video campaign known as the “Ice Bucket Challenge” that generated more than \$100 million in donations in just one month! ALS challenged people to either upload videos of ice water being dumped on them or donate. The campaign was made possible by the ease and affordability in which a person can share a video online.



As a retiree, you have an important message that needs to be heard! Your benefits are being attacked, and your fellow retirees need to know how they can help. Online video amplifies your message!

## To Cut Paper Costs

Shipping costs are expensive and prices are only increasing. When you become a member of TRTA, you are entrusting us to use your membership funds in the most effective way to protect your retirement benefits. Creating video content is far less expensive than producing and shipping thousands of pages across the state.

While your news bulletins are already available online, TRTA is developing a version for members who would prefer to receive an email subscription. In the meantime, we are adding to the important news content that you have come to expect via video updates.

So the next time you see a black box on our newsletter, Facebook page or website, give it a click! By watching and sharing our videos with your fellow retirees, you are creating a better informed and more powerful educator community. ❏

By Cindee Sharp and Roy Varney

# 62nd TRTA Annual Convention: Jazz it up with TRTA!

## Convention Schedule

### MONDAY, APRIL 6, 2015

11:00 a.m. – 5:30 p.m.

Delegate Certification

Registration

Exhibits

1:00 p.m. – 2:00 p.m.

TRTA Officers Meeting

2:00 p.m. – 3:30 p.m.

TRTA Board of Directors Meeting

3:30 p.m. – 4:30 p.m.

DP Meeting

Foundation Trustees

Facilitators Meeting

6:30 p.m.

Welcome/Awards Dinner

### TUESDAY, APRIL 7, 2015

7:00 a.m. – 8:15 a.m.

Foundation Breakfast

7:00 a.m. – 12:00 p.m.

Delegate Certification

Registration

Exhibits

8:30 a.m. – 12:00 p.m.

Breakout Sessions I, II & III

12:15 p.m.

Legislative Luncheon

1:30 p.m. – 2:15 p.m.

Caucus Meetings

2:30 p.m. – TBD

House of Delegates

TBD

TRTA Board of Directors

Dinner on your own

## Day at the Capitol Schedule

### WEDNESDAY, APRIL 8, 2015

8:00 a.m. – 9:00 a.m.

Legislative Visits

9:30 a.m.

House Gallery

10:00 a.m. – 2:00 p.m.

Photo opportunities with Legislators

10:30 a.m.

Senate Gallery

11:30 a.m.

Rally on East Lawn

12:00 p.m.

Additional Legislative Visits

12:00 p.m. – 2:30 p.m.

Ice Cream Social



Registration is now open for the 62nd TRTA Annual Convention to be held in Austin, Texas April 6-8, 2015! This year's theme is Jazz it up with TRTA, a perfect sentiment that matches the city's musical reputation and sparks excitement for this unique and enlightening event!

The convention will be held at the JW Marriott on 110 E. 2nd Street. The hotel is now taking reservations. The group rate of \$169 (+ tax) per night is good through March 16, 2015, but rooms are filling quickly! Please note the group rate is also available for April 5.

Call 1.888.236.2427 and be sure to ask for the "Texas Retired Teachers Association 62nd Annual Convention" group rate! For online hotel reservations, please visit the home page of the TRTA website ([www.trta.org](http://www.trta.org)).

There is no better time to be in Austin! The Texas Legislature will be in regular session, discussing such vital issues as the TRS-Care health insurance program and ways to protect the longevity of benefits for our public education retirees and pre-retirees.

TRTA has released a tentative schedule of events to help you plan your travel. Due to the Easter holiday on April 5, convention activities will begin later in the day on April 6, allowing members to travel in the morning and still arrive in time for registration. Unlike years past, there will be no banquet, and instead members may attend a welcome dinner on the first night.

Day two (April 7) begins with the Foundation Breakfast. Previously, TRTF held a luncheon. Though the format will be somewhat different, members will still be able to present

gifts to the Foundation in honor or in memory of a loved one, friend or colleague.

Training sessions and the House of Delegates fill the second day. A legislative luncheon will be held at 12:15 p.m. At the conclusion of the House of Delegates, attendees will be able to choose from a wide variety of restaurants within walking distance of the hotel in wonderfully diverse downtown Austin for dinner.

The length of the convention will be truncated, allowing for a full day of legislative grassroots advocacy on Wednesday, April 8! Our "Day at the Capitol" event is open to all attendees as well as any member who wishes to travel to Austin for this purpose only.

The Day at the Capitol allows public education retirees to visit with their legislators, be honored by both the Texas Senate and House and enjoy a rousing speech by TRTA officers and elected officials on the Capitol grounds. All attendees at this event are encouraged to wear red!

Please note, a RSVP is required for the Day at the Capitol event even if you do not plan to attend the Convention. Your RSVP ensures that enough advocacy materials and refreshments are available for all attendees. Please check the appropriate box on the registration form if you are attending on April 8.

Look for the registration form for all events, including meal prices, on page 9 or register online at [www.trta.org](http://www.trta.org). Registration for the Convention and Day at the Capitol closes March 16, 2015. We hope you will join us in Austin in April for convention, Day at the Capitol, or both and Jazz it up with TRTA! 

# CONVENTION REGISTRATION FORM

**REGISTRATION DEADLINE: MARCH 16, 2015**



## REGISTRANT INFORMATION

Last and First Name		TRTA ID	
Address			
City		State	Zip
Phone	Email for Confirmation		

## CONVENTION INFORMATION

Every convention attendee must register online or by mail. One registrant per form. Please check all boxes that apply. Attendees must pay the \$30 registration fee or \$35 on-site registration (late) fee. Refund requests must be received by March 31, 2015. Refunds will be processed after Convention by April 30, 2015. A \$10 service charge will apply. Register online at [www.trta.org](http://www.trta.org) or mail completed form and payment to TRTA, Attention: Convention, 313 E. 12th Street, Suite 200, Austin, TX 78701.

## SPECIAL EVENTS

<input type="checkbox"/> Registration (Deadline March 16, 2015) \$30 per person	\$ _____
<input type="checkbox"/> Welcome and Awards Dinner (Monday, April 6, 2015 • 6:30 p.m.) \$55 per person	\$ _____
<input type="checkbox"/> Foundation Breakfast (Tuesday, April 7, 2015 • 7 a.m.) \$30 per person	\$ _____
<input type="checkbox"/> Legislative Luncheon (Tuesday, April 7, 2015 • 12:15 p.m.) \$40 per person	\$ _____

Day at the Capitol (Wednesday, April 8, 2014 • 8 a.m.–2:30 p.m.) Complimentary

I will be attending the Day at the Capitol

## PAYMENT INFORMATION

A confirmation letter will be emailed/mailed prior to convention.

Check or money order enclosed payable to TRTA

Please charge my credit card

**TOTAL REMITTANCE**

\$ \_\_\_\_\_

▼ Credit Card Number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-	<input type="text"/>					
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▼ Expiration

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▼ Signature

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# 2014-2015 District Presidents

2014-2015 District Presidents (image below not in district order): Patricia Shupe (District 1), Paula Stone (District 2), Carolyn Hale (District 3), Marcy Cann (District 4), R. A. Hidalgo (District 5), Jamie Larson (District 6), Penny McDonald (District 7), Mary Nell Short (District 8), Dale Thomas (District 9), Nolita Johnson (District 10), Jack Knowles (District 11), Stephen Caruso (District 12), Kathleen Elbel (District 13), Robert (Bob) Gillette (District 14), Lynn Granzin (District 15), Tommy Hayes (District 16), June Cooper (District 17), Wayne Smith (District 18), Norma K. Irwin (District 19, not present) Ron Leiman (representing District 19), Charlotte Travis, Ph. D. (District 20).



## TRTA Welcomes New Staff Member

Shala Rodriguez joined TRTA on November 3 as our new Executive Assistant. Shala has over 17 years of administrative office experience working within several industries including telecom and real estate, and most recently worked for the Texas Association of Realtors. She has also worked for political action committees in Texas and has served on committees such as the Texas Book Festival and Literacy Austin.



Shala holds a bachelor's degree in sociology with an emphasis in social issues from the University of Northern Colorado. She also has a digital design degree from the Art Institute of Pittsburgh.

Shala is a native of Colorado and comes from a military family. Her older sister is a Lieutenant Colonel stationed at Hickam Air Force Base in Oahu, Hawaii. She has one brother and another sister who still reside in Colorado with their families.

Shala moved to Texas in 2004 with her son Elijah to be closer to her parents. She currently resides in Buda just south of Austin. Please take an opportunity to welcome Shala to the TRTA family! You may reach her by calling 800.880.1650 ext. 102 or by emailing her at shala@trta.org.

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10. Owner (Do not leave blank. If the publication is owned by a corporation, give the name and address of the corporation immediately followed by the names and addresses of all stockholders owning or holding 1 percent or more of the total amount of stock. If not owned by a corporation, give the names and addresses of the individual owners. If owned by a partnership or other unincorporated firm, give its name and address as well as those of each individual owner. If the publication is published by a nonprofit organization, give its name and address.)

Full Name: Texas Retired Teachers Association Complete Mailing Address: 313 E. 12th Street, Suite 200 Austin, TX 78701

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The purpose, function, and nonprofit status of this organization and the exempt status for federal income tax purposes:

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PS Form 3526, July 2014 (Page 1 of 4 (see instructions page 4)) PSN: 7530-01-000-9931 PRIVACY NOTICE: See our privacy policy on www.usps.com

13. Publication Title		14. Issue Date for Circulation Data Below	
VOICE (THE)		07/01/2014	
15. Extent and Nature of Circulation		Average No. Copies Each Issue During Preceding 12 Months	No. Copies of Single Issue Published Nearest to Filing Date
a. Total Number of Copies (Net press run)		92,750	100,175
b. Paid Circulation (By Mail and Outside the Mail)	(1) Mailed Outside-County Paid Subscriptions Stated on PS Form 3541 (Include paid distribution above nominal rate, advertiser's proof copies, and exchange copies)	90,932	99,798
	(2) Mailed In-County Paid Subscriptions Stated on PS Form 3541 (Include paid distribution above nominal rate, advertiser's proof copies, and exchange copies)		
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d. Free or Nominal Rate Distribution (By Mail and Outside the Mail)	(1) Free or Nominal Rate Outside-County Copies Included on PS Form 3541	268	0
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	(4) Free or Nominal Rate Distribution Outside the Mail (Carriers or other means)		276
e. Total Free or Nominal Rate Distribution (Sum of 15d (1), (2), (3) and (4))		268	0
f. Total Distribution (Sum of 15c and 15e)		91,200	100,074
g. Copies not Distributed (See Instructions to Publishers #4 (page #3))		1,550	101
h. Total (Sum of 15f and g)		92,750	100,175
i. Percent Paid (15c divided by 15f times 100)		99.70%	99.72%

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**Statement of Ownership, Management, and Circulation**

16. Electronic Copy Circulation

	Average No. Copies Each Issue During Preceding 12 Months	No. Copies of Single Issue Published Nearest to Filing Date
a. Paid Electronic Copies	0	0
b. Total Paid Print Copies (Line 15c) + Paid Electronic Copies (Line 16a)	90,932	99,798
c. Total Print Distribution (Line 15f) + Paid Electronic Copies (Line 16a)	91,200	100,074
d. Percent Paid (Both Print & Electronic Copies) (16b divided by 16c × 100)	99.7%	99.7%

I certify that 50% of all my distributed copies (electronic and print) are paid above a nominal price.

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in the December, 2014 issue of this publication.

18. Signature and Title of Editor, Publisher, Business Manager, or Owner

Bobbie Pearson, Deputy Director

Date: 09/17/2014

I certify that all information furnished on this form is true and complete. I understand that anyone who furnishes false or misleading information on this form or who omits material or information requested on the form may be subject to criminal sanctions (including fines and imprisonment) and/or civil sanctions (including civil penalties).

# OUTLOOK



## LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

### 2014 ANNUAL APPEAL UPDATE

TRTF Raises Nearly \$30,000 So Far!

11

### TRTF SCHOLARSHIPS & GRANTS

Applications now available!

12

### DONATE TODAY!

Donation card on the back of *The VOICE*

12

## THANK YOU FOR HELPING US CONNECT GENERATIONS OF EDUCATORS!

TRTF thanks our members and friends for their generous contributions and overwhelming support! Because of you, TRTF has raised \$30,000 since November 1.

***We are only \$70,000 away from meeting our goal of raising \$100,000!***

TRTA generously provided space in the previous issue of *The VOICE* to TRTF for our annual appeal letter and a four-page article about our four charitable programs: "A Helping Hand," Student Scholarships, Classroom Assistance Grants, and the Legacy Campaign. Thank you for reading and sharing the stories of those we have helped.

Numerous donations have been received from districts, local units and individuals to support educators of the past, present and future. Members have also viewed a series of videos about our programs more than 2000

times! Throughout October, TRTA released one video per week through Tim Lee's *Inside Line* e-newsletter, featuring interviews with classroom grant recipients, TRTF trustees and Tim Lee himself! TRTF also attended the ground-breaking ceremony for the new West ISD campus and captured a heartwarming conversation with West ISD Superintendent Jan Hungate. To view and share these videos, please visit [www.youtube.com/theTRTATV](http://www.youtube.com/theTRTATV).

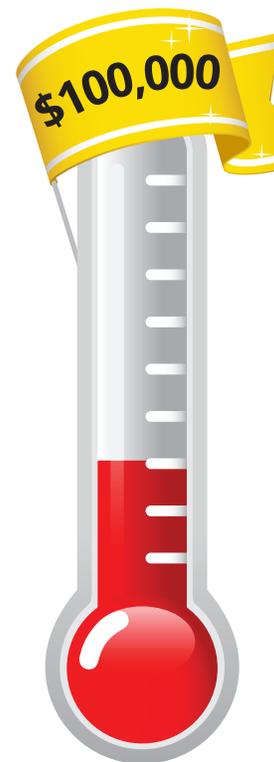
### ***Where does your money go?***

TRTF reaches across generations to assist educators in every phase of their career journey, from studying to become a teacher to leading classroom lessons every day to retiring from TRS and living on a fixed income.

"A Helping Hand" supports our own members who are experiencing financial hardships due to an emergency. Since the program's inception in 2010, \$66,000 has been awarded to 68 individuals. Since July 1, the program has awarded over \$7,300. One member recently needed help paying for her medical

alert service. This service provides her with the security that help is on the way when she needs it most.

In 2014, 15 \$500 student scholarships were awarded as well as 15 \$500 classroom assistance grants. In 2015, TRTF will continue to fund these innovative projects and assist our future educators by awarding 15 \$500 classroom assistance grants and 16 \$500 student scholarships.



CONTINUED ON THE BACK



# The VOICE

Send address changes to:  
Texas Retired Teachers Association  
313 E. 12th Street, Suite 200 | Austin, TX 78701-1957  
800.880.1650 | www.trta.org

## CONTINUED FROM PAGE 11

TRTF also produces educational resources through The Legacy Campaign. This campaign promotes the message that public education, our educators and TRS are vital to the state. As part of this campaign, TRTF recently supported the Teacher of the Year program (hosted by TASA) as a platinum sponsor by providing a \$10,000 donation. Together, educators of the past, present and future weave a legacy that strengthens public education in Texas!

### *Please Help Us Reach Our Goal!*

If you haven't done so, please join our campaign by supporting our programs to help us reach our goal of \$100,000! There is still time to make a tax-deductible donation! Please contact Dawn or Shala at 800.880.1650 to make a credit card donation by phone or use our donation card on this page. Thank you for making 2014 a successful year. Your generosity is greatly appreciated!

## SCHOLARSHIP AND GRANT APPLICATIONS NOW AVAILABLE!

The TRTF student scholarship and classroom assistance grant applications are now available! TRTF will award 16 \$500 student scholarships to students pursuing degrees in education in 2015. TRTF will also provide 15 \$500 classroom assistance grants to public school teachers in Texas for innovative classroom projects in 2015.

If you have a relative pursuing or planning to pursue a degree in education or a teacher's certificate, he or she may apply for the student scholarship! The student must attend school in Texas and take coursework during the 2015 fall semester.

Texas public school teachers may apply for our classroom assistance grants. The teacher must describe a project or learning platform. They must also include information about the school's socioeconomic status and demographic makeup.

The deadline to submit applications for both programs is Thursday, March 12, 2015. Recipients will be announced at the Foundation Breakfast during the 62nd Annual TRTA Convention in Austin on Tuesday, April 7, 2015. Winners do not need to be present to win.

To download an application, please visit our website [www.trtf.org](http://www.trtf.org) and click on the Scholarships and Grants tab or send an email to [info@trtf.org](mailto:info@trtf.org). Feel free to contact us with any questions you may have by calling 1.800.880.1650.

TEXAS RETIRED TEACHERS FOUNDATION

# OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

TEXAS RETIRED TEACHERS FOUNDATION

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