

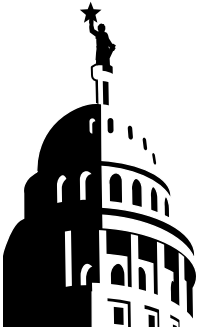
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TEXAS RETIRED TEACHERS FOUNDATION

OUTLOOK

TRTF Legacy Campaign Continues to Grow.

11-12

The VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

TRS-CARE TIME FOR A CHECK-UP?

By **Tim Lee, Executive Director**

In the previous two issues of *The VOICE*, our goal was to inform TRTA members of the growing threat against the TRS defined benefit pension plan and of the many reasons why TRS should not be under attack by these "reformists." The feedback has been amazing. TRTA members from all over the state are engaging elected officials, candidates, and the media to inform, educate, persuade, and push back against the attackers. Thank you for your hard work and getting involved.

TRTA has already exhausted our entire stock of extra news bulletins. Many of you have taken copies of *The VOICE* to teachers' lounges, local newspaper editors, and legislators. If you would like to distribute the two previous lead articles, contact us at 800.880.1650 or download *The VOICE* from www.trta.org.

TRTA members and education retirees are the best advocates in the state! While the groups that want to eliminate our TRS defined benefit plan may have extremely deep pockets and armies of lobbyists, TRTA has people! Our members are educated voters who actively persuade our families and friends about the issues that matter to us. The power to protect TRS benefits is in the membership. It takes every member, every TRS retiree, every active education employee, and everyone we know to push back against the efforts to eliminate the defined benefit plan.

**CONTINUED ON NEXT PAGE**

TRTA BEST PRACTICES

- **Join a local unit and partner with other retirees on legislative outreach! TRTA local units make up a powerful statewide network of grassroots advocates.**
- **Help build the TRTA membership! TRTA has a membership that exceeds 72,000 members, but there are over 300,000 TRS retirees in Texas! We need to get all TRS public education retirees involved in protecting and improving their benefits.**
- **Meet with your legislators in their district offices! Now is the time to schedule an appointment. Use the TRTA advocacy guides and news bulletins to prepare for your visit and deliver our message about protecting and improving TRS!**
- **Send a personal letter or email to your legislator(s) asking them to support the TRTA legislative program (use TRTA Advocacy Guide from this or the previous bulletin).**
- **Tell active school employees we need their help to protect TRS.**
- **Contact your local media. Write a letter to the editor of your local newspaper promoting TRS and/or be part of the TRTA rapid-response team! (see our “Help Wanted” ad on page 5)**
- **Sign up for the *Inside Line* email update service (www.trta.org)! TRTA wants to keep you informed about your TRS benefits. The *Inside Line* is free, informative, and provides action-based messages to all subscribers. See details about our other social media options on page 5.**

Now is the time for action. In this issue, you will find a TRTA Legislative Survey; information about the TRTF Legacy Campaign; a special message from TRTA President Herbert Norris about the upcoming TRTA Convention; and a fact page about the TRS-Care health insurance program. Finally, be sure to check out the “Help Wanted” ad on page 5.

TRTA Priority Overview: TRS-Care

TRTA is actively defending the TRS defined benefits program, but this is not the only issue we are working on for you. One of the most important benefits available to retirees is the TRS-Care health insurance program. This program covers more than 230,000 TRS retirees and dependents. Last session, TRS reported that the program had a \$700-plus million reserve. Legislators were also told that the program was using that reserve quickly and that it may be depleted by 2014.

That news concerns TRTA, as we have worked over the last four sessions

to keep premiums from increasing. Preventing premium increases helped to offset the impact of not receiving a true cost-of-living increase. Legislators worked with TRTA to keep these premiums in check, saving retirees thousands of dollars over the past eight years.

Last session, state budget cuts affected TRS-Care. The legislature reduced funding by 50% for the second year of the biennium. This reduction is burning through the program’s reserve funds more quickly than anticipated. This predicament could have been worse, but several long-time friends in the Texas Legislature helped restore funding for the first year of the biennium.

The state would have shorted TRS-Care both years if not for the federal program known as the Early Retiree Reinsurance Program (ERRP). TRS was able to participate in this program as long as the state demonstrated “maintenance of effort” in its funding. This helped budget writers agree to at least one

year of standard funding for TRS-Care. However, ERRP projections indicate the fund will be exhausted by 2013. Without this incentive to capture federal funding, the state cut the TRS-Care appropriation for 2013. Overall, TRS qualified for about \$70.6 million in federal reimbursements at a time when proposed cuts could have been much worse.

Still, TRS-Care did not receive as much funding as it should receive according to statute. With the increased pressures of rising medical costs and more participants, TRS-Care is projecting a \$26 million shortfall by 2014.

These projections are motivating an aggressive advocacy effort on behalf of TRTA and its membership. We have done a great job keeping this program intact. If we are to maintain this vital health insurance program, we need to educate the legislature on how necessary it is, **and that it must be funded to protect plan participants.**

TRS retiree premium increases should not be the basis for raising the revenue needed for TRS-Care. TRS-Care participants have not had a premium increase for almost 8 years, but no cost-of-living increase in almost 12 years! With pension income stagnant, the state must consider higher appropriations for the TRS-Care program to keep it viable.

Now is the time for you to get involved on this critical issue. A fact page about the TRS-Care program can be found on page 4. A sample letter to use to write to your legislators is on page 5. Let’s educate legislators on this issue now, so we can better protect TRS-Care next session.

Less than a Year to Go! While it is easy to think 83rd Texas Legislative Session is still a year away, the reality is that we have to act now. Now is the best time to meet with your legislators, be involved with your local units, and be aware of local media reports on the TRS pension benefit plan. Be sure to refer back to this issue of *The VOICE*

for information you can use with legislators, media, fellow TRS retirees and active school employees.

TRTA is launching numerous legislative and media outreach efforts in the coming year. We know that your help will be vital. It is clear that TRS Texas and the current benefit structure for current and future public education retirees is under attack. TRTA's response to this challenge is crucial to protecting your pension benefits.

The interim between Texas legislative sessions may seem like a lull to TRS retirees; but in truth, the year before the legislative session is CRITICAL to our legislative programs. As you consider your involvement, please consider the TRTA best practices which you can do now to prepare for the upcoming legislative session (see page 2). Thank you for all you do to support TRTA. ★

TRS-Care Sample Letter

Dear (Senator or Representative),

I am a retired public education employee with (number of) years of service. I am also a member of the Texas Retired Teachers Association (TRTA), the largest organization of retired public education employees in Texas. We are the voice for over 300,000 TRS retirees.

Last session, the Texas budget was under tremendous pressure. Many programs were cut and you were faced with very difficult decisions. Your hard work to protect the Teacher Retirement System of Texas is appreciated greatly.

The funding levels for both the TRS pension trust fund and the TRS-Care retiree health insurance program were reduced as part of the overall budget. While we know you did what you could to protect these vital programs, we must ask that you revisit the funding requirements for both.

TRS-Care, a health insurance plan sponsored by TRS and paid for in large part by retiree premiums and other sources, may have serious funding challenges next biennium. This program is critical to the well-being of over 230,000 Texans, most of whom served dutifully in public education their entire careers.

TRS projects funding shortfalls for TRS-Care may be as much as \$334 million by the end of FY 2014, and as much as \$982 million by the end of FY 2015.

Without legislative intervention, TRS has only one alternative: raising TRS retiree premiums. Plan participants already pay very high premiums to participate in this health care plan, as well as co-pays, deductibles and prescription costs. In addition, major plan design change is a cost-shifting measure that forces plan participants to carry more of the load.

The Texas Legislature, TRTA, and TRS-Care plan participants have all worked together to maintain this program in an efficient and cost-effective way. It has been a successful partnership for over 25 years! We must continue to work together and find additional funding to keep this program strong.

TRS retirees are ready to help solve this funding challenge. We need your help and support to keep TRS-Care strong. Will you please assure me, as a TRS-Care participant and your constituent, that you will work with TRTA to help meet this challenge?

Thank you,
(Signature)

TRTA LEGISLATIVE SURVEY

Mail completed survey to TRTA, Attn: C. Sharp, 313 E. 12th Street, Suite 200, Austin, TX 78701.

Survey also available online www.trta.org/survey.

I am:

51-61 62 or greater

I have been retired:

1-5 years 6-10 years 11 or more

My TRS career (or combined education employment) is:

less than 15 years 16-20 years

21-25 years 26-30 years

30-35 years 35 or more years

Please rank your priorities for the upcoming 83rd legislative session in order of importance (with 1 being the most important, and 5 being the least important):

Improve TRS pension funding

Protect TRS-Care premiums and benefit structure

Pass a supplemental payment

Provide a pension increase

Defeat any legislation on making TRS a defined contribution plan

Other, please specify _____

How much do you receive in Social Security income per month? _____

I am impacted by the following federal Social Security provisions: GPO WEP not sure

How often do you contact your Texas state elected officials (check one):

Once per month

Once every 3 to 4 months

Once per year

Never

I do not know who represents me in the Texas Legislature

What method do you prefer when communicating with your legislators in order of importance (with 1 being the most preferred, and 5 being the least preferred)?

Email

Phone call

Personal visit

Postal mail

TRTA Inside Line Action Alert

Issue: Adequately fund TRS-Care, ensuring that plan participants will not suffer drastic premium increases and plan design will not shift more cost onto retirees.

Background: TRS-Care is a pay-as-you-go, self-insured state-sponsored health insurance plan administered by the Teacher Retirement System of Texas (TRS). Formed in 1986, it provides health insurance coverage to over 230,000 retirees and dependents.

TRS-Care is supported by numerous funding sources. The largest contributor is the insured group of retirees and dependents. Plan participants pay premiums, and cover costs such as co-pays, deductibles, and prescription drugs.

TRS-Care also receives funding from the state, active school employees, school districts, Medicare reimbursements, and more. A funding chart is provided below.

While TRS-Care is maintained with great administrative efficiency, medical care costs continue to rise. These costs outpace the revenue growth from active employees, a major source of funding. Over the past four legislative sessions, premiums have not increased, saving retirees thousands of dollars at a time when their annuities have been stagnant.

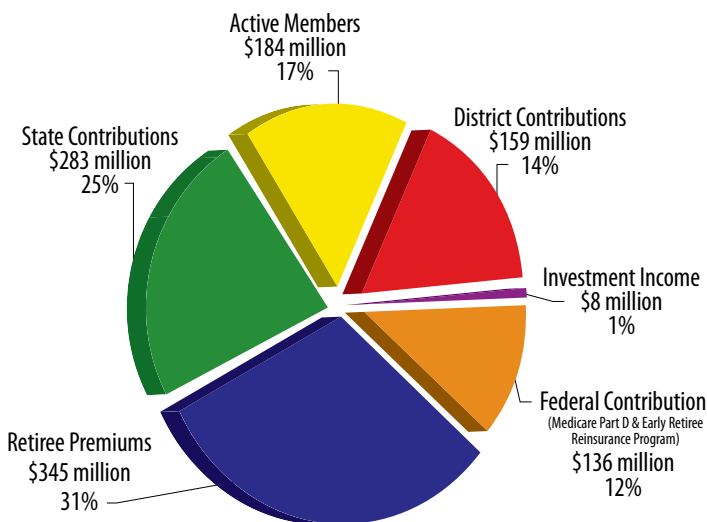
Last session, the Texas Legislature fully funded TRS-Care for 2012, but reduced funding by half for 2013. This has accelerated use of TRS-Care reserves. Projections show that TRS-Care will completely exhaust its reserves by 2014.

TRS-Care Facts and Figures

TRTA Position: Fund TRS-Care in a way that does not increase retiree premiums and current benefit levels are maintained.

TRTA is calling on the Texas Legislature to fund any shortfall with the TRS-Care program. TRS retirees last received a benefit increase via a one-time supplemental payment in 2008 (authorized by the 80th Legislature in 2007). At that time, many TRS retirees used the payment for medical expenses. They have not had a permanent increase in their pension benefits since 2001. Premiums for Medicare have increased over the past decade and many retirees must choose between paying for medical care or other essentials. The implementation of massive premium increases for plan participants would be devastating.

TRS-Care plan design change would also create major financial hardships on retirees. Solutions for TRS-Care should start with increased state funding, as well as working with all sources to maintain affordable care through our hospital and physician networks. Plan revenue is based largely on educator payroll growth. Given the state of public school funding, TRS-Care will be greatly challenged to stay ahead of medical trend costs. Additional state funding is a needed to keep this program affordable.



**Comments/questions, contact Tim Lee, Executive Director
800.880.1650 • tim@trta.org • www.trta.org**

PRESIDENT'S LINE



TRTA President Herbert Norris

Happy New Year to all of my fellow members of the Texas Retired Teachers Association! I hope you enjoyed your holiday break and are ready for a busy and active 2012.

In a few short weeks, many of us will be gathering for our 59th annual convention in Houston. If you haven't reserved your room yet, do it today. You won't want to miss the informative and fun breakout sessions, our inspiring keynote speaker Joni Rodgers, or Tim Lee's important legislative updates.

For those of you serving as a delegate for your local unit or district, convention is a time of the utmost significance. Your presence this year is needed as we discuss several bylaws amendments that will determine the future of our organization.

As your President and a representative of the Board of Directors, I want you to know that now is the time to consider these issues and make your voice known. TRTA has big goals it is trying to accomplish to promote the value of the defined benefit plan and the tremendous worth public education retirees provide to the state of Texas.

This is a big job. As a delegate and a leader, this job falls first into your hands. You must come ready to listen, discuss and vote! Please review the amendments found on pages 6-9 of *The VOICE*.

As Tim Lee mentions in the Foundation article (page 15), your legacy is the reason our organization exists. We want to sustain and improve public education, and preserve TRS for ourselves as well as future retirees. We thank you for being a part of the largest public education retiree group in the nation and helping us make that possible!

HELP WANTED!

Volunteer Writers Needed for Advocacy Effort

TRTA uses multiple sources for communicating with elected officials. Now, we want to improve our primary email outreach tool. Thousands of TRTA members participate in our *Inside Line* email campaigns. We are looking for volunteer writers to draft advocacy messages. Training and reimbursements will be provided; however, this is a volunteer position.

If you have good writing skills, a passion for direct messaging, are willing to work closely with the TRTA State Legislative team, and are comfortable with basic word processing and email, we want you! Please send an email to Cindee Sharp (cindee@trta.org), including a writing sample of 250-300 words and a short paragraph about why you want to be a TRTA advocacy writer. Deadline: April 30, 2012. ✉

Get Connected. TRTA and TRS on the web.



As the watchdog for your pension fund, the Texas Retired Teachers Association (TRTA) keeps you up-to-date on the latest retirement news in Texas and around the nation. With a growing internet presence (trta.org), TRTA has expanded its resources to include an e-newsletter called the *Inside Line*, a Facebook page, and a Twitter feed. Find us on Facebook and search for Texas Retired Teachers Association.

- ▶ Follow TRTA on Twitter: www.twitter.com/TRTA
- ▶ Sign up for the Inside Line: www.trta.org/InsideLineSignup.cfm

The Teacher Retirement System of Texas (TRS), the state agency that manages your pension fund, is also increasing its social media presence. You can now find TRS on Facebook, YouTube, and Twitter. Use these features to discuss the TRS pension plan, health benefit programs, and administration and operations. Also, the TRS web site (trs.state.tx.us) is an excellent resource for downloading annuitant-specific information, watching webcasts of TRS board meetings, and downloading informative publications. Look for the Quicklinks on the right hand side of the page.

- ▶ TRS Facebook: www.facebook.com/TeacherRetirementSystemofTexas
- ▶ TRS YouTube channel: www.youtube.com/trsoftexas
- ▶ TRS Twitter: www.twitter.com/trsoftexas
- ▶ A Great Value for All Texans: www.trs.state.tx.us/about/documents/trs_value_brochure.pdf
- ▶ TRS Benefits Handbook: www.trs.state.tx.us/benefits/documents/benefits_handbook.pdf#Home



2012 TRTA PROPOSED BYLAWS AMENDMENTS

If adopted, the indication of change for each amendment is deleting content by striking through and adding content by underlining.

AMENDMENT 1 If approved, the TRTA Convention would be conducted in even numbered years.

Article VI: HOUSE OF DELEGATES

Section 2, Sentence 2

~~An annual~~ A TRTA Convention shall meet in even numbered years for the purpose of

Article VIII: NOMINATIONS, ELECTIONS AND INSTALLATION

Section 2, Sentence 1

The House of Delegates shall elect the officers by secret ballot at the ~~annual~~ TRTA Convention.

Article IX: BOARD OF DIRECTORS

Section 2.1

The TRTA Board of Directors shall:

1. Conduct TRTA business, between ~~annual~~ conventions, subject to the bylaws and instructions of the House of Delegates;

Article IX: BOARD OF DIRECTORS

Section 3, Sentence 1

The Board of Directors shall meet at the beginning and at the close of the ~~annual~~-TRTA Convention, with a minimum of four additional regular meetings per year, and at any other times specified in the bylaws.

Article XI: COMMITTEES

Section 3

Each chairman of a standing committee shall submit to the Board of Directors a plan of action for the ensuing year and to the House of Delegates at the ~~annual~~ TRTA Convention a written report of the committee's work.

Article XIII, Section 2

The Board of Directors shall engage a parliamentarian to assist the Board and the House of Delegates during the ~~annual~~ convention.

Article XV, Section 1

Proposed amendments to be considered by the Organizational Affairs Committee shall be made through a Local Unit or a TRTA District and shall be submitted to the TRTA office by November 1 of the odd-numbered year.

Article XV, Section 2, 5

The Organizational Affairs Committee shall:

5. Forward the proposal and the Committee's recommendation to the Board of Directors by January 1 of the even-numbered year.

Proviso: This amendment would become effective July 1, 2014.

Maker: District VI

Contact Individual: Mary Sue Ribardo, District VI President

Maker's Rationale: Because the first priority of TRTA should be to emphasize legislative interaction, a convention in years in which the legislature is in session takes away both emphasis and funds from this priority reducing the power of TRTA influence on the legislative session. The average \$120,000 convention cost would be better spent on legislative interaction. This would also afford local units an opportunity to save for sending delegates to the convention.

OAC Recommends: Disapproval

OAC Rationale: The result would be an increased centralization of the organization with a reduction of local unit and member involvement. If cost reduction is needed, selection of less expensive convention locations may be worth the attendant inconvenience. An alternative to annual convention leadership training has not been indicated.

Board of Directors Recommends: Approval

Board of Directors Rationale: Because of the growing costs of conventions and the difficulty of finding venues which can accommodate the size of a TRTA Convention, it behooves the organization to look for alternatives. The Board believes that this plan of biennial conventions, if coupled with a plan such as Amendment 3, is a viable alternative. This plan could go into effect in 2014, be tried for 4 years and then be evaluated by the membership to determine whether to continue or to revert to an annual convention. As conventions are averaging a cost of \$120,000 for TRTA each year, we can expect this to save costs. Since District Presidents Leadership Training and District Spring leadership meetings will continue annually, no lack of training should occur. If the Board of Directors continues to seek regular and effective communication with the districts and local units, no increase in centralization should occur.

AMENDMENT 2 If approved, TRTA officers would serve two-year terms.

Article VII, Section 2

1. The officers elected by the House of Delegates shall serve ~~one-year~~ two-year terms, coinciding with the fiscal year, with no subsequent consecutive term. ~~Officers shall be eligible for reelection to one (1) subsequent consecutive term.~~
2. The appointed officers shall serve ~~one-year~~ two-year terms and, except for the Legislative Coordinator, shall be eligible for reappointment not to exceed four (4) consecutive years.

Article VIII, Section

1. Secret ballot shall determine election for a term of ~~one (1)~~ two (2) years, with no subsequent consecutive term.

Proviso: This amendment would become effective July 1, 2014.

Maker: District VI

Contact Individual: Mary Sue Ribardo, District VI President

Maker's Rationale: Since local unit and district officers serve a two-year term, state elected officers should serve in a consistent manner.

OAC Recommends: Disapproval

OAC Rationale: The result would be an increased centralization of the organization with less local unit and member authority for effective oversight of TRTA. Some local units and districts may continue an annual election schedule, which could possibly hinder collaboration with TRTA.

Board of Directors Recommends: Approval

Board of Directors Rationale: Passage of this amendment is necessary if Amendment 1 passes. However, even if Amendment 1 does not pass, there may be merit in electing officers for 2-year terms, since, in reality, it is usual for officers to serve 2-terms after having been elected.

AMENDMENT 3 If approved, an extended rally event would be conducted

Article VI, Section 3 (Additional section)

In years when the state legislature is in regular session, the TRTA Board of Directors will plan an extended rally event in Austin for the purpose of:

1. Allowing TRTA members to deal more directly with the legislature and the governor concerning issues of interest to retired teachers.
2. Giving members an opportunity to meet socially, to exchange ideas, and to be better informed of TRTA activities.
3. Publicizing the activities of TRTA.
4. Building relationships and alliances with other educational organizations, senior associations and appropriate state agencies.

Maker: District VI

Contact Individual: Mary Sue Ribardo, District VI President

Maker's Rationale: Being in Austin during the legislative session is top priority for TRTA. Having an extended rally event during legislative years will provide the opportunity for TRTA's voice to be heard. The extended rally event also encourages more direct participation by our members than a convention since no limit on the number of participants will exist as it does with delegate limits.

OAC Recommends: Disapproval

OAC Rationale: The Legislative Committee, the Board of Directors and the TRTA staff presently plan and conduct a successful lobby day rally. A mandate is not necessary to continue this success. An extended rally event, involving additional days and activities, could present both financial and time difficulties for members traveling a significant distance to be in Austin. There is no indication of the cost of such an event to TRTA or to members.

Board of Directors Recommends: Approval

Board of Directors Rationale: If Amendment 1 passes, this amendment provides a state level event for the alternative years. Although the Board and staff would plan the rally events, a possible prototype might be:

- Day 1—Travel, public reception for attendees and invited legislators and Legislator Contact training
- Day 2—Legislative breakfast with legislator recognition, discussion of priorities with legislators; Gallery appearances; legislative visit; public presentation on steps of the Capitol; and Amy's ice cream—Travel home or spend the night.

Such an event should encourage greater participation by members since there is no delegate restriction.

This year, it is especially important that all delegates attending the TRTA Convention stay until the House of Delegates meeting adjourns. Delegates will be considering a variety of important amendments that require conscientious attention and feedback. We appreciate the dedication our delegates give to TRTA and we thank you for your time. 🇺🇸

AMENDMENT 4 If approved, TRTA annual dues would be \$33.

Article IV, Section 4

Annual dues of both Active Members and Associate Members shall be ~~twenty-five dollars (\$25.00)~~ thirty-three dollars (\$33.00), two dollars (\$2.00) of which shall be rebated to the respective TRTA District.

Proviso: This amendment would become effective July 1, 2013.

Maker: District II

Contact Individual: Margaret De Ville, District II President

Rationale: TRTA dues have not been increased since 1999. Inflation and increased membership have escalated costs for operating and providing member services. Being proactive in the battle to defend the defined benefit pension program will require financial resources. This increase keeps an equal amount for all forms of payment. Members should be unified in primary legislative and organizational outreach goals. This maintains a level of equality and fairness, particularly for those not eligible for payroll deduction.

OAC Recommends: Disapproval

OAC Rationale: Since the last dues increase, TRS retirees have received one additional stipend which amounted to less than 1% per year over that time period. The proposal would be a 32% dues increase per year. Increase in membership since 1999 has increased TRTA dues collected by more than one-half million dollars per year. The need for a dues increase should be accompanied by transparent indication of the financial need. This would affect a large number of TRTA members who are not permitted a delegate voice to vote on an increase.

Board of Directors Recommends: Approval

Board of Directors Rationale: Although it is true that TRTA retirees have not received an increase in their annuity in eleven years, it is not due to a lack of effective effort on the part of the organization; it is due to the law requiring actuarial soundness of the TRS fund before the Legislature can grant an additional payment. In the one year in which actuarial soundness was achieved, TRTA successfully achieved a 13th check from the Legislature. During the years since 1999, when the current dues were enacted, TRTA has increased membership by more than 40%. In order to serve this increased membership, staff has been increased as well as operating expenses. In addition, TRTA, as an organization, needs to provide increased and more sophisticated services to members and to explore new public relations areas and increased training initiatives for legislative effectiveness. Finally, the national move to do away with the defined benefit program is an increasing threat and one which will be expensive to counteract. Although it is impossible to specify an exact financial need, TRTA must be prepared to move quickly and effectively. The dues increase will give us that capability. The TRTA Board and staff pledge that we will continue to be fiscally responsible to the membership in the use of these increased funds.

AMENDMENT 5 If approved, TRTA annual dues would be \$30 and \$36.

Article IV, Section 4

Annual dues of both Active Members and Associate Members shall be ~~twenty-five dollars (\$25.00)~~ thirty dollars (\$30.00) for payroll deduction or bank draft and thirty-six dollars (\$36.00) for annual dues payment, two dollars (\$2.00) of which shall be rebated to the respective TRTA District.

Proviso: This amendment would become effective July 1, 2013.

Maker: District XV

Contact Individual: Nancy Byler, District XV

Maker's Rationale: TRTA dues have not been increased since 1999. Inflation and increased membership have escalated costs for operating and providing member services. Being proactive in the battle to defend the defined benefit pension program will require financial resources. Local Units and TRTA will have a higher retention rate, which will save the cost of soliciting renewals with this strong incentive to use payroll deduction or bank draft. The greater number of continuing members will allow local units to devote more time and effort to recruiting new retirees.

OAC Recommends: Disapproval

OAC Rationale: Since the last dues increase, TRS retirees have received one additional stipend which amounted to less than 1% per year over that time period. This would be a 20% to 44% dues increase per year. Increase in membership, since 1999, has increased TRTA dues collected by more than one-half million dollars per year. The financial need for a dues increase should be accompanied by transparent indication of that need. This would affect a large number of TRTA members who are not permitted a delegate voice to vote on the amendment. A member paying by check or cash would pay \$6 more than a member paying by payroll deduction or bank draft. Through payroll deduction or bank draft, TRTA would not receive all of the amount until months after the fiscal year starts.

Board of Directors Recommends: Disapproval

Board of Directors Rationale: Although a dues increase for TRTA is called for at this time, the structure outlined in this amendment appears to have an excessive disparity between the cost to a continuing member (cm) and an annual payment member. Therefore, the board recommends approval of Amendment 4 and disapproval of this amendment.

AMENDMENT 6 If approved, \$10 would be collected for Local Unit dues.

Article IV, Section 5 (Additional section)

5. The Association operates with a system of inclusive dues whereby \$10 annually is assessed in addition to the state dues for all members except Life members.

- a. Members will specify the local unit to which they wish to belong. If the member does not specify a local unit, the state office will assign the member to the local unit geographically closest to the member's place of residence.
- b. If dues are paid to the local treasurer, \$10 will be retained for local use and the balance will be sent to the TRTA office.
- c. If dues are paid directly to the state or through payroll deduction or bank draft, the state office will send the local unit a rebate of \$10 on a monthly or quarterly basis for each new member received during that period.
- d. There will be no at-large members and all members will be counted in the determination of convention delegates.

Maker: District X

Contact Individual: LaWynn Rogers, District X President

Rationale: This simplifies the explanation of dues and of membership categories. This allows time, money and energy to concentrate on enlisting new members instead of the annual effort to enlist TRTA members who are not local unit members. Local units presently charging more than \$10 dues would not be penalized because of the increase in members who didn't previously pay local unit dues and will increase financial resources for local units with dues less than \$10. Members not currently belonging to local units will be able to receive pertinent information from local units and districts. Research indicates that an initial TRTA membership loss will be recovered within three years.

OAC Recommends: Disapproval

OAC Rationale: It is questionable if local unit dues would meet the requirement for payroll deduction. Even exploring this could cause unwanted attention to the dues deduction system that TRTA enjoys. Some districts assess dues in addition to the \$2 TRTA rebate. The additional district dues assessment is not included in this proposal. This amendment would affect a large number of TRTA members who are not permitted a delegate voice to vote on this proposal.

Board of Directors Recommends: Further Study

Board of Directors Rationale: Although the Board is intrigued by this concept, it has become aware of possible legal problems created by the statute which enables payroll deductions of TRTA dues by TRS. Therefore, the Board recommends that this amendment and its ramifications be studied further.

AMENDMENT 7 If approved, three TRTA Standing Committees would be combined into one committee.

Article XI, Section 1

The standing committees of TRTA shall be Audit, Community Volunteer Service, Finance, Health Care, Informative and Protective Services, Leadership Training, Legislative, Member Benefits, Membership, Organizational Affairs, Public Relations, and Retirement Education.

The standing committees of TRTA shall be Audit, ~~Community Volunteer Service, Finance, Health Care, Informative and Protective Services,~~ Community, Health, Informative and Protective Services, Leadership Training, Legislative, Member Benefits, Membership, Organizational Affairs, Public Relations, and Retirement Education.

Maker: District X

Contact Individual: LaWynn Rogers, District X President

Rationale: The new committee would provide information regarding volunteerism, health care and safety concerns. The money, time and energy saved could be used to enhance retirement education to active school personnel and to inform and retain members in TRTA. Associate members join for the benefits offered, including current legislative information, member discounts and fellowship. The Community Volunteer Service Committee provides information about volunteering and collects volunteer hours. Those who volunteer do so out of personal passion and will volunteer whether or not the hours are counted. The Health Care Committee provides information related to maintaining one's health and collects steps/miles. Members exercise whether or not the number of miles walked is recorded. The Informative and Protective Services Committee shares pertinent information. This information is available through many sources, including literature, internet and television. The combined committee might be referred to as CHIPS – community, health, informative and protective services.

OAC Recommends: Disapproval

OAC Rationale: This could result in a reduction in service to members. A reduction in committee costs is needed, it might be significantly reduced by use of teleconferences, webinars and other electronic media for meetings. This could be done without a loss in member support. Expanding the standing committees' charges to support, rather than reducing the available talent to serve, should be the TRTA vision. Local units and districts would not have the same committees as TRTA to work with as counterparts.

Board of Directors Recommends: Further Study

Board of Directors Rationale: Service at the state level on committees is a major way that member involvement and contribution to TRTA are achieved. In addition, state committees are training grounds for future leadership at the state, district and local levels. However, the rationale offered by the maker of this proposed amendment raises valid questions about committee effectiveness and relevance. Consequently, the Board recommends further study.

COUNTDOWN TO THE FUTURE

59th Annual TRTA Convention!

Over 1000 TRTA members will join us March 25–27 at the Westin Galleria in Houston for our 59th Annual TRTA Convention! We are expecting a large crowd this year and have already booked the Westin Galleria hotel.

If you still need to reserve a room, please contact the Westin Oaks Hotel at 713.960.8100. The sister property to the Galleria is adjacent to the mall and is near the popular food court and ice skating rink. The same special TRTA group room rate still applies and ends February 24, 2012.

When you arrive on March 25, enjoy the first of many special events. TRTA has arranged for our members to attend a discount party at Charming Charlie's, a store selling jewelry, purses and other accessories. Between 3:00 and 5:00 p.m., our members can receive a 20% discount at the store by showing their convention badge. Free refreshments will be provided. Please RSVP Cindee Sharp at cindee@trta.org if you would like to attend. TRTA will also be selling limited quantities of promotional items, only available during the convention.

The Officers Welcoming Reception begins at 6:00 p.m. and is free. Attendees must present a ticket to attend. Your RSVP ensures that we will have enough food for everyone and enables us to provide a comfortable environment with space to seat all of our guests. The reception will feature the musical entertainment of the Richard Davis International Jazz Quartet.

Following the reception is a Sunday Stroll, being hosted by members of District 4. This is a wonderful opportunity to take a walking tour of the Galleria Mall and become familiar with its numerous amenities. Join us at 8:15 p.m.

We will begin our day on March 26 at 8:30 a.m. with the boisterous oration of bestselling author Joni Rodgers at our Opening Ceremonies. Joni speaks to a variety of audiences, delivering moving, motivational and fall-off-your-chair funny keynotes on survivorship. A talented performer and a consummate pro, Joni has a high-energy rollercoaster style of speaking that brings laughter, tears, and meaning to events of all kinds.

The Texas Retired Teachers Foundation will host its annual luncheon on March 26 when TRTF State Coordinator Tim Lee will update members on the success of its three charitable programs and the path of the new Legacy Campaign.



In the afternoon, we have several hours of informative and fun breakout sessions. Some highlights include Brain Growth and Repair by Dr. Louise Hayes, The Value of Investing: How to Protect Your Investments featuring Bob Elder of the Texas State Securities Board, and The Sam Houston Movie: Behind the Scenes.

In the evening, the TRTA banquet begins at 6:30 p.m. and will feature the vocal trio the Champion Sisters. The sisters—Molly and identical twins Brenda and Sandra—showcase their vocal talents through music ranging from swing to jazz, rhythm and blues to folk, big band to Contemporary Christian and country-western.

On Tuesday, March 27 a full day of business activities begins with the House of Delegates meeting at 9:00 a.m. A legislative luncheon will be held at 12:15 p.m. to update members about the fight to preserve public pensions. One of our special guest speakers is Texas State Representative Dan Huberty (District 127), a member of the House Public Education Committee and a Humble ISD school board member for five years before being elected to state office. The House of Delegates resumes promptly at 1:30 p.m.

District 4 Convention organizers have arranged for several entertainment opportunities outside of the hotel. If you arrive early on March 24, the Rockets and Mavericks will be playing at the Toyota Center. You may buy game tickets and a round-trip bus ride for \$45.00. If you would like to attend, your reservations should be made soon. Make checks payable to TRTA District 4 and mail them to Marcy Cann, 1326 Seaspray CT, Houston, TX 77008. If you have questions, call Marcy at 713.410.2147 or email mcann@att.net.

A TRTA discounted rate has been secured to attend the King Tut Exhibit at the Museum of Fine Arts. Visit www.kingtut.org/trta to purchase tickets. Each person should make his or her own arrangements. The cost for a one-way trip with Yellow Cab for one to six people is approximately \$15.

Memorial Park is also nearby and is an ideal location for playing golf. We hope you will take advantage of the many exciting entertainment and recreational activities in the area! One thing is certain: this is an event you will NOT want to miss! ★

CONVENTION SCHEDULE

Sunday, March 25, 2012

10 a.m. – Noon	TRTA Board of Directors Meeting
11 a.m. – 6 p.m.	Delegate Certification/Registration
10 a.m. – 6 p.m.	Exhibits
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
8:15 p.m.	"Sunday Stroll in the Mall"

Monday, March 26, 2012

6:30 – 8 a.m.	Ticketed Breakfast
8 a.m. – 5 p.m.	Exhibits, Delegate Certification/Registration
8:30 a.m. – 10 a.m.	Opening Ceremonies
10:15 a.m. – 11 a.m.	District Caucus Meetings (Districts 1–10)
11:15 a.m. – Noon	District Caucus Meetings (Districts 11–20)
12:15 – 1:15 p.m.	Foundation Luncheon or Ticketed Lunch
1:30 – 2:30 p.m.	Breakout Sessions I
2:45 – 3:45 p.m.	Breakout Sessions II
4 – 5 p.m.	Breakout Sessions III
6:30 – 8:30 p.m.	Banquet

Tuesday, March 27, 2012

6:30 – 8 a.m.	Stilwell Breakfast or Ticketed Breakfast
8 – 9 a.m.	Delegate Certification/Registration
9 – 10:30 a.m.	First Meeting of House of Delegates
10:45 a.m. – Noon	First Meeting of House of Delegates Resumes
12:15 – 1:15 p.m.	Legislative Luncheon or Ticketed Lunch
1:30 – TBD	Second Meeting of House of Delegates
TBD	TRTA Board of Directors Meeting

WHAT IS ON THE MENU?

Officers Reception

Buffet-style carving stations – one of Baron of Beef and one of Ham, addition of house salad, a potato dish and grilled or steamed mixed veggies, rolls, coffee and tea

Foundation Luncheon

Chicken Primavera, Classic Caesar Salad, Chef's choice starch and veggie, Carrot Cake, coffee and tea

Banquet

Salad, Grilled 6 oz Filet of Beef, port wine reduction, Chef's choice of starch and veggies, rolls, Amaretto Cheesecake coffee and tea

Stilwell Breakfast

Scrambled eggs, bacon, hash browns, assorted breakfast breads, orange juice, coffee and tea

Legislative Luncheon

Chicken breast crusted with artichokes, string mozzarella and sun dried tomatoes, charred red pepper cream, Chef's choice of starch and veggies, Galleria salad, Chocolate cake, coffee and tea

Ticketed Breakfast

Scrambled eggs, bacon (on March 26) and sausage (on March 27), whole fruit, selection of breakfast breads, coffee and tea

Ticketed Lunch

Caesar salad, lasagna, chef's choice of vegetable, bread, pecan pie, coffee and tea (on March 26)

Seasonal greens, Salisbury steak, chef's choice of vegetable, bread, chef's choice of dessert, coffee and tea (on March 27)

Legislative Luncheon Guest Speaker Rep. Dan Huberty



Opening Ceremonies Guest Speaker Joni Rodgers



Banquet Entertainment Champion Sisters



MEMBERSHIP MATTERS

Let's make that our motto as we move into the spring and get ready for another membership drive for TRTA. Membership matters because members give TRTA strength when dealing with legislators about issues that are vital to retirees. Members provide the organization with feedback, ideas and strategies for being a better organization. Members give grassroots leadership which provides TRTA with vitality. Members support one another and provide an outlet for contributions at the local level. Members make retired educators visible in the community and across the state. Members are the backbone of TRTA!

I hope you are already working on plans for your membership drive and that you are planning to attend the TRTA Convention in Houston March 25–27, where training sessions will provide additional ideas for making your membership drive successful. I hope to see you there.

—Maridell Fryar, TRTA First Vice-President/Membership

CONVENTION PRE-REGISTRATION FORM

PRE-REGISTRATION DEADLINE: MARCH 1, 2012

- ⊙ Mail completed form with payment to: TRTA
Attn: Accounting • 313 E. 12th St., Ste. 200 • Austin, TX 78701
- ⊙ Banquet, Breakfast and Lunch tickets sold only in advance.
- ⊙ Requests for refunds **MUST** be received in the TRTA office by March 1, 2012. No on-site refunds will be issued.
- ⊙ On-site registration per person \$25.00.

ONE REGISTRANT PER FORM – PLEASE CHECK ALL BOXES THAT APPLY.

Name (Last/First)		TRTA ID	
Address			
City		State	Zip
Phone		Email	

Pre-Registration Fee

<input type="checkbox"/> Pre-Registration (Deadline March 1, 2012) \$20.00 per person	\$ _____
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Special Events

<input type="checkbox"/> Complimentary Ticketed Event – Officers Welcoming Reception (Sunday, March 25, 2012, 6 – 8 PM) Check box if you will be attending the event. Include number of NON-REGISTRANT GUESTS attending. _____	Complimentary Ticketed Event \$ _____
<input type="checkbox"/> Free Guided Tour – Sunday Stroll in the Mall (Sunday, March 25, 2012, 8:15 PM) Check box if you will be attending the event.	\$ Free Guided Tour _____
<input type="checkbox"/> Foundation Luncheon (Monday, March 26, 2012, 12:15 – 1:15 PM) \$30.00 per person	\$ _____
<input type="checkbox"/> Banquet (Monday, March 26, 2012, 6:30 – 8:30 PM) \$40.00 per person	\$ _____
<input type="checkbox"/> Stilwell Retirement Breakfast (Tuesday, March 27, 2012, 6:30 – 8 AM) \$22.00 per person	\$ _____
<input type="checkbox"/> Legislative Luncheon (Tuesday, March 27, 2012, 12:15 – 1:15 PM) \$30.00 per person	\$ _____

Optional Meals – If not attending a Special Event

<input type="checkbox"/> Westin Galleria Breakfast (Monday, March 26, 2012, 6:30 – 8 AM) \$16.00 per person	\$ _____
<input type="checkbox"/> Westin Galleria Luncheon (Monday, March 26, 2012, 12:15 – 1:15 PM) \$18.00 per person	\$ _____
<input type="checkbox"/> Westin Galleria Breakfast (Tuesday, March 27, 2012, 6:30 – 8 AM) \$16.00 per person	\$ _____
<input type="checkbox"/> Westin Galleria Luncheon (Tuesday, March 27, 2012, 12:15 – 1:15 PM) \$18.00 per person	\$ _____

**REQUESTS FOR REFUNDS MUST BE RECEIVED IN THE TRTA OFFICE BY MARCH 1, 2012.
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 ▼ Expiration

▼ Signature _____

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 2012–2013 association year. The nominees will be elected by the TRTA House of Delegates during the upcoming TRTA Annual Convention in Houston. Other members of the committee include Betty Haynes (10), Helen McGill (16), Jack Teddlie (11), and Peggy Williams (12).

Maridell Fryar, For President

Currently serving as the 2011–2012 State First Vice-President. Served as the State First Vice-President (2010–2011), State Second Vice-President (2008–2010), State Secretary/Treasurer (2006–2008). 35 years in public education in Texas both as a teacher and a central office instructional administrator. Active member and officer in both state and national professional associations.

Francis Plemmons, For First Vice-President

Currently serving as the 2011–2012 State Secretary/Treasurer. Served as the State Secretary/Treasurer (2010–2011), Parliamentarian (2009–2010), State CVS Committee Chairman (2007–2009), District 7 President (2006–2008), and Rusk County RTA Treasurer (7 years).

Nancy Byler, For Second Vice-President

Currently serving as the 2011–2012 State District Presidents Council Chairman, State Health Care Committee Chairman, District 15 President and Technology Contact, Brown County RTA Immediate Past President and Technology Contact. Served as the State District Presidents Recorder (2010–2011), District 15 President (2010–2011), Brown County RTA President (2009–2010).

LaWynn Rogers, For Secretary/Treasurer

Currently serving as the 2011–2012 District Presidents Council Recorder, and District 10 President. Served as the District 10 President (2010–2011), Plano RTA President (2008–2010), District 10 First Vice-President (2007–2009), State Member Benefits and Informative and Protective Services Chairman (2005).

R. Don Vardeman, For Secretary/Treasurer

Currently serving as the 2011–2012 District 12 President. Served as the District Presidents Council Vice-Chairman (2010–2011), District 12 President (2010–2011), State Membership Research Committee (2009–2010), District 12 Parliamentarian (2009–2010), Waco-McLennan County RTA President (2007–2009).



Did you know that heart disease is the leading cause of death in America? In 2006, heart disease caused 26% of the deaths in the United States—more than one in every four.

Every year, approximately 785,000 Americans have a first heart attack, and of those who have already had a heart attack, 470,000 will have another. In 2010, heart disease cost the United States \$316.4 billion. This includes the cost of health care services, medications, and lost productivity. In addition, according to the Journal of the American Heart Association, by 2030 the cost to treat heart disease will triple.

With these statistics, chances are you or someone you know has been affected by heart disease. However, you can make a difference. There are things you can do to prevent most causes of heart disease and live a long healthy, happy life.

1. Learn About Heart Disease.

The most common type of heart disease is coronary artery disease (CAD), which can lead to heart attack. Other heart diseases include but are not limited to arrhythmias, congenital heart defects, high blood pressure, and stroke. Knowledge is power, so educate yourself about the many faces of heart disease, and take control of your heart health.

2. Prevent or Treat Heart Disease

News flash—exercise and eating nutritiously can help prevent chronic conditions. No, it's not a news flash, but it's easy to forget there are multiple benefits to regular exercise and a healthy diet besides losing weight. Many of the same recommendations and activities we perform for losing weight also help prevent heart disease and other chronic conditions. With all those benefits, why wouldn't we exercise regularly and eat better?

3. Be a Champion

There are many ways you can be a champion for others. Lead by example and make exercise and eating healthy a part of your everyday activities. Find healthy activities you can do together like cooking heart-healthy meals or playing tennis. Learn CPR.

For more information about ways to prevent and treat heart disease go to the American Heart Association web site at www.heart.org/HEARTORG/. Visit the Texercise web site for tips on eating healthy and exercise at www.Texercise.com.

OUTLOOK



LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

LEGACY CAMPAIGN UPDATED

TRTF has raised \$72,000 since November
15

TRTF READIES FOR CONVENTION

Luncheon details included.
16

DONATE TODAY!

Donation card on the back of *The VOICE*
16

TRTF LEGACY CAMPAIGN CONTINUES TO GROW

By Tim Lee, Acting State Coordinator

By now, many of you have received and responded to the Foundation's annual appeal letter about our newest venture, the Legacy Campaign. You may be curious about the goals of the campaign and what lies ahead for the Foundation.

As the Board of Trustees developed the Legacy Campaign, we realized there is a need for an education effort that engages both retired and active TRS members for the common goal of promoting the Texas public education legacy. We want our elected officials, the media, and the entire state to understand how the great legacy of public education impacts all Texans now and in the future.

Part of that legacy is the Teacher Retirement System of Texas. TRTF will create resources that focus on the economic and social impact the pension fund provides for all Texans. Another function of the campaign is to equip active school professionals with the knowledge and experience of our TRS retirees. Your voice in this effort is crucial. Finally, we want to promote building a strong public education legacy in Texas by identifying the programs that bring in the brightest education employees for our schools.

Thank you for your interest in this new initiative. Because of you, TRTF has raised \$72,000 in donations since November. We are just \$13,000 shy of reaching our original goal of \$85,000! If you have not yet had a chance to make a donation to the Texas Retired Teachers Foundation, please consider making a tax deductible gift using the form found on the back of *The VOICE*. Donations support our many charitable and educational programs ("A Helping Hand," student scholarships, and classroom assistance grants).

If you are interested in being involved directly with the TRTF Legacy Campaign or want to share your story, please contact us at info@trtf.org or 800.880.1650. Tell us how your role in public education has contributed to the great Texas public education legacy!

Thank you for your support. Your generosity is appreciated and makes a difference!

Did you know?

Help is available for TRS annuitants who need financial assistance to overcome critical emergencies. The Foundation considers various needs for assistance, including but not limited to medical, dental, and hospital bills, utility bills, home repair, and food. If you or someone you know could use a helping hand this season, please contact us at help@trtf.org or 1.800.880.1650 ext. 107. All applications are kept confidential.



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

TRTF READIES FOR THE 2012 TRTA CONVENTION

As you make your plans to attend the TRTA 59th Annual Convention in March, please consider attending our annual Foundation Luncheon. We would love to have you as our guest on March 26, 2012. Tickets are \$30, and may be purchased when you submit your convention pre-registration form (see page 12). This year, we have room for up to 400 guests!

Our menu includes delicious chicken primavera, classic caesar salad, chef's choice of vegetable, and carrot cake for dessert. The luncheon begins promptly at 12:15 p.m. in Woodway III.

During the luncheon, we will announce this year's student scholarship and classroom assistance grant recipients. TRTA Executive Director Tim Lee, who also serves as Acting Coordinator for TRTF, will be our guest speaker. Tim will provide us with an update on The Legacy Campaign, including the amount we have raised so far and how we will promote a positive image of public education retirees throughout the state of Texas.

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. 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 March 26 and your message will be announced.

For the second year in a row, the Foundation will be hosting a training session during the convention. We hope to see many local Foundation representatives and district liaisons there! Our session will be held Monday, March 26 from 4:00 p.m. to 5:00 p.m. in the Westchester Room on Level 3 of the Westin Galleria Hotel. Training topics include how to launch "A Helping Hand" in your local unit.



TRTF needs volunteers to assist in manning our exhibit booth on March 25 and 26. If you are interested, please contact Cindee at info@trtf.org by March 12.

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

SAVE TRTF A STAMP AND EMAIL ACKNOWLEDGEMENT TO:

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