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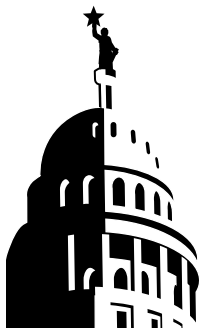


TEXAS RETIRED TEACHERS FOUNDATION

OUTLOOK

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The VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION



Texas Retired Teachers Association

CELEBRATING SIXTY YEARS OF EXCELLENCE



TEXAS RETIRED TEACHERS ASSOCIATION CELEBRATING 60 YEARS

The Texas Retired Teachers Association was founded in 1953. The six founding local units of TRTA were formed in El Paso, Dallas, Ft. Worth, Houston, San Antonio and Austin. Today, 60 years later, TRTA has 258 local units statewide and over 78,000 members!

Featured on the front cover, top left to right: Eula Ware, E.L. Galyean, Dr. Kate Bell and Mike Lehr; bottom left to right: Executive Director Tim Lee and TRTA President Maridell Fryar.



Sixty-five of the 200 members of these six local units met and planned the state organization, which became known as the Texas Retired Teachers Association.

TRTA's first state president was Miss Eula Ware of Houston, Texas.

TRTA held its first Convention in November 1954 in Fort Worth at the Fort Worth Children's Museum. At that time, membership dues were \$1.00!

By 1968, TRTA had 30 local units. That number more than doubled by 1971 to 77 local units! And by 1975, there were 139.

In 1980, E.L. Galyean was appointed to be TRTA's first Executive Director. He worked on a volunteer basis for over 12 years, sharing a two-suite office with a staff secretary in the TSTA building.

Dr. Kate Bell was elected as TRTA president in 1981. Under her leadership, TRTA organized into 20 districts. She also served as chairman of a committee to study ways to raise funds for a TRTA building.

Consequently, the TRTA Building Fund Trust was established in 1988.

1953

1954

1968

1980

1981

1993

In 1993, a four-phase Consumer Price Index Catch-Up Plan was created by the TRTA Legislative Committee under the leadership of Mike Lehr. It was designed to increase annuities for TRS members whose incomes were 15 to 115% below the CPI. A bill to accomplish this goal was passed by the 73rd Texas Legislature and signed by Governor Ann Richards in 1993. The second, third and fourth phases were signed into law by Governor George W. Bush in 1995, 1997 and 1999 respectively.

Mike Lehr was appointed as TRTA Executive Director in 1994, and was instrumental in ensuring that the CPI catch-up plan was instituted.



1999

The first Children's Book Drive was implemented in the fall of 1999. This program has given more than 700,000 books since its inception and continues to place books in the hands of Texas school children.



2004

Today, TRTA resides in its permanent home in Austin, within a few hundred feet of the Texas Capitol.

Executive Director Tim Lee, who has worked with the association since 2004, continues to work closely with members of the Texas Legislature and volunteer retirees to improve benefits for all 300,000-plus public education retirees.

2007

During the 80th Legislative Session, legislation was passed to provide TRS retirees with the first ever supplemental payment, also known as a 13th check. Retirees received the extra payment in January 2008, which was their first form of financial relief since 2001.



2013

TRTA was instrumental in passing landmark legislation (Senate Bill 1458) during the 83rd Legislative Session that made the TRS pension fund actuarially sound for the first time in many years. 200,000 TRS retirees received their first permanent cost-of-living increase since 2001 under this bill. TRTA also celebrated 60 years of serving Texas' public education retirees in 2013.



★ MEMBERSHIP UPDATE

What a wonderful job you have done in membership recruitment! TRTA had an increase of 5,127 members in 2013, for a total membership of 77,187 as of February 28. TRTA local units have taken on the ambitious task of recruiting new retirees and active teachers, as well as at-large and previous members. Districts 4, 9, 11, and 14 all had gains of over 100 new members!

We are pleased to announce the creation of our 258th local unit, McKinney Area School Retirees Association, located in District 10. Jo Long, District 9 President, installed the new officers: Betty Rutledge, President; Judy Montgomery, First Vice-President; John Guidrey, Second Vice-President; Laura Cooper, Recording Secretary; and Martha Swindall, Treasurer.

Our local membership numbers have surpassed the total of those who have chosen not to join a local unit. We realize that at-large retirees are supporting TRTA through their state membership dues. We encourage these retirees to participate in legislative activities, such as maintaining contact with their legislators, attending Day at the Capitol, signing up for the Inside Line, and working with TRTA members as we "Speak with One Voice." It will take ALL retirees to combat those groups trying to eliminate our pension plan!

I am recommending to the TRTA Board of Directors that the Each One Bring One membership initiative continue for another year. Many district presidents feel that members are just now understanding the process and would like to see it continue. I have heard that local unit presidents and first vice-presidents are instrumental in encouraging participation. We will study the program's effectiveness. We encourage district and local units to recognize effective recruitment by its members and reward them locally, in addition to the awards given at the state level.

Thank you for the time and energy you give to TRTA! Let's work towards 84,000 members in 2014!



Francis Plemmons

2012-2013 TRTA First Vice-President



Helping Caregivers Maintain their Health

To support caregivers, the Texas Respite Coordination Center and Texas Department of Aging and Disability Services created the Take Time Texas website, www.taketimetexas.org. Take Time Texas is the first statewide clearinghouse of information for caregivers. It includes an inventory of over 1,000 respite care providers to help caregivers find help.

Approximately 3.1 million caregivers in Texas help older adults and persons with disabilities live at home.¹ However, many caregivers experience health problems as a result of their responsibilities. Sixty percent of caregivers report having fair or poor health and 20-50% report depressive disorders.²

Respite care gives caregivers a break and strengthens their ability to continue providing care. A survey of Texas caregivers found that nearly 80% agreed respite care would reduce their stress. However, half had not used respite care. Another 22% wanted respite care, but could not find it.³ Take Time Texas helps caregivers find respite care and other information to improve their well-being.

¹ Unpublished estimate by Texas Department of Aging and Disability Services, 2013

² National Family Caregiver Alliance. (n.d.) Selected Caregiver Statistics. As referenced in, Texas Department of Aging and Disability Services, Informal Care in Texas.

³ Texas Health and Human Services Commission (2013) Unpublished Results of Caregiver Survey.



Dallas Zoo Discount Tickets Program

You are now able to buy discounted tickets to the Dallas Zoo, with the added convenience of printing your admission tickets from your computer and presenting them at the entrance turnstiles bypassing ticket booth lines. Go directly to our online store 24/7 at <https://zootickets.dallaszoo.com> and enter this personalized Store Name: trta. We hope you are able to visit the Dallas Zoo soon!

Your Ticket Prices:

Adult (12-64) \$8 (46% savings)
Child (3-11) \$8 (33% savings)
Senior (65+) \$8 (33% savings)

VICTORY

What We Won, How We Won It, What's Next!

By Tim Lee
Executive Director

The 83rd Legislative Session came to a close on a high note for retirees this year. TRTA members helped pass legislation that makes the TRS pension fund actuarially sound. For the first time in 12 years, TRS will be authorized to provide a pension increase for nearly 200,000 retirees!

Though a tremendous amount of work took place during the past 5 months, the work done by TRTA members leading up to session paved the way for our hard-earned success.

That hard work and ongoing membership investment has paid off! TRTA has protected the defined benefit (DB) plan and put TRS on a path to providing much needed pension increases for our retirees.



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Setting the Stage: Pension Plans Under Attack, TRTA Responds in Force!

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Health Care Changes: TRS-Care Modifications Implemented in 2012

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What's Next for TRTA Members?

83RD LEGISLATIVE SESSION WRAP-UP

We have been through many tough legislative sessions over the last decade, but our members did not give up! Instead, they became more focused, determined and active! We have achieved big goals, but our mission to help ALL TRS retirees is far from over.

We hope you find this TRTA 83rd Legislative Session Wrap-Up helpful. Your tenacity and dedication are the reasons TRTA is successful! We must continue our outreach efforts and prepare ourselves for the struggles ahead.

Setting the Stage: Pension Plans Under Attack, TRTA Responds in Force! At the end of the 2011 Legislative Session, one in which TRTA struggled to get a state contribution above 6.0%, our members were frustrated and tired from a lengthy fight. At the time, powerful groups such as the Texas Public Policy Foundation (TPPF) and Texans for Public Pension Reform (TPPR) pushed a defined contribution agenda. TRTA successfully defeated a bill that would have changed the TRS pension fund from a defined benefit plan to a 401(k)-style plan.

Despite that significant accomplishment and amid a thinly stretched budget, retirees did not receive any financial help. A bill authored by our friend Representative Larry Gonzales to provide retirees with a supplemental payment, also known as a 13th check, passed the House but failed to pass in the Senate.

The failure of the 82nd Legislature to pass a benefit increase cemented a 10-year absence of any cost-of-living increases for TRS retirees and a 5-year period since the one and only 13th check was paid in 2008.

The Texas Legislature was prompted by the confusing defined contribution discussion to mandate a study of the pension fund. The TRS study, completed in September 2012, covered every possible topic from how to make the pension fund sound to the costs of shifting TRS to a defined

contribution (DC) or hybrid retirement plan.

During the interim, TRTA saw an opportunity to reach out to active educators about their retirement security. Executive Director Tim Lee attended numerous Region Service Center meetings, school functions and association events to speak about the high cost of losing the TRS defined benefit plan.

TRTA also launched its first ever Legislative Training Initiative in July 2012. This statewide initiative began in Austin, where state and district legislative chairmen received training alongside district presidents. The focus of the training was aggressive protection of the TRS defined benefit plan.

Training materials, available to all of our members online, included a comprehensive resource guide and training manual. The Legislative Training Initiative also was produced in video form, allowing members to hear firsthand about techniques to communicate with legislators and candidates. (All resources are available on our website (trta.org) under the Legislation tab, TRTA Legislative Initiative section).

The Legislative Training Initiative spread to local units, many of which organized legislative contact teams who are at-the-ready when quick action is needed by TRTA members. These contact teams, along with some Level Two volunteers with close ties to legislators, continued to promote our messaging throughout the summer and during the 2012 election cycle.

TRTA members, determined to protect what they had worked so hard to achieve, pursued an aggressive communications and partnership campaign with our friends in the active educator community. Though significant special interest organizations continued their barrage of attacks against the TRS DB plan, our members pushed back even harder. Educating elected officials and building strong relationships with our allies had a profound impact.

Health Care Changes: TRS-Care Modifications Implemented in 2012 In the meantime, significant changes were made to the TRS-Care retiree health insurance program, leading to a new Medicare Advantage plan in early 2013 and many questions for our members. The prescription drug provider for TRS-Care participants also changed in 2012.

Even with these changes and all the good work that TRS has done managing TRS-Care, the fund was hit hard by cuts instituted by the Legislature in 2011 and 2012. The projected shortfall for TRS-Care in the next legislative session (beginning in 2015) will be in excess of \$1 billion.

With many changes and lingering frustration from the 2011 session, our members were ready to be vocal with candidates for political office. Nothing was more important to them than simply keeping what they have and electing Senators and Representatives that would find a way to protect their benefits.



TRTA members pose with legislators during Day at the Capitol.

This required a significant amount of educating. As many of our members know, there were over 50 new members in the House and Senate this year. With the myriad of issues legislators face, it was important for our retirees to ensure these new officials understood the great value of TRS and what a vital impact it has on their lives and financial security.

83rd Session Overview: TRTA Focuses on Funding, Protecting Retiree Benefits

When the 2013 Legislative Session began, TRTA was ready to push an aggressive agenda for higher state contributions to TRS, financial relief for retirees, and protection of TRS-Care.

These items were introduced in various bills by our many friends in the Legislature. The groups that wanted to eliminate our TRS DB plan were also ready, but their agenda was vastly different than ours. TRTA's focus was on making the fund actuarially sound, which would allow for better opportunities to protect TRS-Care in 2015.

The need for action on actuarial soundness became even more apparent as we learned more about new pension reporting methodologies. This elephant in the room is known as the Government Accounting Standards Board (GASB) Rule 68.

The new GASB rule, which begins implementation in January 2014, is the result of growing concerns over public pension funding across the United States. Rule 68 changes the way public pension funds' liabilities appear on a state's balance sheet. If a public pension fund is deemed as not having a "funding period" (a time when the plan will be 100% funded), the plan cannot use board determined investment return assumptions. Instead, they are forced to use a much lower "blended rate," which has a large impact on the assumed funded balance.

GASB 68 meant that if TRS was considered 80% funded in 2013 it could be as low as 60% funded under the new rule by 2014.

That looming reality, along with the knowledge that TRS retirees had now not had a cost-of-living increase in 12 years, urged TRTA members to action. TRTA was also surprised to learn that no members of the House Pensions, Investments, and Financial Services Committee from the previous session were reappointed to the new House Pensions Committee.

Facing numerous threats, completely different accounting rules, potentially hostile political interests, the increasing loss of buying power for current TRS retirees, and a brand new House Pensions committee, TRTA faced an uphill climb early in session.

Legislative Champions Rally with TRTA

Despite all of this, TRTA quickly found many friends in the Texas Legislature who wanted to help. Representative James Keffer filed HB 1383, urging the state to increase its contributions to the fund gradually over time, from 6.4% to 7.4%. At the time, this stair-step approach was considered the most reasonable one and perhaps the only option available for protecting the fund. Representative Larry Gonzales, who championed a 13th check bill in 2011, returned with the same bill in 2013 (HB 103). Senator Bob Deuell carried the bill in the Senate (SB 643).

On March 20, TRTA held its Day at the Capitol event, where over 1,000 TRTA members converged wearing red shirts, carrying red bags and filling the halls and galleries. Retirees visited hundreds of offices promoting HB 1383, HB 103 and SB 643. The new Pensions Committee Chairman, Representative Bill Callegari, made a special effort to greet our members on the east lawn, as did Pensions member Representative Roberto Alonzo. Representatives Jim Keffer and Harvey Hildebran also rallied with our retirees.

TRTA members quickly realized after

TRTA members with Lt. Governor Dewhurst and Senator Duncan.



the Day at the Capitol event that our number of friends in the Legislature had grown. Although TRTA did not write the legislation, longtime retiree supporter Senator Robert Duncan along with Representative Bill Callegari came together to formulate a TRS omnibus bill that effectively would end the overwhelming worries about the GASB 68 rule for TRS.

SB 1458, now known as the "TRS Actuarial Soundness Bill," was crafted over several weeks of lengthy discussions among legislators, TRTA, active education employee/employer groups and TRS actuaries.

We worked closely with our friends in the active educator community, but made it clear that our primary function was representing the interests of all current and future TRS retirees. Our top priority was long-term solvency for TRS. Solvency protects our vital TRS defined benefit plan and makes increases possible for retirees.

As discussions progressed, TRTA lent its support to Senator Duncan and Representative Callegari while working with groups such as ATPE, TASB, TASA and TEPSA to improve the bill. By early May, actuaries indicated that it may be possible due to current investment returns and contribution changes to provide some retirees with a 3% cost-of-living increase. Initially, this extended only to retirees who retired in 1994 or before.

Soon, as the bill added a school district

contribution to the TRS fund for the first time in the fund's history, that COLA was extended to retirees who retired in 1999 or before. Still, this included only about 100,000 of 300,000 retirees. The bill became acceptable in mid-May to the majority of active teacher groups as Senators Wendy Davis, Kirk Watson and Royce West worked with Senator Duncan to improve some of the bill's provisions. As a result of their efforts, an additional \$100 million was added to TRS.

With this bipartisan effort, SB 1458 received unanimous support and passed out of the Senate. The bill was then sent to the House Pensions Committee, where Chairman Callegari and committee members accepted the bill in its new format.

Before the bill made it to the House floor for a vote, some concern over the COLA for retirees was raised. From the House floor, Representative Bill Callegari added an amendment which expanded the COLA to those who retired as of August 31, 2004 or before, meaning nearly 200,000 retirees, many of whom are in their seventies and eighties, now would receive a benefit increase!

While TRTA worked aggressively to expand the COLA, our friends in the active community raised some contention over the grandfathering provision for active educators. State Representatives Armando Walle and Phil King passed amendments to the bill to address this issue and also included language for all TRS retirees to receive a 13th check. SB 1458 then passed the House, again with unanimous support!

The Senate did not agree with all of the new amendments, so a conference committee was appointed to negotiate the final details. It was later determined that keeping Representative Walle's amendment would have prevented the fund from becoming actuarially sound. If kept, no retiree would have received a COLA or a 13th check. It was determined that the expanded COLA provision could remain and still maintain the fund's actuarial soundness; however, extending the COLA beyond the 2004 date would make the fund not actuarially sound.

With the expanded 2004 COLA intact and all other provisions in place for increased state, member, and school district funding, the "TRS Actuarial Soundness Bill" was finally passed by the 83rd Texas Legislature!

SB 1458 Specifics The 3% cost-of-living increase applies to retirees who retired as of August 31, 2004 or before, and is capped at \$100 per month. SB 1458 also increases the state contribution to its highest level since 1995, bringing it to 6.8% in both 2014 and 2015. The active teacher contribution will increase over time, remaining at 6.4% in 2014, rising to 6.7% in 2015, then to 7.2% in 2016 and finally capping at 7.7% in 2017.

In addition, the new school district contribution of 1.5% goes into effect in 2015. SB 1458 also creates a link between

the contributions from the state, active members and school districts, meaning that if the state contribution is reduced by a tenth of percent, so too will contribution levels from actives and districts be reduced by a tenth of a percent.

Because of the graduated increases in funding over the next 5 years, the fund will become more financially stable. SB 1458 truly creates a system that is sound and viable for many years to come. This means more benefit increases for more retirees will be possible.

This has not been a real possibility for TRS retirees in a very long time! For years, with a fund that was relatively healthy but not considered sound by state law, our members had to face growing costs on stagnant incomes. For the first time in 12 years, we now have not only hope, but a PLAN, which already has been set into motion.

None of this would have been possible without our members constantly reaching out to their legislators, during session and the interim. This slow build of consistent messaging is the essence of our grassroots movement. Our members sent over 115,000 emails and made thousands of phone calls this session.

TRTA also thanks all legislators who made SB 1458 possible, including those who worked to ensure that money was available in the state budget to pass the bill, such as Senator Tommy Williams and Representatives Jim Pitts and John Otto. We owe tremendous gratitude to Senators Duncan, Davis, Watson and West and Representatives Callegari, Keffer and Alonzo for protecting TRS for generations to come!

What's Next for TRTA Members? This does not mean we can now stop and rest on our laurels! SB 1458 was a hard-fought and hard-won success, but requires maintenance. We must work together to ensure that those very possible increases for more retirees become a reality! We must be vigilant in holding the state to its great TRS plan!

We also face significant challenges in addressing the funding of the TRS-Care health insurance program. This will be a top concern not only for TRTA but for legislators as well next session. Just as we did for the 83rd Legislative Session, we cannot wait until session begins to start talking to our legislators about how to fix this broken but very necessary system.

TRTA works to improve ALL of your retirement benefits, and that work must be done all year long, every year. Together, we have faced and conquered tremendous challenges this session. Together, we are stronger. Together, we must work to protect TRS-Care and help more retirees!

Thank you for your hard work. Let's spread the word that TRTA works for ALL TRS retirees. Let's activate potential members who may be sitting on the sidelines. NOW IS THE TIME TO JOIN WITH TRTA! ★

Highlights from the TRTA 60th Annual Convention

The Texas Retired Teachers Association (TRTA) held its 60th annual convention in Corpus Christi April 9-11, 2013. Nearly 1000 members met at the American Bank Center to receive training, vote on several bylaws amendments, and elect officers for the next year. This year's event, termed the "Diamond Jubilee by the Sea," also celebrated TRTA's 60 years of serving public education retirees.

During Opening Ceremonies, members listened intently to guest speaker Riney Jordan, himself a retired educator. A commemorative 60th TRTA anniversary video aired, which all of our members will enjoy viewing on our website at www.trta.org.



Tim Lee and Glenna Burns

TRTA history was on display in the exhibit hall, where a special booth featured artifacts such as the very first TRTA newsletter and the shovel used to break ground on what is now the TRTA building in Austin.

Convention attendees attended sessions to improve their skills as local unit officers

and learn about emerging technologies, such as TRTAConnect (read more on page 12). Informational sessions, such as "What is that Bird?" and "King Ranch: From Then to Now," also filled members' busy schedules.

Other enjoyable events included the banquet, where Glenna Burns of Lubbock was honored with the E.L. Galyean Service Award (pictured to the left with Executive Director Tim Lee). Glenna, ever boisterous and spirited, encouraged the crowd to chant along with her as she shouted "Now retiree don't you fret, TRTA will find the answer yet!" The crowd also enjoyed La Donna Gatlin's performance, which included a song she wrote especially for the association titled "Diamonds for TRTA" (listen online at www.trta.org).

The Texas Retired Teachers Foundation (TRTF) continues to do great work, and announced this year's 15 scholarship and 15 classroom assistance grant winners. They also raised an astounding \$11,000 during their annual luncheon. Read more about the Foundation in the special TRTF Outlook section on pages 13-16.

This year's convention delegates had several important bylaws amendments to discuss. The most poignant discussions during the House of Delegates centered around the amendment to increase the state dues for joining TRTA from \$25 to \$35, effective for the 2014-2015 membership year. "We cannot continue to kick this can on down the road while TRS is being attacked by outside groups that have billions of dollars," said District 13 member Wayne King. "Here in Texas we have at least 10 highly funded groups that are doing everything in their power to change or eliminate TRS," continued Mr. King. "We cannot afford to let this happen! This dues increase will provide funds to fight this movement. It took 20 years to establish TRS but it would only take one year to eliminate TRS as we know it." *Continued on page 11*

2013 TRTA District Fall Conventions

1	10/21/13	8 a.m.-3 p.m.	S. Texas College, Pecan Campus	Pecan Blvd. • McAllen	Maria V. Garza
2	10/22/13	8:30 a.m.-2 p.m.	Holiday Inn Airport	5549 Leopard St. • Corpus Christi	Leroy DeHaven
3	10/23/13	9:30 a.m.	First United Methodist Church	106 E. Cleveland St. • Beeville	Carolyn Hale
4	10/18/13	9 a.m.-2 p.m.	Memorial Church of Christ	900 Echo Lane • Houston	Marcy Cann
5	10/3/13	10 a.m.-2 p.m.	St. Mark Episcopal Church	680 Calder St. • Beaumont	Linda Briggs
6	10/16/13	8:30 a.m.-3 p.m.	Region 6 ESC	3332 Montgomery Rd. • Huntsville	Don Allphin
7	10/1/13	8:30 a.m.-Noon	Henderson Convention Center	1005 St. Hwy. 64 W. • Henderson	Gloria Bethany
8	10/3/13	8:30 a.m.-Noon	Region 8 ESC	4845 US Hwy. 271 N. • Pittsburg	Mary Nell Short
9	10/8/13	9:30 a.m.-2:30 p.m.	Region 9 ESC	301 Loop 11 • Wichita Falls	Dale Thomas
10	10/7/13	9 a.m.	Highland Springs Retirement Community	8000 Frankford Rd. • Dallas	Jo Long
11	10/15/13	8:30 a.m.-3 p.m.	Walnut Ridge Baptist Church	1201 SH 360 • Mansfield	Jo Ann Smith
12	9/23/13	8:45 a.m.	Region 12 ESC	2101 W. Loop 340 • Waco	Laura Rothrock
13	9/27/13	8:30 a.m.-12:30 p.m.	First Christian Church	3105 Ranch Rd. 12 • San Marcos	Mollye Long
14	9/25/13	9 a.m.-Noon	Region 14 ESC	1850 Hwy. 351 • Abilene	Bob Warner
15	9/26/13	9:30 a.m.-2 p.m.	Brownwood ISD Admin. Bldg.	5707 Southside Dr. • Brownwood	Lynn Granzin
16	10/24/13	8:30 a.m.-3 p.m.	Region 16 ESC	5800 Bell St. • Amarillo	Tommy Hayes
17	10/10/13	9:30 a.m.-2:30 p.m.	Lubbock Women's Club	2020 Broadway • Lubbock	Mary Sexton
18	9/16/13	9 a.m.-2 p.m.	Region 19 ESC	2811 La Force Blvd. • Midland	Ann Parish
19	10/8/13	10:30 a.m.-2 p.m.	Wyndham Airport Hotel	2027 Airway Blvd. • El Paso	Norma K. Irwin
20	10/24/13	9:30 a.m.	Ye Kendall Inn	128 W. Blanco • Boerne	Dr. Charlotte Travis



TRTA 60th Annual Convention

- 1 District 2 Volunteers
- 2 Members attend the Officers Reception
- 3 Members attend the Officers Reception
- 4 Members attend the Officers Reception
- 5 SJB Productions
- 6 Members visit the exhibit area
- 7 Members visit the exhibit area
- 8 Members attend various training sessions
- 9 Men's Chorus
- 10 TRTA Historian Dr. Sandra Neubert
- 11 Members attend the Banquet
- 12 TRTA Members and Second Vice-President Nancy Byler
- 13 Members attend the Banquet
- 14 Dr. Barbara Hryekewicz and Gloria Bethany
- 15 TRTA First Vice-President Fran Plemmons and TRTA President Maridell Fryar



Highlights from the TRTA 60th Annual Convention continued

Mollye Long, District 13 President, also spoke from the floor, stating that “the dues have not increased since 1999” and that “costs for providing member benefits have increased as have the needs for staff.” She noted that the increase in funds “will be directed to the districts and local units to be more proactive in their support of legislative and organizational goals.”

\$3.00 of the \$35.00 state dues amount will rebate to the district of which the member is a resident. The funds generated by the dues increase will grow TRTA’s already robust legislative initiative as we work towards resolving the challenges presented by the TRS–Care health insurance program.

Members also voted to eliminate the State Audit Committee and to have all District Secretaries and Treasurers become automatic delegates to the TRTA House of Delegates. Appointed officers will now serve two-year terms instead of one-year terms, matching the amendment adopted the previous year in which elected officers serve two-year terms.

An amendment to have members join TRTA only through a local unit was not passed. Likewise, an amendment to conduct the TRTA Convention only in even-numbered years was not approved.

Officers chosen for the 2013–2014 year are President Maridell Fryar, First Vice–President Fran Plemmons, Second Vice–President Nancy Byler and Secretary/Treasurer Don Vardeman. The Nominating Committee consists of: Chairman Herbert Norris, Immediate Past President; and members Charles Thompson, District 8; Dr. Martha Jones, District 3; Julia Cummins, District 10; and Jack Teddlie, District 11.

We appreciate all members who were able to attend this year’s very productive convention. Your dedication to improving the strength of the association grows our influence in the Texas Legislature and beyond! ★

PROFESSIONAL LIABILITY INSURANCE

FOR CERTAIN RETIREES RETURNING TO WORK



Professional Liability Insurance is available for Regular 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. (For policy exclusions, contact

John A. Barclay, III, 512.476.6566.) **Renewals and new applications for this insurance will be accepted by TRTA through January 31, 2014.**

You **MUST** receive your paycheck from the ISD, NOT from a third-party employer to be eligible for this insurance and you **MUST** be a TRTA Regular Member. The TRTA–endorsed group professional liability plan through John A. Barclay, Inc. has an annual charge of \$39.00 per person.

Insurance Premium per Member \$35.00 + State Taxes and Fees (4.91%) \$1.72 + Association’s Administrative Fees \$2.28 = TOTAL \$39.00

The policy pays:

- ❖ Coverage A: Up to \$1,000,000 per insured, per occurrence/\$3,000,000 per occurrence
- ❖ Coverage B: Up to \$5,000 per claim, per insured. Subject to the \$10,000 annual aggregate for criminal proceedings and/or sexual misconduct \$1,000,000 annual aggregate, all claims under Coverage B
- ❖ 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, 2013 through July 31, 2014). A policy summary will be mailed 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.



PROFESSIONAL LIABILITY INSURANCE FORM

Name

Address

City + State + Zip

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

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

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 2013–2014, 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 to: TRTA • 313 E. 12th Street, Suite 200 • Austin, TX 78701–1957

EFFECTIVE GROUP POLICY DATE: AUGUST 1, 2013 – JULY 31, 2014

TRTACONnect is Almost Here!

There is growing excitement among local unit officers due to the much anticipated launching of TRTACONnect. TRTACONnect is a new tool for reporting local unit membership and payment of state dues.

This tool is designed to streamline local unit management. Local units electing to use TRTACONnect will have pages of membership reports reduced to a quick, easy session at a computer. In four simple steps, membership reporting is complete! You don't even have to send a check. State dues will be paid through bank draft—which ensures that the correct amount is forwarded to the state, always!

The process works from any computer and does not require any special equipment or software. All that is needed is an internet connection and an email address.

The report feature is perhaps the most useful one TRTACONnect offers. Local units will have access to updated membership reports—very similar to those received twice a year—at their fingertips. This report can be exported into an Adobe or Excel file. This feature also enables mail merge for letters and labels. It can be used to create worksheets for tracking attendance at meetings or to verify contact information. The possibilities are endless!

TRTACONnect is a time-saving tool designed to make our volunteers' jobs easier. It is also completely secure. TRTACONnect utilizes one user per local unit, and sign on is secured by password. The user, or "Local Unit Manager," can be the Treasurer, First Vice-President or another officer.

TRTACONnect is the result of years of development. It has undergone several iterations to ensure maximum ease and usefulness to TRTA volunteers. In March 2013, a group of six local and district officers came to Austin for training. These six individuals provided valuable feedback prior to linking TRTACONnect to the live database. Thanks to them, TRTACONnect will be available by July 2013! The six members of the test group are Mary Helen Cornish, Barbara Eatherly, Marion King, Michael Landrum, Tom Sanders and Wayne Schade. For more information about how your local unit can participate in TRTACONnect, please contact Brenda Hoisager at 1.800.880.1650.



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

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ASSOCIATION MEMBER
BENEFITS ADVISORS



OUTLOOK



LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

TRTF SCHOLARSHIP AND GRANT RECIPIENTS

2013 Students and Teachers Awarded

14–15

WEST RELIEF FUND

TRTA Members Support Each Other

15

DONATE TODAY!

Donation card on the back of *The VOICE*

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“A HELPING HAND” OFFERS SUPPORT TO MANY

“A Helping Hand” continues to provide emergency financial assistance to retirees. The program has provided grants to 14 individuals across the state totaling \$12,858.69 since July 2012.

Recently, the Foundation helped with needs such as insurance premiums, home repairs, and medical and electric bills. One retiree living in the Houston area who suffers from sleep apnea had an air conditioning unit that was no longer functioning properly or efficiently. With the temperatures rising and the risk of respiratory complications, the Foundation quickly purchased a new A/C unit and assisted with the installation cost so that the individual could have relief.

Although the program mostly benefits retirees, anyone who is eligible to receive a TRS annuity may apply. In April, the Foundation received an application from a Region Service Center employee who was in a tragic car accident.

Not only did this woman suffer the loss of both of her daughters in the accident, she endured severe injuries that left her disabled and in a wheelchair. Her entire home had to be reconstructed to permit wheelchair accessibility. Her inability to work further compounded the difficult financial situation she was facing. TRTF responded by awarding a \$1,000 grant payable to the building supply company to purchase supplies for her home reconstruction.

The Foundation is saddened to hear of the difficult circumstances retirees and others are facing. Providing support to those suffering a financial hardship is a priority. TRTF encourages anyone who might be experiencing emergency financial difficulties to please contact Beth Unite at the Foundation office. Beth may be reached at 1.800.880.1650X102 or by email at beth@trta.org. All applications are confidential.

Since the program’s inception in 2010, “A Helping Hand” has awarded \$38,000 in grants to 42 individuals.

TRTF Receives a \$5,000 Donation!

Recently, the Foundation received a generous donation from the law firm of Bernstein Litowitz Berger and Grossman LLP (BLB&G).

BLB&G has been the securities litigation monitoring counsel for TRS for a number of years, and has represented the fund in groundbreaking litigation which has not only benefitted the Teacher Retirement System of Texas, but investors everywhere. With this in mind, BLB&G was pleased to support the Foundation’s charitable efforts.

The Foundation would like to thank Ronnie Jung, TRTF trustee and former Executive Director of TRS, for reaching out to BLB&G and communicating our valuable programs and good works.

2013 TRTF SCHOLARSHIP AND GRANT RECIPIENTS

The Foundation's Classroom Assistance Grant program honors public school teachers whose dedication to their students is seen in the unique projects they create. All recipients received \$500. The 2013-2014 classroom assistance grant recipients are:

1. Alicia Ngala, a science teacher at Null Middle School in Houston.
2. Jackie Reily, a business teacher at the KEYS Learning Center in Euless.
3. Amy Baker-Kireev, a biology teacher at Texas High School in Texarkana.
4. Roxanne Hammonds, a Robotics facilitator at Frances Scobee Middle School in San Antonio.
5. Rachel Dearing, a broadcast teacher at Legacy High School in Mansfield.
6. Kathy Pittinger, a gifted and talented facilitator at Lakeland Elementary in Lewisville.
7. Lewis Johnson, a science teacher at Paul Haas Middle School in Corpus Christi. *Continued on next page*



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This year, the Texas Retired Teachers Foundation continued its Student Scholarship and Classroom Assistance Grant programs, increasing the number of scholarships and grants from ten to fifteen.

Student Scholarships are awarded to students majoring in education at a Texas college or university. They are also relatives of members of TRTA. We are pleased to announce the following 2013-2014 Student Scholarship recipients:

- Jonathon Williamson, related to Sherry and Charles Bradberry, members of the Nacogdoches Co. RTA, District 7.
- Rhonda Caldwell, related to Ronald Barnett, member of the Lamar-Delta RTSEA, District 8.
- Leah Doughty, related to John Doughty, At-Large member.
- Elise Harris, related to Joe & Deloris Bertino, members of West Grayson RSPA, District 10.
- Tara Warren, related to Betty Forrest, member of Odessa RT/SPA, District 18.
- Cydney Graves, related to Delia Hicks, member of Live Oak Co. RSPA, District 2.
- Ashley Metzler, related to Mary Peek, member of Houston ART, District 4.
- Stephanie Moreno, related to Anna Montemayor, member of Harlandale-S. Bexar Co. ERA, District 20.
- Samuel Moseley, related to Joyce Baker of the Denton Area RSPA, District 11.
- Alyssa Thornton, related to Cynthia Thornton, member of Anderson Co. RTA, District 7.
- Tracie Christian, related to Stacey Hervey, member of Mesquite ARSE, District 10.
- Brianna Bonnette, related to Billy Hall, member of Smith Co. RTSPA, District 7.
- Meredith Jones, related to Linda Renfro, member of Eagle Mt.-Saginaw RSE, District 11.
- Kyla Reeves, related to Annie Ruth Mitchell, member of Montague Co. RTA, District 9.
- Audrey McCambridge, related to Don and Carolyn Vardeman, members of Waco-McLennan Co. RTA, District 12.



WEST RELIEF FUND: TRTA MEMBERS SUPPORT EACH OTHER

The Foundation would like to thank all who have donated generously to the West Relief Fund. The support from our TRTA members has been overwhelming and speaks highly of the dedication our members have to our TRTA family. To date, the Foundation has raised over \$35,500!

The funds are being distributed to retirees who have lost their homes, automobiles, or have incurred medical expenses due to the explosion that devastated the small Czech community. Although most have insurance to cover the majority of the damage, some out-of-pocket expenses are not covered, such as deductibles, temporary living expenses, furniture and housewares.

Two TRTA members from West learned that their home, workshop and RV were declared totaled by the insurance company. Flying glass ruined all of their bedding, mattresses, and furniture as it became embedded from the force of the explosion. Although they are thankful that they were not injured, the thought of starting over during their retirement years has caused feelings of despair.



Another member's home was destroyed by the explosion. Due to the structural damage suffered, her home was declared a total loss. All furniture, small appliances and linens must be replaced. Yet another member was driving her car just five blocks away when the explosion struck. The car was severely damaged, though she was not injured. A fourth TRTA member's home was badly damaged, but can be repaired. Two active teachers working for West ISD asked for help paying for deductibles on their homes and cars, as well as home repairs not covered by insurance.



Due to your generous contributions, the Foundation was able to respond quickly to these individuals by awarding grants to help ease their unexpected financial burden. TRTF will continue to help our retirees affected by the explosion, as well as active school personnel in need. Any remaining funds will be distributed to West ISD.

If you know of anyone affected by the explosion, please encourage them to apply for help today. Please contact Beth Unite at beth@trta.org or by calling 1.800.880.1650X102 for an application. Anyone eligible to receive a TRS annuity and who is a resident of West, Texas may apply. Thank you again for your donations. Your contributions support our educators of the past, present and future!

2013 TRTF GRANT RECIPIENTS CONTINUED



8. Jeffrey Brooks, a special education life skills teacher at Anderson High School in Austin.
9. Kara Saldana, a music teacher at Cross Oaks Elementary in Crossroads.
10. Angela Marshall, a kindergarten teacher at Cross Oaks Elementary in Crossroads.
11. John Martinez, a fourth grade teacher at Elrod Elementary School in San Antonio.
12. Amanda Stevenson, a music teacher at Georgetown High School in Georgetown.
13. Martin Lenard and Ashley Crowder, music teachers at Hal Peterson Middle School in Kerrville.
14. Rachel Esquibel, a science lab teacher at John Paul Stevens High School in San Antonio.
15. Kathy Massey, a fine arts teacher at McLeod High School in McLeod.



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

2013 CONVENTION RECAP: ANNUAL FOUNDATION LUNCHEON A BIG SUCCESS!

The Foundation enjoyed the company of 300 guests at the Foundation Luncheon on April 10 at the 60th Annual TRTA Convention in Corpus Christi. Guest speaker Ronnie Jung gave a very motivating speech, challenging members in attendance to match his personal donation of \$1000. Donations received at the luncheon totaled an astounding \$11,434.61! The donations were announced during the luncheon and included memorials and honorariums to many individuals.



Trustee Carolyn Lance announced the Student Scholarship and Classroom Assistance Grant winners for the 2013-14 school year. A complete list of the recipients is included on pages 14-15. Further details may be found by visiting www.trtf.org. La Vonne Rogers shared good news about "A Helping Hand," reporting the number of grants awarded to date. TRTF State Coordinator Tim Lee revealed the Foundation's plans to record new video for active teachers, which will be produced using funds raised through the Legacy Campaign.

Foundation Coordinator Beth Unite conducted a training seminar for Foundation district liaisons and local unit Foundation representatives. New training guides were handed out during the session and are available online along with the PowerPoint presentation (trtf.org/index.cfm/resources).

At the TRTF exhibit booth, the Foundation held a prize drawing for a \$200 Exxon Mobil gift card. President Tom Pritchard announced the winner of the drawing during the House of Delegates. The winning ticket belonged to Glynda Phillips. Congratulations Glynda!

RENEW YOUR MEMBERSHIP TODAY!
CALL 800.880.1650

TEXAS RETIRED TEACHERS FOUNDATION

OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

TEXAS RETIRED TEACHERS FOUNDATION

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MEMORY OR
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PLEASE ACCEPT MY DONATION OF:

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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