

**News Updates from the
President, Membership &
Public Relations Chairmen**

5

**TRS Board Retiree
Candidates 6**

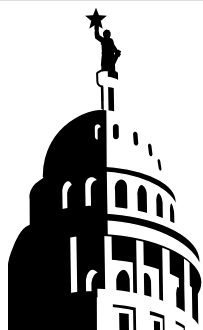
**Reaching New Heights In
San Antonio 8-9**

TEXAS RETIRED TEACHERS FOUNDATION

OUTLOOK

"A Helping Hand" and TRTF annual
Convention plans

11-12



The VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

A CHALLENGING SESSION, A FOCUSED MEMBERSHIP

By Tim Lee, Executive Director

The Texas legislative session is running full steam ahead. The big news is that the state is short billions of dollars needed to maintain its budgetary commitments in the coming biennium. Budget writers suggest the state needs \$27 billion just to sustain various state programs.

The magnitude of the budget crisis is as bad if not worse than what many projected before session. This has forced legislators, state agencies, constituent groups, and others to discuss how to cut the budget. The education portion of the budget alone has been cut by \$9 billion. Many school districts are cutting their own budgets by eliminating staff and extracurricular activities, and doing anything to fill the budget gap.

There is still a lack of understanding by the general public of how bad things may get. The electorate wants to reduce government costs and bloating, but they also want great schools, excellent roads, and guaranteed public safety. While there are always additional cost savings that may be realized by working more efficiently, the reality of the deep budget cuts being proposed are starting to be seen and felt.

How the Budget Cuts Impact Retirees: Pension Trust Fund

Summary of Proposed Cuts: Texas House and Senate budget writers have proposed a reduction in TRS pension trust fund contribution for the FY 2012-2013 biennium.

Current Biennium – TRS State Contribution is 6.644%

Proposed Rate Next Biennium – State Contribution 6.0%

Proposed Reduction in TRS funding – \$505 Million (biennium)



CONTINUED ON NEXT PAGE

A CHALLENGING SESSION, A FOCUSED MEMBERSHIP

The Teacher Retirement System of Texas (TRS) did not escape the budget-cutting axe. The Texas Constitution requires TRS to receive a contribution from the state of no less than six and no more than 10% of the aggregate active teacher payroll. The system is also protected statutorily and cannot have its state contribution reduced if it worsens the actuarial condition of the fund (Texas Govt. Code Sec. 821.006, subsection (a)). Last legislative session, the state passed a contribution level of 6.4%. The fund received an additional \$125 million when the Attorney General denied retirees a \$500 supplemental payment. This effectively increased the state contribution to 6.644%.

The initial budget proposal from the House and the Senate reduces funding for the TRS pension fund back to the lowest level allowed by the Texas Constitution. While it is good that the Texas Constitution protects the fund from being zeroed out, 6% is far less than what is needed to make the pension system actuarially sound. Budget writers are worsening the condition of the fund by lowering the contribution when it is not actuarially sound. Legislators contend that although statute prohibits a change in contribution if it worsens the fund's condition, the Texas budget takes precedence over all other statute (it has Texas Constitutional authority to do so).

The statute that does not allow the state to worsen the condition of the fund should not be confused with the section that prohibits

TRS retirees from receiving a benefit increase if the system is not actuarially sound (Texas Govt. Code Sec. 821.006 subsection (b)). This is the statute that has prohibited the legislature from providing a cost-of-living raise to retirees for the past 10 years.

This "technicality" is one that TRTA points out to legislators as they craft a budget for the next biennium. Retirees have been told for a decade that the actuarial condition of the fund has to be healthy enough to increase benefits. However, the legislature's preservation of the fund through state contribution should be adhered to with as much fervor.

TRTA is calling on the legislature to restore TRS funding to a level that is no less than 6.4%. At this level, the legislature would comply with statute passed in 2007 requiring that their contribution not be less than the active member contribution. The legislature should raise its contribution to ensure the system's actuarial soundness AND provide retirees with a much needed pension increase.

How the Budget Cuts Impact Retirees: TRS-Care

Summary of Proposed Cuts: Texas House and Senate budget writers have proposed a 50% reduction in TRS-Care funding. This cut is likely to drive up premiums, causing retirees to make up the difference. One expert said premiums may increase as much as 30 to 80%!

TRTA Bill Tracker (Additional information may be found at www.trta.org.)

SUPPORT		
HB 60 HB 832	A. Martinez J. Lozano	Would provide a cost-of-living increase in accordance with inflation, equal to the CPI-W.
HB 738 SB 1666	J. Otto R. Duncan	Would increase amount TRS could invest in hedge funds from five percent to ten percent.
HB 917	A. Allen	Would provide for a cost-of-living adjustment of 10 percent, and a four percent annual cost-of-living adjustment.
HB 955	J. Lozano	Would increase the number of members on the TRS board trustees, adding one additional public education and one higher education member.
HB 996	R. Gutierrez	Increases the size of the TRS Board of Trustees to 11 members (9 appointed by the Governor); includes adding another retiree to the board.
HB 1061	J. Otto	Eliminates the expiration date of certain investment authority of TRS.
SB 1665	R. Duncan	Changes the expiration date to September 1, 2019 (from 2012) of certain investment authority of TRS.
HB 1699 HB 2150	J. Menendez C. Eiland	Provides for a one-time supplemental payment for retirees of TRS only if the system remains 80 percent funded after payment is made.
HB 2120	D. Miller	Changes the composition of the TRS Board of Trustees to include an additional TRS retiree.
HB 2341	A. Ritter	Provides the TRS Board of Trustees with the option and authority to pay a one-time supplemental payment to retirees until August 2013.
HB 3542 SB 1333	L. Gonzales B. Deuell	Provides a one-time supplemental payment for retirees, assuming the earnings the retirement system makes on its investments exceeds eight percent during the preceding fiscal year.
HB 3747	R. McClendon	Changes the number of trustees the governor may appoint to the TRS Board of Trustees from seven to three, providing for direct election of the remaining board members.
AGAINST		
HB 2506	W. Chisum	Creates a defined contribution retirement plan for persons eligible to participate ERS and TRS beginning September 2012.
HB 3639 HB 3645	J. Pitts	Removes requirement that state contribution to TRS cannot be lower than active employee contribution; but changes the state TRS-Care insurance contribution to .5%.

Current Biennium – TRS-Care receives a contribution equal to 1% of the aggregate active teacher payroll.

Proposed Rate Next Biennium – 0.5% of the aggregate active teacher payroll.

Proposed Reduction in TRS-Care funding – \$300 Million for the biennium from the state; as much as \$135 million in federal dollars.

TRS-Care is vital to more than 200,000 TRS retirees and dependents. After a major overhaul in 2003, the health plan has been supported by multiple funding sources including retiree premiums, and active member, district, and state contributions. The plan's design was altered in 2003 to include tiered level of coverage with low, mid, and high-level options. The changes also strengthened the restrictions for future TRS participants.

The closure of the Government Pension Offset (GPO) "Loophole" in 2004 forced many retirees to retire earlier than planned. This added a large number of new TRS-Care participants, but the plan endured and no premium adjustments were needed in 2005. Active member contributions and school district contributions increased, but have remained consistent since.

TRS-Care is a very efficient and well-managed health care plan. This has helped the plan develop a fund balance that now exceeds \$700 million. TRTA and the Texas Legislature have partnered for the last three sessions to keep TRS-Care premiums from increasing. This has been a great relief to many retirees who have not had a true cost-of-living raise in 10 years.

According to the Texas Insurance Code Chapter 1575.202, the state is required to make a contribution to the plan equal to 1 percent of the aggregate active teacher payroll. The legislature has fully funded this required contribution for the past 3 sessions. Now the state is proposing reducing funding to 0.5%.

Cutting the state's funding in half this session will cause TRS plan administrators to exhaust the \$700 million reserve fund to cover the costs of the program. In a plan that covers more than 200,000, this \$700 million will drain quickly and TRS will be forced to increase retiree premiums.

In public testimony (before the House PIFS Committee on February 22 and the House Appropriations Committee on March 9), TRS Executive Director Ronnie Jung said the cost share for retirees could be much higher, especially if the state reduces its contribution rate. The increase would be based on several factors:

- State budget cuts for public education will force as many as 35,000 retirements this year;
- During a "normal" year, TRS averages about 12,000–15,000 retirements;
- State contribution decreases from 1% to 0.5% of the aggregate active teacher payroll;
- This would account for a loss of approximately \$150 million each year of the biennium (or \$300 million in total);
- TRS-Care may be eligible to receive as much as \$135 million

per year from the federal government early retirement reinsurance program if the legislation is not declared unconstitutional and implementation continues;

- However, the federal dollars may be lost if the state cannot certify maintenance of effort for funding TRS-Care at levels similar to previous biennia;
- This results in a potential maximum loss of \$285 million per year that may need to be restored through other funding sources to maintain the current level of benefits;
- The result could be an increase in retiree premiums as high as 80% in the coming biennium.

While it was stressed that these are "worst case scenarios" and premiums "may" increase, the obvious conclusion is that reduced contributions for TRS-Care translates into significant premium increases for plan participants sooner rather than later.

The reality is that costs of providing medical care trend up faster than the annual payroll growth for active school employees (remember, the legislature bases their contribution on the aggregate active teacher payroll). TRS has managed this plan effectively and negotiated favorable terms for retirees. Cutting the state contribution level in half during a time of shrinking active employee wages, increased retirements, and quickly advancing health care costs is NOT the plan the Texas Legislature should be implementing.

What Can TRTA Members Do to Help?

TRTA members should hold firm to the idea that your state legislative team lives by: "Never Give Up!" We know this session will challenge us, but not all hope is lost. TRTA members are GREAT representatives for all public education retirees.

Our most important strategy is engaging in a communications onslaught from now until the end of session. As frustrating as it can be to send emails, make calls, and write letters, being seen and heard is vital to our legislative agenda. Utilize the TRTA resources for these activities including the Inside Line, Facebook, Call Your Legislator Hotline (888.674.3788), and TRTA web site. Ask your legislators what they are prepared to do to protect retiree health care costs, restore funding to TRS and block attempts to undermine the defined benefit plan.

TRTA has created a fact sheet (page 4) for you to present to your legislator(s). Information about the TRS pension trust fund and the many reasons legislators should protect the benefits for current and future retirees are included. Copy or download it from the TRTA web site.

Now is not the time to give up on our legislative leaders, but to educate them on the issues that matter to our members. We have from now until the end of session (May 30) to make our case. TRTA's legislative priority is YOU! We are here to protect your retirement, preserve TRS-Care, and maintain the defined benefit plan. We can do this, but we need your help during this difficult session. ★



TRTA: SETTING THE RECORD STRAIGHT

The Texas Retired Teachers Association (TRTA) wants to set the record straight on some of the misconceptions about the Teacher Retirement System of Texas (TRS) and other public funds around the country. It is easy to pigeonhole public pension plans with a one-size-fits-all portrayal of funding conditions, benefit structures, and presumed flaws. The facts are far different than the rhetoric!

TRS is well funded; currently valued at \$108 billion.

TRS does not guarantee cost-of-living increases.

TRS has a funded ratio that exceeds 83%.

95% of Texas school districts do not participate in Social Security.

Are Public Pension Funds an Economic Drain on the Texas Budget and the Texas Economy?—NO!

- Less than 2% of the entire budget is connected to public pension funds;
- Texas taxpayer contributions to TRS totaled \$2.3 billion;
- TRS paid out \$6.6 billion in pension benefit payments in 2010;
- This generated \$900 million in state and local taxes;
- TRS sustains more than 91,500 permanent Texas jobs;
- Accounting for these important factors, the net cost to taxpayers is \$1.4 billion;
- If TRS members were covered by Social Security and did not pay into TRS, the net cost to taxpayers would be \$1.5 billion;
- **Why would Texas want to cut jobs, lose tax revenue, risk the health of our public funds, disadvantage our education employees and retirees, and send \$100 MILLION TAXPAYER DOLLARS TO WASHINGTON D.C.?**

Texas Public Plans ARE Different

- Members in the plan have NEVER taken a funding “holiday;”
- Benefit structure provides a good retirement, at a low cost;
- In fact, TRS benefits are provided for about the same cost as Social Security;
- Benefit increases may be approved by the Texas Legislature;
- The last permanent increase in retirement benefits for TRS retirees was in 2001;
- TRS retirees have access to a state health care plan, BUT, they PAY premiums to access the plan;
- This health care plan is also supported financially by active education employee contributions, school district contributions, federal Medicare reimbursements, state funding, and more;
- No one in TRS gets a “free-ride” for their health care;
- TRS does not have pension spiking;
- Texas return-to-work laws are some of the most strict in the nation;
- TRS is professionally managed, averaging a 9.2% return on its investments since 1986.

▪ TRS is the kind of plan many other states WISH they had!

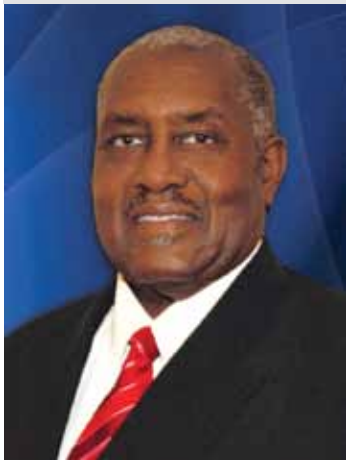
What Should Be Done Now to Protect Our Pension Funds—Protect the Funding, Help the Retirees!

- Do NOT drop state funding to the pension trust fund—doing so will put us on a path similar to other states which are having serious problems funding their pension plans;
- Do NOT cut TRS-Care health insurance funding—reduced funding for the TRS-Care health plan guarantees a premium increase for plan participants;
- End the 10-year drought—find a way to help retirees receive some form of benefit increase;
- Be smart and don't buy into the rhetoric—many groups want to take advantage of other state fiscal woes and promote the demise of the TRS defined benefit plan. Texas will not save any money and will likely be charged more to make a change.
- Listen to TRTA members—With over 73,000 members in the state, we have volunteers in your district. We are happy to arrange a district or Capitol visit so you can hear how TRS is helping your constituents and how they need your help now!



The Voice For All Public Education Retirees

PRESIDENT'S LINE



2010-2011 TRTA PRESIDENT
Herbert Norris



Comments/questions? Contact Herbert Norris
903.566.2309 | herbertnorris@sbcglobal.net

We as TRTA members face a multitude of problems in 2011. Our organization must be more involved, cohesive and vigilant than ever. Not only are we facing financial concerns (annuity, health care and stress about the unknown) but we are fearful about the effects that the current Texas Legislative session will have on our economic well-being. Nevertheless, **WE MUST PRESS ON!**

District 20 President Kenneth Hanson as well as the District 20 members, TRTA Officers and the TRTA staff are working vigorously in the final planning stages for the TRTA 58th Annual Convention. We are anticipating having a very festive, enjoyable, memorable and informative convention. Attendees will be inundated with Fiesta activities, an abundance of superb eating establishments, and many places to shop along the River Walk.

We would like to express our appreciation and gratitude to our TRTA Legislative Coordinator Bill Barnes, Executive Director Tim Lee, and the TRTA Legislative Committee for the dedication and commitment exhibited thus far in these trying times.

We need to remember that solutions do not always come hastily, but as the Good Book states: "The race is not given to the swift but to those that endureth to the end." **It is imperative that we continue fighting for all public education retirees!**

MEMBERSHIP UPDATE

2010-2011
TRTA FIRST VICE-PRESIDENT/MEMBERSHIP CHAIRMAN
Maridell Fryar



Wow! The beginning of another Membership Drive is here! It is difficult to believe, but we in TRTA have to work membership all year round. I trust that each of your local units have been working on different methods of recruiting, retaining and regaining membership for the upcoming year. Remember, the most powerful tool is person-to-person contact.

I know that your plans for attending Convention are being made right now. I hope that every district and local will include the First Vice-President among your delegates so that the inspiration and information available at convention will make its way back to every local unit. And there is nothing wrong with planning for a little bit of fun at Fiesta, too!

Thank you all for your dedication to TRTA and to the issues which are important to public school retirees. We have our work cut out for us (as the saying goes) at this legislative session and only through the concerted efforts of all our members can we hope to meet with success. Please make your plans not only to grow our membership but also to attend the TRTA Day at the Capitol on March 23 - See you there!

PUBLIC RELATIONS UPDATE

2010-2011
TRTA SECOND VICE-PRESIDENT/PR CHAIRMAN
Mary Jane Hamilton



Public relations is letting the public know who we are! Take every opportunity to publicize your local unit's activities and projects. Your unit represents our association. Remember: "TRTA: The Voice for ALL Public Education Retirees."

We are proud to announce that our local units issued 120,343 books through the Children's Book Project. As you plan your book distribution this spring, plan how you will publicize the activity.

Your state PR Committee is excited to announce there will be a special giveaway for each attendee visiting at least five exhibitors at the convention. You can redeem your gift by presenting your signed exhibitor sheet, found in your goodie bag, at on-site registration. TRTA lapel pins will be for sale, and they are great for PR!

I am looking forward to seeing you at Convention in San Antonio. Plan to attend the session for Second Vice-President/PR. We have an updated training guide to discuss and distribute. Bring your ideas to share. See you at Fiesta!

TRTA Interviews TRS Board Retiree Candidates

According to Texas statute, retirees have one dedicated annuitant representative on the TRS Board of Trustees. Linus Wright, TRS Trustee and long-time TRTA member, is not running for re-election to the TRS Board after two successful terms. We commend Mr. Wright for his service in helping oversee the 6th largest pension fund in the country. Now is the time for TRS annuitants to participate in the election process for a new representative on the board. Three TRTA members are running for this position. Below, we provide some background information on each candidate (extended answers to a comprehensive TRTA questionnaire may be found at www.trta.org). We thank each of these members for their willingness to serve and wish them well in their bid for this important position.



George Lynn Britton Jr.

I appreciate the opportunity to introduce myself to my fellow retirees. I am the son of a USAF service family. I have lived in the Lackland AFB area on the west side of San Antonio since 1955. I have a Bachelor of Arts in Mathematics from Texas State University, and a Masters of Education from Our Lady of the Lake University. I taught math at John Jay High School for 36 years. I have a son who works at a local credit union and a daughter who teaches 3rd grade in the Cy-Fair ISD in Houston. I retired in December 2002 and was elected to the Northside ISD school board in the spring of 2003 (I still serve on this board). I have served as Vice-President and Finance Chairman for NISD and current Finance/Budget Chairman for the Alamo Service Connection. I am Chairman of the Bexar County/City

of San Antonio Joint Commission for Elderly Affairs, and a member of the city Board of Adjustment, Salvation Army Advisory Board, and Lackland AFB Community Council on Restoration Board. I am the Past President of the San Antonio Educational Facilities Corporation Board, past Texas and National Governor of Mu Alpha Theta, and past member of the Texas Commission on Residential Construction-Warranties and Performance Standards Board. It is my hope to represent the community of Texas retired teachers, and be a vocal advocate on the issues and policies that affect us and our well-being. I would appreciate your vote.



William (Bill) W. Ishee, Jr

I began my career in public education on January 20, 1969 as a government and economics teacher at Spring Woods High School, and for the next six years served as a counselor and then assistant principal at Spring Woods Jr. High. In November 1975, I joined Klein ISD as a program director for special needs children and began the Human Resource Services Department in 1976. I retired in June 2010 with 35 years of service in Klein and a total of 42 years in TRS. I am pleased to hold a BA-University of Houston, M.ED-Sam Houston State, Ed.D-Texas A&M, and an MBA-Our Lady of the Lake. During my tenure as department head and then later associate superintendent of human resources, I worked with every category of school personnel from professional to classified to support to part-time and to substitute staff.

One of the greatest rewards for educators and staff who have served children is the defined benefit aspect of TRS. As the retiree representative on the TRS Board, I would work to ensure that the defined benefit plan be maintained and that every venue be explored to ensure that those who have served our state's children are not forgotten. We must continue to share with our legislators the value of increased state contributions to the TRS system. My training as a mediator, my active involvement in retirement planning and extensive knowledge of TRS and the state statutes has prepared me to serve you well as your representative on the TRS Board. I am married to the love of my life, Marie, a retired science teacher of 41 years. I am also proud to belong to TRTA as well as the local Klein chapter.



Anita Smith Palmer

Eight teaching certifications, 30 years teaching experience, bachelor and master's degrees from Southwestern Oklahoma State University and post graduate studies at Texas Tech University, Midwestern State University, and Cuernavaca Mexico Center for Bilingual Studies have prepared Palmer for life's challenges. She has made presentations at Johns Hopkins University and Federal First Grants, taught Pre-K to graduate level, served on the Texas Reading Proclamation Committee, State Textbook Committees for Reading and Bilingual Language Arts and the Olney Hamilton Hospital Foundation (OHHF). Anita's fiduciary leadership qualities, which have guided the OHHF to a multi-million dollar endowment fund, will be valuable assets on the TRS board. Even though Mrs. Palmer

has recently moved from Olney, but still has property in the taxing district, she continues to be the President of OHHF. Anita feels that the key to the foundation's success has been a very small administrative budget, focus on the advancement of the hospital, and educated investment strategies. It has been said that "Anita Palmer is the only one who can say, 'Keep your hands off the money!' and they know she means it." Two months after retiring, Palmer joined TRTA and became involved in the local unit as second vice-president, vice-president, and president. She is the immediate past president of TRTA District 9 and serves on the TRTA State Retirement Education committee. As a TRS trustee, Anita will consider it her charge to make board decisions that reflect the concerns of TRS members, active and retired, to be accountable to the governor and legislators, and always to promote the betterment of TRS. In the future, she sees this fund being actuarially sound with the focus being returned to the benefits for the active and retired members of TRS instead of increased administrative costs.

Nominating Committee Report

The TRTA Nominating Committee, chaired by Immediate Past President Dora H. Scott-Nichols (District 4), reports that the following members have filed and are eligible candidates for TRTA office for the 2011–2012 association year. The nominees will be elected by the TRTA House of Delegates during the upcoming Convention in San Antonio. Other members of the committee include Mary Esther Bernal (20), Stephen Caruso (12), Tonna Duke (10) and Charlene McCreight (11).

Herbert Norris, For President

Currently serving as the 2010–2011 State President. Served as the State First Vice-President (2008–2010), Second Vice-President (2006–2008), State Secretary/Treasurer (2004–2006) and District 7 Second Vice-President (2005–2006).

Maridell Fryar, For First Vice-President

Currently serving as the 2010–2011 State First Vice-President. Served as the State Secretary/Treasurer (2006–2008), Midland ARSP President (2006–2008), District 18 Legislative and Retirement Education Committee member and Midland ARSP Newsletter Chairman and Midland ARSP Secretary.

Mary Jane Hamilton, For Second Vice-President

Currently serving as the 2010–2011 State Second Vice-President. Served as the State Secretary/Treasurer (2008–2010), Convention Site Selection Chairman (2009–2010), District 10 President and District Presidents Council Recorder (2006–2008), State CVS Committee member (2007–2008), Allen REA President (2003–2005).

Francis Plemmons, For Secretary/Treasurer

Currently serving as the 2010–2011 State Secretary/Treasurer. Served as State Auditor Selection Criteria Chairman, Emergency Response Committee member, Rusk County RTA Treasurer and Parliamentarian (2009–2010), State CVS Committee Chairman (2007–2009), District 7 President (2006–2008).

Call today for a no obligation analysis.

**Reverse Mortgage Solutions
800.809.0528**



The Texas Retired Teachers Association (TRTA) Board of Directors has voted to sponsor a new Reverse Mortgage program for our members through Reverse Mortgage Solutions (RMS). RMS is one of the top lenders and servicers of reverse mortgages in the country and has the highest possible rating with the Better Business Bureau.

Reverse mortgages are available to homeowners who are 62 or older who live in and own their own home. The older you are, the more funds you can receive. These loans are ideal for retirees that want to stay in their home long-term. Over 750,000 seniors have already taken advantage of this program.

A reverse mortgage is a government insured loan program that allows you to access the equity in your home without making a monthly mortgage payment¹. Unlike traditional "forward" mortgages, the interest on the loan accrues and is paid back when you are deceased or sell your house. If you currently have a mortgage and you have enough equity in your home, it could be paid off from the funds you receive from a reverse mortgage, eliminating your monthly mortgage payment obligation².

We invite you to learn more about reverse mortgages by calling 800.809.0528 to speak with a professional, courteous, reverse mortgage specialist today for a NO OBLIGATION analysis of your reverse mortgage needs.

¹You will still be responsible for making all property tax and insurance payments associated with your home.

²Consult your tax advisor to determine if a reverse mortgage will affect your tax status. Generally, the proceeds are tax free and do not affect Medicare or Social Security benefits.

Herbert Norris



Maridell Fryar



Mary Jane Hamilton



Francis Plemmons



2011–2012
State Officer Nominees



Hundreds of TRTA members are making plans to attend the TRTA Annual Convention in San Antonio, scheduled for April 12-14. This year's theme is "Reaching New Heights!" This sentiment truly represents the work being done by TRTA members this year. The TRTA Board of Directors and the many wonderful volunteers in District 20 will make this a convention to remember!

The convention is being held during one of the most well-known celebrations in Texas: Fiesta! TRTA members and guests will enjoy all the fun atmosphere, food, music, entertainment, art, and culture that San Antonio and Fiesta offer. District 20 volunteers are working with Fiesta planners for a few surprises and special guests.

This year, we will be mixing fun and relaxation with the convention agenda to energize our members and create excitement about the great work TRTA is doing. TRTA is proud to announce that our keynote speaker on April 13 is "San Antonio's most famous resident" Heloise.

Heloise is best known for her syndicated newspaper column "Hints From Heloise," which runs seven days a week in more than 500 newspapers in the U.S. and abroad. She is also a contributing editor and monthly columnist for *Good Housekeeping*. Her awards include the Distinguished Alumnus Award from Southwest Texas State University (now Texas State), where she earned her B.S. in Education and teacher's certificate. Her presentation is sure to be entertaining and thought-provoking.

TRTA is also conducting its first ever Legislative luncheon. This event is almost

sold out, but there is still time to make a reservation. The luncheon will be moderated by Evan Smith, CEO and Editor-in-Chief of the *Texas Tribune*. Evan is an accomplished journalist and expert political analyst. His quick wit and astute sense of current affairs will make the luncheon a must for attendees. Please note that due to capacity needs, the Legislative luncheon has been rescheduled for Wednesday, April 13 (originally scheduled for April 14).

TRTA is proud to announce that LaDonna Gatlin will be the banquet entertainer on the evening of April 13. LaDonna literally grew up on stage singing with her brothers—the legendary Gatlin Brothers. Later, she joined the singing trio, forming the Gatlin Quartet, travelling the country performing gospel tunes. She chose not to pursue a country music career in 1976, when she married and started a family of her own. Her philosophy is that "we each have that 'song' within us," and her goal is to help people find their voice.

Once again, we are proud to host a luncheon with the Texas Retired Teachers Foundation (TRTF). Over the past 2 years, TRTF has raised thousands of dollars to provide financial assistance to retirees, as well as active and future educators. TRTF welcomes Megan Hookey, Director of the National Retired Teachers Association (NRTA), as their guest speaker. Megan is a true advocate for public education retirees around the country. You may read more about her on back page of the bulletin. The Foundation luncheon has been rescheduled for Thursday, April 14 and has sold out.

As a final note, we know that many participants are staying at our convention

overflow property, the Hyatt Regency. TRTA has secured busing that will facilitate your transportation needs from the Hyatt Regency to the Grand Hyatt for all convention activities. The bus schedule is provided below. If you have not already mailed your registration, please do so as soon as possible. Registrations are due by March 28. We look forward to seeing you in San Antonio! ★

CONVENTION SCHEDULE

Tuesday, April 12, 2011

9 a.m. – Noon	TRTA Board of Directors Meeting
10 a.m. – 6 p.m.	Delegate Certification/Registration
Noon – 6 p.m.	Exhibits
1 – 2 p.m.	Leadership Training Meeting
2 – 3:30 p.m.	District Presidents Meeting
3:30 – 5 p.m.	TRTF Board of Trustees Meeting
6 – 8 p.m.	Officers' Welcoming Reception

Wednesday, April 13, 2011

6:30 – 8 a.m.	Ticketed Breakfast
8 a.m. – 5 p.m.	Delegate Certification/Registration
8 a.m. – 5 p.m.	Exhibits
8:30 – 10:30 a.m.	Opening Ceremonies
10:45 – 11:45 a.m.	District Caucus Meetings
12 – 1:30 p.m.	Legislative Luncheon
1:45 – 5:15 p.m.	Breakout Sessions I, II and III
6:30 – 8:30 p.m.	Banquet

Thursday, April 14, 2011

6:30 – 8 a.m.	Ticketed Breakfast
8 – 9 a.m.	Delegate Certification/Registration
8 a.m. – Noon	Exhibits
9 – 11:45 a.m.	First House of Delegates
12 – 1:30 p.m.	TRTF Luncheon
1:45 p.m. – TBD	Second House of Delegates
TBD	Officers' Visitation/Farewell

BUS SCHEDULE

Buses will run continuously from the Hyatt Regency to the Grand Hyatt and return.

On Tuesday, April 12, buses will start at 11 a.m. and run until 8:30 p.m. On Wednesday, April 13, buses will start at 7 a.m. and run until 9:15 p.m. On Thursday, April 14, buses will start at 7:30 a.m. and run until 3 p.m.

CONVENTION PRE-REGISTRATION FORM

PRE-REGISTRATION DEADLINE: MARCH 28, 2011

- ☉ Mail completed form with payment to: TRTA
Attn: Accounting
313 E. 12th Street, Suite 200 • Austin, TX 78701
- ☉ Banquet, Breakfast, and Lunch tickets only sold in advance.
- ☉ Requests for refunds **MUST** be received in the TRTA office by March 28, 2011. No on-site refunds will be issued.

Personal Information (One registrant per form)

LAST NAME	FIRST NAME	MEMBER ID
ADDRESS		
CITY	STATE	ZIP
PHONE	EMAIL	

Officers' Welcome Reception (TUESDAY • 04.12.2011 • 6 – 8 p.m.) **RSVP—CHECK BOX IF ATTENDING THE COMPLIMENTARY RECEPTION** ☐

Pre-Registration Fee

\$20.00	PRE-REGISTRATION (ON-SITE REGISTRATION \$25.00 PER PERSON)	\$ _____
---------	--	----------

Banquet Fee

\$40.00	BANQUET (WEDNESDAY • 04.13.2011 • 6:30 – 8:30 p.m.)	\$ _____
---------	---	----------

Breakfast Fees

\$16.00	GRAND HYATT BREAKFAST (WEDNESDAY • 04.13.2011 • 6:30 – 8 a.m.)	\$ _____
\$16.00	GRAND HYATT BREAKFAST (THURSDAY • 04.14.2011 • 6:30 – 8 a.m.)	\$ _____

Lunch Fees—Due to capacity limitations, the dates of the Foundation and Legislative luncheons have changed.

\$30.00	LEGISLATIVE LUNCHEON (WEDNESDAY • 04.13.2011 • 12 – 1:30 p.m.)	\$ _____
\$30.00	FOUNDATION LUNCHEON (THURSDAY • 04.14.2011 • 12 – 1:30 p.m.)	\$ SOLD OUT

**REQUESTS FOR REFUNDS MUST BE RECEIVED IN THE TRTA OFFICE BY MARCH 28, 2011.
NO ON-SITE REFUNDS WILL BE ISSUED. ALL PRICES INCLUDE SERVICE CHARGES.**

TOTAL REMITTANCE

\$ _____

Payment Information

☐ Check or money order enclosed payable to TRTA

☐ Please charge my credit card

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

▼ EXPIRATION

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



▼ SIGNATURE

OUTLOOK



LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

"A HELPING HAND"

How the program is growing!

11

LEGISLATOR MAKES GENEROUS GIFT

Monthly stipend donated

11

TRTF'S 2011 CONVENTION PLANS

Luncheon details included!

12

"A HELPING HAND" ASSISTS SIX RETIREES SINCE OCTOBER

As you may have read in previous issues of *The VOICE*, the Texas Retired Teachers Foundation launched its newest charitable program "A Helping Hand" statewide in October 2010. The program provides emergency assistance for retirees in critical need.

Since October, TRTF has assisted six individuals with various needs, including medical and dental bills and utilities. One recipient in the Houston area asked for space heaters to warm her home during the often unpredictable Texas winter months. TRTF has awarded over \$4300 in grants from "A Helping Hand" since October 2010, and over \$6300 since the program began in 2009!

The members of the Board of Trustees for TRTF would like to do much more. "A Helping Hand" is a program founded by retirees for retirees, and it is because of your generosity that we are able to help individuals experiencing unexpected crises. You can support this program by making a tax-deductible donation to TRTF and designating your gift for "A Helping Hand." You may also know of someone who needs assistance. You can help by providing contact information for TRTF to an individual who needs help.

If you are a retiree in need of assistance, please contact your Local Unit President or Foundation Representative for application materials. At large members of TRTA may apply by contacting the Foundation office directly at 800.880.1650. The Foundation considers various needs for assistance, including but not limited to medical, dental, and hospital bills, utility bills, home repair, and food. All applications are kept confidential.

Thank you for helping us help others!

Foundation Training Session

Wednesday, April 13, 2011 at 4:15 p.m.

The Foundation will be hosting a training session during this year's Convention. It is recommended that local unit and district Foundation Representatives and Liaisons attending the convention make an effort to participate in the session. The "A Helping Hand" program will be covered, as well as information about the role of representatives and liaisons. We will also discuss tips on how to make your role easier and what resources are available to assist you.

Legislator Donates to TRTF

In February, Texas state representative Byron Cook generously donated his monthly legislator stipend to the Texas Retired Teachers Foundation! Representative Cook serves District 8, which includes Navarro, Limestone, Freestone and Anderson counties. Over 2200 of Mr. Cook's constituents are retired public education employees. Please join us as we extend our gratitude to Representative Cook for his sincerity and compassion in donating to the Texas Retired Teachers Foundation.



Contact Representative Cook:
byron.cook@house.state.tx.us | 512.463.0730
Room E2.214, P.O. Box 2910, Austin, TX 78768



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

2011 TRTA CONVENTION PLANS

FOUNDATION LUNCHEON

THURSDAY, APRIL 14, 2011 12:00 P.M.

As you make your plans to attend the 58th Annual TRTA Convention in April, please consider attending our old and new Foundation events! For those of you attending our luncheon, please be aware that the date has changed to April 14, 2011 (from April 13). The menu includes mixed greens with cucumber, tomatoes, and carrots, rosemary grilled chicken breast with mushroom ragout, fingerling potatoes, grilled vegetables, and chocolate layer cake with fruit coulis. We will announce this year's scholarship and grant recipients, and discuss the progress of "A Helping Hand."

We're sure you will enjoy hearing from this year's guest speaker, Ms. Megan Hookey, Vice-President of NRTA (AARP's Educator Community). She manages NRTA's national headquarters in Washington, D.C. and works closely with NRTA's network of affiliated state retired educators associations. Read more below.

It is common for individuals, districts, and local units to present gifts to the Foundation at the end of the luncheon, resulting in a rousing display of generosity. This year, TRTF will ensure your donation is publicly recognized. If you will be attending the luncheon and making a donation, you may complete a form to include a personal message. Many attendees take this opportunity to honor a current member of TRTA or to memorialize a retiree or family member who was dear to them. Forms will be available at your luncheon table, or in advance through our e-newsletter *The Ledger*. Bring your form and your donation forward to the podium on April 14, and your message will be announced.



Megan Hookey leads the management and operations of the NRTA national office and worked with the Dana Alliance for Brain Initiatives to develop the multi-media Staying Sharp program on brain health. She is closely involved in refining NRTA's member benefits and building a comprehensive strategy to raise awareness for NRTA among educators and others interested in learning.

If you prefer to make your donation online using a credit card, please visit www.justgive.org and search for the Texas Retired Teachers Foundation.

TEXAS RETIRED TEACHERS FOUNDATION

OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

TEXAS RETIRED TEACHERS FOUNDATION

I WANT TO
HELP!

**DONATION
CARD**
DONATIONS ARE
TAX DEDUCTIBLE

Please accept my gift in memory or
in honor of (circle one):

Please accept my donation of:

☐ \$25 ☐ \$50 ☐ \$100 ☐ \$ _____

NAME _____

ADDRESS _____

CITY _____

STATE _____

ZIP _____

PHONE _____

EMAIL _____

Donations are tax deductible. Enclose a check, completed donation card and send to:
Texas Retired Teachers Foundation • 313 E. 12th St., Ste. 200 • Austin, TX 78701-1957