



TRTA:
TEAMWORK IS KEY

Retirement Education

Team Playbook



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Our Purpose



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... shall **collaborate** with Districts and Local Units in developing and sponsoring retirement events for **active educators**, regardless of status of service, and shall promote collaboration with local school districts.



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ALL Active Educators:

- ➔ **New Actives**
- ➔ **Actives with 10+ years**
- ➔ **Actives beginning to plan**
- ➔ **Retiring Actives**
- ➔ **Retirees who are Active**



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ALL Active Educators:

97,729 New Actives

729,069

Actives with 10+ years

Actives beginning to plan

21,624 Retiring Actives

393,914 Retirees who are Active



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....shall collaborate with Districts and Local Units in developing and sponsoring retirement events for active educators, regardless of status of service, and shall promote collaboration with local school districts. The committee shall collaborate with other standing and special committees as appropriate to further the mission of TRTA.



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Collaborate means:
to work with



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**Effective collaboration
will lead to better
recruitment.**



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**If Actives are informed on
a regular basis of the
TRTA mission, it will be
through our collaboration
that they will want to
join us.**



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Why Important to Membership



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**As a TRTA leader,
today's actives represent
your future new members.**



Retirement Education

**As a TRS annuitant,
contributions from Actives
insure the sustainability of
the Teacher Retirement
System so that you
receive a monthly check.**



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As a retiree, Actives are on the front line trying to uphold a successful public education system that is challenged by underfunding and diminishing benefits.



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How
YOU
Can Help



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Know Your Message



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Role of Texas Legislature **VOTE!**

- 181 Legislators control their future
- 165 elected/re-elected every 2 yrs.
- Since 2005, changed TRS benefits and insurance 7 times



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Role of TRS and SS



STAY
INFORMED!

- Defined Benefits
- No Regular Cost of Living Increase
- Changes Possible Every 2 Years
- Tiers Added Age Restrictions
- No Continuing Obligation for Retiree Insurance



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Role of TRS and SS



STAY
INFORMED!

- **WEP:** Affects non-public work
(**Windfall Elimination Provision**)
- **GPO:** Affects benefit from spouse
(**Government Pension Offset**)



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Role of TRTA  **SUPPORT!**

- Largest group of retired educators
- Our only advocate since 1995
- Strong legislative efforts in Austin
- TRTF opportunities for Actives



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Specific to Audience  **ACT NOW!**

- Plan for future retirement
- Prepare for upcoming retirement
- Participate in TRTA once retired



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**Choose a
Strategy for
Success**



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1. Assess Your District's Potential

- Number of local units, number of ISDs, total school employees
- Previous successful efforts/events that could be repeated and replicated in more local units



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2. Encourage Locals to Develop Realistic Plans

**Member
Power**
↓

Budget
↓

**Target
Audience**
↓

Type of Event



Retirement Education

3. Set Attainable Goals

- Contact all superintendents.
- One effort/event by all local units.
- Gather emails at all opportunities.



Retirement Education

3. Set Attainable Goals

- All superintendents: **1,247+**
- All local units: **250+**
- Emails at All opportunities:
retirement.info.Dist7@gmail.com



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3. Set Attainable Goals

RE Report	2016	2017
Supt. Contacts	0	ALL
Local Efforts	2	ALL



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Collaborate



Retirement Education

Work with your TRTA Retirement Education Committee

- My email address:
Retirement.ed.forum@gmail.com
- Committee members will be contacting District RE Chairs



Retirement Education

Work with your District RE Committee Chair

- Encourage collaboration with state committee members
- Promote collaboration among all local RE chairs



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**Your Team Playbook
is Now
Complete.**

Thank You!!