

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

**6-7**

**TRTA Takes Over the Capitol**

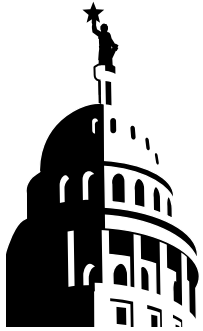
**8-9**

TEXAS RETIRED TEACHERS FOUNDATION

**OUTLOOK**

Classroom Assistance Grants, Student Scholarship Winners and "A Helping Hand"

**13-16**



# *The* VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

## 81st LEGISLATIVE SESSION: THE OFFICIAL TRTA WRAP-UP

**By Tim Lee**  
**Executive Director**

This session was perhaps the most challenging one I've experienced in my 14 years of working on behalf of public education retirees.

As the economy fell hard in the 4th quarter of 2008, many of us predicted the upcoming session would be tough. With the TRS pension trust fund losing billions of dollars in value and little hope of the economy turning around any time soon, the mood at the beginning of session was somber.

Still, the Texas Retired Teachers Association (TRTA) had an aggressive agenda. Our members were ready for a fight, and for 140 days straight, we never gave up. Our efforts were tenacious, and the results were better than many thought possible under the circumstances.

Now, it is time to reflect and plan ahead. TRTA will get little rest as we review this session's highs and lows and prepare for the next battle. This association will continue our relentless pursuit of the protection and improvement of your TRS pension benefit.

**CONTINUED ON NEXT PAGE**



*Former educators leave a lasting impression with state legislators at the Capitol 8-9*

# 81ST LEGISLATIVE SESSION: THE OFFICIAL TRTA WRAP-UP



STATE REPRESENTATIVE  
**Vicki Truitt**



HOUSE SPEAKER PRO TEM  
**Craig Eiland**



STATE REPRESENTATIVE  
**Jim Pitts**



STATE REPRESENTATIVE  
**Ruth J. McClendon**



STATE REPRESENTATIVE  
**John Otto**



STATE REPRESENTATIVE  
**Doug Miller**

## The Good

The bright spot is an overwhelmingly supportive House of Representatives. Though many State Representatives support TRTA, several champions deserve special recognition.

**State Representative Vicki Truitt (R-Keller):** This session was Rep. Truitt's second as Chairman of the Pensions, Investments and Financial Services Committee. She played a critical role last session in passing legislation that ensured the pension fund's actuarial soundness and allowed retirees to receive a first-ever 13th check.

More recently, this tenacious advocate's efforts not only saved key language that would allow retirees a \$500 supplemental payment, but it was also her bill (HB 3347) that resurrected the matter after a Senate bill died on the House floor just hours before the end of session. In fact, one Senator actually told TRTA the issue was dead and there was no way to revive it. Rep. Truitt and TRTA never gave up, though, and the language was

revived, passed, and ultimately signed by the Governor.

**House Speaker Pro Tempore Craig Eiland (D-Galveston):** Rep. Eiland's steady leadership has kept him in the forefront on TRS funding and retiree benefit issues. This session, he not only served as Speaker Pro Tempore and led a budget crusade to get state dollars needed to reestablish his district's most critically-needed services after Hurricane Ike, but he also offered an amendment at 2:40 a.m. after an all-night budget debate in the Texas House that proposed giving retirees a \$1,000 supplemental payment.

Another example of Rep. Eiland's dedication to TRTA: he came off the House floor to speak to the crowd on the South Lawn of the Texas Capitol at the TRTA Rally this April. Moments before he came out, he was presiding over the House in his role as Speaker Pro Tempore. When he heard that TRTA members had assembled outside for their rally, he relinquished the gavel and made

retirees his immediate priority.

**State Representative Jim Pitts (R-Waxahachie):** From the moment Rep. Jim Pitts was assigned as Chairman of the House Appropriations Committee, he was working to provide retirees with as large a benefit increase as possible. Rep. Eiland brought the amendment to the House floor to be added to the budget, but it was up to Chairman Pitts and his team (along with House Appropriations Subcommittee on Education Chairman Scott Hochberg, D-Houston) to find the dollars necessary to support the action.

In the final hours, when time was short and issues were stacking up, Chairman Pitts did not hesitate to help TRTA when he learned that critical authorization language had died, placing education retirees' supplemental payment in jeopardy. He tasked his staff to find a way to pass this needed authorization, and he huddled with the budget conferees to make certain public education retirees were not left in the cold.

## Key Legislative Bills: 2009 at a Glance

Bill Number	Summary	TRTA Position	Outcome
HB/SB 1 (Budget Bills)	General appropriations bills outlining overall state budget	Supported	Becomes law Sept. 1, 2009
SB 10 (Duncan)	Related to health care pilot program for state employees	Neutral with concern	Passed out of committee; no further action
HB 2144 (Gutierrez) HB 3998 (Hunter), HB 688 (Herrero), HB 648 (Davis), HB 4032 (McCall)	Related to TRS Board composition	Supported	Left pending in committee
HB 2656 (Miller)	Related to TRS Board composition	Supported	Passed unanimously in both chambers; Gov. vetoed
HB 3347 (Truitt)	Provides opportunity for supplemental check for TRS retirees	Supported	Passed unanimously in both chambers; sent to Attorney General for approval

## State Representative Ruth Jones McClendon (D–San Antonio):

Rep. McClendon played a critical role on the House Appropriations Committee, advocating for ways to help education retirees with a benefit increase. A veteran member of the House Pensions and Investments Committee from previous sessions, Rep. McClendon was one of the most vocal members on the House Appropriations Committee about increasing funding for the TRS pension trust fund and finding a way to provide a benefit increase.

Many who attended the TRTA Convention in El Paso last year remember her legislative advice: “When making phone calls, sending emails or writing letters, concentrate on the elected officials that actually represent you; they’re the only ones who care what you may have to say, and they know you can fire them if you don’t like what they do!”

## State Representative John Otto (R–Dayton):

For the past two sessions, Rep. Otto’s work on the House Appropriations Committee has focused on ways to ensure the fund’s actuarial soundness. In 2007, Rep. Otto urged that a one-time 13th check should be viewed as a stepping stone to a more significant, permanent raise for TRS retirees. He commended TRTA members for educating the legislature on the predicament of many retired public education employees whose pensions were not keeping up with inflation.

This past session, Rep. Otto served as a chief budget negotiator in his role as a House Appropriations Committee budget conferee. His work, like that of Rep. McClendon, helped block Senate negotiators from removing a benefit increase for public education retirees altogether.

**State Representative Doug Miller (R–New Braunfels):** This new legislative member came to Austin with a long legislative agenda. High on that priority list was adding another retiree to the TRS fund’s governing board.

The TRS Board of Trustees is the nine-member board responsible for managing the pension trust fund’s operations and

investments. The trustees are a mixture of private sector and active and retired TRS member appointees. Though there is an election process for the active educator and TRS retiree slots on the board, the Governor still has appointment power over each trustee.

TRTA has advocated for a direct member election process, as well as an additional TRS retiree on the board. Rep. Miller authored HB 2656 to achieve both goals.

The measure passed the House with a vote of 147–0 and went to the Senate. There, the direct election component was removed to appease the Governor, who expressed concerns over not being able to appoint the member. The Senate passed the bill unanimously.

The bill’s final passage came on May 29 with a vote of 140–0. On June 19, Governor Rick Perry vetoed it, denying retirees a stronger voice on their own pension trust fund board (see page 4).

In spite of the Governor’s veto, Rep. Miller deserves our gratitude for successfully pushing his bill further in the legislative process than any similar legislation has ever gone. TRTA hopes to work with Representative Miller in the future to revive the opportunity Governor Perry just killed.

It is important to note that Representative Miller’s bill was not the only one drafted to support this TRTA legislative initiative. We also thank the following State Representatives for drafting similar legislation: Yvonne Davis (D–Dallas), HB 648; Abel Herrero (D–Robstown), HB 688; Roland Gutierrez (D–San Antonio), HB 2144; Todd Hunter (R–Corpus Christi), HB 3998; and Brian McCall (R–Plano), HB 4032.

## The Bad

The not-so-bright spot this session was the Texas Senate. Unlike their counterparts in the House, the Senate seemed unwilling to make retirees a priority this session. This was most evident in the debate over the provision of a supplemental payment.

We are disappointed to report that there are few Senators we can recognize for their efforts on our behalf this session. One positive moment occurred in the

## By the Numbers

Here are some facts to share with fellow retirees when asking them to join or renew their membership and join you in educating our legislators about our issues:

**69,609** TRTA membership for 2009

**8** Number of years since last raise in TRS retiree benefits

**10,100** Number of people who actively signed up to receive the free email update “Inside Line” (does not include the number of people to whom it is forwarded from friends, and family members)

**45,000** Number of emails sent to legislators this spring through TRTA email campaigns

**7,287** Approximate number of phone calls made to legislators through TRTA’s “Call Your Legislator” hotline

**\$4 billion** Amount of state appropriation to TRS pension fund for the biennium

**\$12 billion** Projected pension payments to TRS retirees in the coming biennium

**600** Approximate number of TRTA members who attended TRTA Rally Day

**\$120 million** Appropriation made to TRS retirees (payment will either be made to retirees through a supplemental payment or to the TRS fund, pending Attorney General Ruling)

**\$104.9 billion** Total value of TRS fund on August 31, 2008

**\$70.6 billion** Total value of TRS fund on February 28, 2009

**32%** Percentage drop in assets in that 6-month span

**6.58%** State contribution to TRS Fund in previous biennium

**6.4%** Current state contribution to TRS fund

**100,000** Number of members TRTA is working to have by next session

Senate when we secured a funding commitment to the TRS–Care program, although in truth, the State is bound by statute to fund the program at a certain level, and we appreciated the Senate’s passage of HB 2656. Other than that, though, there is little encouragement as to the Senate’s commitment to public education retirees.

**CONTINUED ON NEXT PAGE**



### The Veto: Promises Made, Promises Broken

In October 2006, Governor Rick Perry responded to the Texas Retired Teachers Association's gubernatorial candidate questionnaire. To the right is a reprinted portion.

On March 6th, 2009, State Representative Doug Miller filed a bill that maintained the number of the TRS Board at nine members, modified its composition by taking one slot away from the State Board of Education (which holds two slots) and reserving it for an elected TRS retiree, and in doing so added stronger representation for the people who actually benefit from the fund.

This bill met every piece of criteria Governor Rick Perry stipulated, and yet it is abundantly clear that he alone is responsible for this bill being defeated.

The management of the fund and the preservation of the traditional defined benefit retirement plan for public education retirees is TRTA's core mission. For nearly 60 years, TRTA has worked for you in the Texas Legislative process. In all that time, we have never chronicled a more direct contradiction of statement vs. action as we did with Governor Perry's veto of HB 2656.

We are beyond disappointed in this veto. Be that as it may, TRTA will NOT let it deter us from reintroducing the issue again next session. ✪

**Q: As governor, would you support the addition of one or more retired members on the TRS Board of Trustees?**

**A: "...the board currently consists of nine members. I would like to keep the board at nine members but I am open to the idea of changing the make up of the board so that it would include greater retiree representation. I believe it is important that the individuals who stand to benefit from the wise management of the fund be well-represented."**

—Governor Rick Perry, October 2006



### 81ST LEGISLATIVE SESSION CONTINUED FROM PAGE 3

Perhaps most concerning is the failure of the Senate Finance Committee to embrace the use of general revenue dollars to provide retirees a supplemental payment, as proposed by Rep. Eiland. Not only did the Senate refuse to put any money toward a supplemental payment for TRS retirees in their budget proposal; they even argued against the very possibility of a benefit adjustment, citing alleged conflicts with the Texas Constitution and statutory restrictions. TRTA rallied hard in these discussions, but the Senate budget negotiators showed a clear unwillingness to commit to a supplemental payment. One example: a Senate-led reduction on the amount of the \$1,000 payment cap proposed by the House to a cap of \$500.

The fact that a supplemental payment to education retirees (and other public retirees) was held off by the Senate conferees until the very last minute made it difficult to develop an agreeable compromise and reasonably address the payment's legality.

The Senate conferees argued that using general revenue dollars to provide retirees with a supplemental payment

would be in violation of Articles III and XVI of the Texas Constitution. Article III deals with a restriction on the State to pay former employees additional compensation for work already rendered. Article XVI deals with the fund being managed with sound actuarial principles; the argument is that making a payment to retirees when the fund is not actuarially sound would be a breach.

After hours of negotiation and numerous delays in finding a final budget compromise, the solution was to appropriate enough money to pay eligible retirees a \$500 supplemental payment if the Texas Attorney General issues a legal opinion that it is permissible.

I cannot accurately convey our disappointment in the Texas Senate without mentioning a critical piece of information. Last session, the state contribution was set at 6.58 percent. The independent TRS actuary has since warned against the reduction of that percentage, and yet the Senate led budget discussions this session by lowering the contribution to 6.4 percent. In plain terms: in the worst economic downturn in the entire history of the TRS pension trust fund, during

a time when independent experts are issuing clear warnings against reducing the funded contribution level, the Senate proposed a reduced contribution to the TRS fund anyway.

Some might argue that TRTA is not seeing the big picture. They may contend the money that would be used to support TRS would instead provide retirees with a \$500 supplemental payment. This argument would have more credibility if the Senate had maintained its proposed level of support to the fund in the months leading up to the last-minute debate on the payment, or if they had proposed a long-term increase in funding to TRS. Unfortunately, neither of these scenarios occurred.

The issue is not dead, though. An official Texas Attorney General opinion will determine whether you will receive your supplemental payment, and TRTA's Board has hired the law firm Morgan Lewis to file a legal brief on the issue. After this article goes to press, regular updates will appear on the TRTA web site at [www.trta.org](http://www.trta.org) and through the "Inside Line." To have up-to-the-minute news delivered to your email, simply visit our web site and click on the "Inside Line" link to sign up.

## Looking Ahead

TRTA is always in planning mode for the next legislative session. Here are some of the top issues we expect to dominate the next session:

**Pension Funding**—There is no doubt that adequate funding of the TRS pension trust fund will be a primary TRTA issue. Legislators need to consider the following in the interim: The TRS Pension Fund has never suffered as large a drop in its actuarial condition as it did from August 31, 2008 to February 28, 2009. The legislature responded by reducing its funding to TRS. Even the independent TRS actuary advised the legislature to, at a minimum, maintain the funding level from the previous biennium, but it ignored this advice and reduced its commitment.

**Benefit Increase**—Next session will mark the 10-year anniversary of the last permanent increase in TRS retirement benefits. (An interesting tidbit: Legislators gave themselves a permanent retirement benefit increase in 2005.)

**Health Care Funding**—The fact that TRTA helped ensure adequate funding for TRS-Care this session is not a guarantee that the legislature will fully fund its portion of this critical program, even though it is required by law to fund it at a certain level.

**Health Care Delivery**—Legislation was proposed this year (without the counsel of TRTA or any other member-based constituent group) to test new theories and practices on some TRS-Care participants. TRTA successfully argued that the approach was not the best way to introduce a “paradigm shift,” as it was being called. The plan was shelved, but we are preparing for the issue to return next session.

**Pension Dollars for State Projects**—There has been much legislative discussion about how the TRS pension trust fund could invest in state toll roads. We have no issue with the TRS Board investing in infrastructure projects. We do, however, have a problem with the Texas Legislature and/or Governor forcing the TRS Board to invest in Texas infrastructure initiatives in order to

## You’ve Got Mail: Education Retirees Make Waves with Texas Legislature

### New Email, Phone Campaigns Reach Legislators in Record Numbers

This session TRTA used a new method to lobby lawmakers and convey our thoughts on issues affecting public education retirees. Through an innovative email service, members can now access their lawmakers in just a few clicks of a mouse.

This spring, TRTA’s state office sent out special issues of the “Inside Line” asking readers to click on links to pre-drafted letters explaining TRTA’s stance on specific topics and bills. The letters could be personalized to fit each member’s viewpoint, or simply sent “as is.” The system uses ZIP codes to determine which legislative district the sender resides in and offers the option of adding other legislators as needed. To keep our messaging clear about separate issues, on two occasions members were asked to place telephone calls to legislators serving their areas, as constituent calls are of utmost importance in the critical moments before a bill is passed or voted down.

The numbers are stunning. One four-day period in particular, more than 6,300 emails were sent in support of the much-needed supplemental payment for public education retirees. In all, TRTA members sent nearly 50,000 emails to the Texas Legislature and placed more than 7,000 phone calls about the issues that mean something to us.

TRTA members are active. We are loud. We work together as a team. As a result, every single Texas legislator received an email from a TRTA member this session. This is just one example of how amazing, energetic and dedicated the retired educators of Texas are, both as individuals and as an interconnected statewide team.

Although the 81st Legislative Session was a difficult one, we are positioning ourselves as a force to be reckoned with—a tactic that will prove handy as our battles continue. When we come together and join forces toward a common cause, anything is possible. ★



finance the projects they do not have the resources or the will to fund themselves through other means.

**Other Pitfalls**—TRTA is monitoring the political outcomes in many other states to track national trends in public pension plans. TRTA will stand vigilant against harmful actions such as pension-funding holidays, health care reductions and prescription drug plan changes. The TRTA Board and Legislative Committee will be ready if/when they appear in Texas.

## Concluding Comments

We pride ourselves on being the voice for all retired public education employees. This session was hard, and the results were less than inspiring. Imagine, though, what may have happened to current and future retirees without the efforts of TRTA

members. The outcomes would have been far less favorable in contrast.

Our most important resource we can draw upon to advance our legislative agenda is YOU. When times are tough and people question whether their membership in TRTA matters, YOU must remind your fellow retirees that we must stand together or fail. The global economic downturn is putting pressure on pension systems unlike any other time in our history. We must remain strong and active to protect what we have worked so hard to attain.

Your dedication to TRTA is appreciated more than you know. Your efforts have a profound impact on the Texas legislative process and thank you for your work this session. ★

# PRESIDENT'S LINE



2009–2010  
TRTA PRESIDENT  
**Dora Scott–Nichols**

Comments/Questions, contact Dora Scott–Nichols  
713.465.8912 • dorashn@comcast.net

**T**RTA has grown! The association has reached a membership of more than 69,400. What a great way to begin 2009. Thank you for joining the largest retired educators' organization in the United States. This is an impressive step forward. The legislature best take note.

In 1937, the Texas Legislature established the Teacher Retirement System, providing retirees with a defined benefit for the remainder of their lives. To watch over that system and ensure it acts in the best interests of those it serves, the Texas Retired Teachers Association (TRTA) was formed. TRTA exclusively represents public school retirees, a fact made even more relevant as today's economy draws dividing lines between groups competing for the same funds.

TRTA is the largest retired teachers organization in the nation. We proudly ended the 2008-2009 membership year closing in on nearly 70,000 members, moving us ever closer to Past President Jack Felts' goal of 100,000 members. THANK YOU for helping TRTA move closer to this goal. Please renew your membership today and take an active role in recruiting fellow retirees. The larger our group, the louder our voice!

We have had a remarkable year. The Executive Committee and Board of Directors, along with state office staff, work hard to uphold the association's standard of excellence in everything we do. Many thanks are due to these individuals for their support and dedication to our cause.

We are indeed grateful to District X President Tonna Duke, the District X members and, particularly, those who volunteered their time to make the 56th TRTA Annual Convention a rousing success in Dallas this spring. We thoroughly enjoyed the hotel, food, and entertainment, especially Suzie Humphries. A bombastic high school band set the tone right from the start of the opening ceremonies with a blast of energy that carried us throughout the week.

In addition to Convention, this spring brought us yet another grand event: TRTA Day at the Capitol. More than 600 TRTA members descended upon the Texas State Capitol in a remarkable display of solidarity, reminding legislators of our broad reach across the state. The event offered the perfect crescendo to the series of Capitol visits TRTA's legislative committee members had been making throughout the session. Many thanks are due to the committee, as well as the Austin RTA members who have consistently stepped up to the plate and represented us at the Capitol. We need to continue supporting our legislative team of Bill Barnes, Tim Lee and Barry Telford, all of whom have fought tirelessly for us throughout the thankless legislative process.

Thank you for your service to TRTA. Our legislators need to step up to the plate and assist retirees. There has been no substantial raise for us since 2001. By the time you read this, I certainly hope the Attorney General has ruled in favor of you receiving a supplemental payment. Regardless of the outcome, I want to thank you from the bottom of my heart for doing your part to make your voices heard.

Thank you again for all your support, your hard work, the miles you have walked and the books you have given to children who may have never had a book of their own. Your volunteer hours have enriched the Texas economy and the lives of those who depend on it. Please continue to recruit new members into our organization. If each of us just brings in one new member this year, our size will literally double, making us an even greater force to be reckoned with by the time the next legislative session arrives. Have a restful summer. Thank you for all you do.

PRESIDENT  
**Dora Scott–Nichols**

IMMEDIATE PAST PRESIDENT  
**Aubrey Cherry**

FIRST VP/MEMBERSHIP  
**Herbert Norris**

SECOND VP/PUBLIC RELATIONS  
**Maridell Fryar**

SECRETARY/TREASURER & FINANCE  
**Mary Jane Hamilton**

DIST. PRESIDENTS COUNCIL CHAIRMAN  
**Lynda Gottschalk**

DIST. PRESIDENTS COUNCIL VICE–CHAIRMAN  
**Kenneth Hanson**

DIST. PRESIDENTS COUNCIL RECORDER  
**Carolyn Vardeman**

LEGISLATIVE COORDINATOR  
**Bill Barnes**

ORGANIZATIONAL AFFAIRS  
**Martha Kallus**

HISTORIAN  
**Jesus Soto**

AUDIT COMMITTEE CHAIRMAN  
**Henry Lindley**

COMMUNITY VOLUNTEER SERVICE COMMITTEE CHAIRMAN  
**Helen McGill**

HEALTH CARE COMMITTEE CHAIRMAN  
**Dorothy Nash**

INFORMATIVE & PROTECTIVE SERVICES COMMITTEE CHAIRMAN  
**Judith Haney**

LEADERSHIP TRAINING COMMITTEE CHAIRMAN  
**Richard Roberts**

MEMBER BENEFITS COMMITTEE CHAIRMAN  
**Elva Garcia**

RETIREMENT EDUCATION COMMITTEE CHAIRMAN  
**Norma Hill**

## 2009–2010 TRTA Board of Directors



## MEMBERSHIP UPDATE



2009–2010  
TRTA FIRST VP/MEMBERSHIP CHAIRMAN  
**Herbert Norris**

We, the officers of the Texas Retired Teachers Association want to express our appreciation and gratitude to Tonna Duke; The Convention Committee and District X for being magnanimous convention hosts. We also thank TRTA members for your participation and support. Without you, the convention would not and could not have been successful. Because of the above success, we look forward to the next Convention with great anticipation. Over 90 percent of the convention comments were very positive, so again we say thanks!

We have been faced with many Legislative concerns as stated by Tim Lee in the “Inside Line,” including a 13th check consideration; a retired educator placed on the TRS Board, and an incentive-based health care system pilot program. We need to continually communicate with our respective Legislators regarding our desires and concerns.

Lastly, we must always remember that numbers matter. We are nearing 70,000 members, which is good, but even still we have not ascertained half of our possibility. I am requesting and encouraging each member to become a committee of one in recruiting new members. No one knows our friends (who are possible members) better than we do. We also need to put more emphasis on recruiting ancillary education retirees.

“The Harvest is Plenteous, but the Laborers are few.” Please join The Membership Committee in being a Laborer. Have a blessed, prosperous and happy summer!

## PUBLIC RELATIONS UPDATE



2009–2010  
TRTA SECOND VP/PUBLIC RELATIONS CHAIRMAN  
**Maridell Fryar**

WOW! As TRTA members, we have so much good news to get out! In March, we had our biggest state convention yet with excellent House of Delegates meetings, great breakout sessions, fantastic food and entertainment, and a general feeling as we left that we are so glad to be part of such a positive and active organization. **Did you submit a press release to your local paper?**

On April 22, we wore red and let the legislature know that we were there! I hope you were among the 600 plus TRTA members who were there, but even if you were not physically present, you were well represented! We may not have realized in this session all that we wanted, but we did sow positive seeds among our legislators and we got their attention. **Did you submit a press release to your local paper?**

We have had twenty Spring Leadership Training Conferences across the state to plan for the coming year. I personally had the privilege of attending Districts X, XIX, XIV, and XV and I was so impressed with the energy, the enthusiasm, and the intensity which I know was matched in all the other districts. **Did you submit a press release to your local paper?**

I hope that you are working actively to get out the word that we may be retired but we are not TIRED! Here is a nearly fool-proof way to get coverage in your local newspaper, no matter how large or small. WRITE A LETTER TO THE EDITOR. Most newspapers will publish a well-written letter. Craft yours to contain the information about the contributions of TRTA members across the state and then add your local data as well. Try these points:

- Over the past year alone, TRTA members donated more than 81 thousand books to Texas school children. (Then add your local numbers)
- Also in the past year, TRTA members took more than 27 billion—that’s BILLION—steps as part of the Walks-a-Million program in an effort to practice preventive health maintenance and do our part to reduce health care costs by aging actively and in good health. (Then add your local numbers)
- This past year, TRTA members contributed 4,994,140 hours in volunteer service—worth more than \$101 million dollars—to local Texas communities. (Then add your local numbers)
- Retired public educators do a lot of things. We give to charity. We share offerings and tithes with our places of worship. We spend our financial resources, time, and energy giving back to our communities.

Just think of the impact we could make if every one of our 70,000 members submitted a letter to the editor of their local newspaper this next week! You are our best public relations officer! Let’s get the word out!

## TRTA Takes Over the Capitol

Former educators leave a lasting impression with state legislators at the Capitol

More than 600 TRTA members climbed into buses and cars the morning of Wednesday, April 22 and converged on the Texas State Capitol to thank our legislators for keeping former educators' issues alive in the House and Senate. TRTA Day at the Capitol brought together former teachers, principals, coaches and other public education system personnel in a stunning visual display of bright red shirts and tote bags blanketing the Capitol grounds throughout the day. The reminder served to keep lawmakers aware of the sheer volume of Teacher Retirement System of Texas (TRS) retirees who vote.

"One in every 20 Texans is a part of TRS," said TRTA President Dora Scott-Nichols during her address on the South Steps of the Capitol that afternoon. "We comprise a huge portion of the state's population, and our spending power has been limited by the current economic climate. Our lawmakers must remember that retired public education employees haven't seen a cost-of-living raise since 2001, and yet we still continue to give back through mentoring, book drives and other acts of community service."

Inside, House Speaker Joe Straus, R-San Antonio, recognized TRTA members on the House floor and Senator Duncan followed suit in the Senate. Both commended TRTA members for their years of service to the state and post-retirement contributions to our communities. Afterward, legislators stopped by the Old Supreme Court Courtroom to meet retired educators from their districts and take photographs to send back home. Later in the day, legislative staffers joined TRTA members on the East Lawn for an old-fashioned ice cream social. At every event throughout the day, a special one-page handout was given to Capitol staff and elected officials to remind them of TRTA's legislative priorities.

To reiterate the value of our contributions to the state of Texas, TRTA presented legislators with a facsimile check for more than \$101 million to illustrate the amount of state revenue saved through our members' community service hours. We also highlighted the fact that we have delivered more than



TRTA members in the Senate and House Galleries

400,000 books into the hands of young Texans through our annual Children's Book Project and done our part to cut healthcare costs by participating in the Walks-A-Million program.

Since the event, Capitol insiders have shared privately that we could not have chosen a better time—or a better tactic—to reach out to Texas lawmakers and remind them that we are here, we vote, and we need their help. In the future, TRTA will look back and use April 22, 2009 as a blueprint for all legislative outreach events. ✦

## ENDORSED TRTA MEMBER BENEFITS

To learn more about these benefits, visit [www.trta.org](http://www.trta.org) or call 800.880.1650.



- 1) State Sen. Robert Duncan and District XVII Legislative Chairman Jeanette Moore
- 2) State Rep. Ralph Sheffield with District XII
- 3) District Presidents Council Chairman Lynda Gottschalk and President Dora Scott-Nichols
- 4) House of Representatives resolution 1108 written by State Rep. Vicki Truitt
- 5) State Rep. Solomon Ortiz, Jr. speaks with members
- 6) State Rep. Chris Turner with District XI
- 7) Austin's own Amy's Ice Cream provided special treats for the event
- 8) State Rep. Carol Kent with District X President Tonna Duke and member Greta Scobie
- 9) State Rep. Jim Pitts and State Legislative Chairman/Coordinator Bill Barnes
- 10) State Rep. Charlie Howard with District IV
- 11) State Rep. Patrick Rose with District XIII





1



2



3



4



5



6



7



8



9



10



11





## HEALTHCARE CORNER



### Free Blood Glucose Meters Available to TRTA Members

Did you know that by calling Caremark—one of the providers of the many benefits available to TRTA members—you can obtain a blood glucose meter at no charge?

When you order your no-charge meter, Caremark will also assist you in filling a test strip prescription at the same time. Additionally, by using Caremark's mail order service for your test strips, you may save money on your co-payment. You can speak to a Caremark representative by calling 800.588.4456.

Stay tuned to this section of the *Voice* in upcoming issues for more tips on how to maximize your TRTA membership and take advantage of its innumerable perks.

## WINNERS CIRCLE

**TRTA offers congratulations to Jack and Marjorie Felts for the prestigious E. L. Galyean Service Award.**



Marjorie Felts pictured with TRTA President Dora H. Scott-Nichols at the 56th Annual TRTA Convention.

#### **District Membership Achievement Awards:**

District XIII—highest percentage  
District X—highest number  
Honorable mentions: Districts I, VI, X, XII, and XVIII

#### **Golden Apple Awards:**

Burkburnett Area RTA, Cooke County RTSP, Grapevine–Colleyville ARSE, Northwest RSEA, and the Highland Lakes RTA



### Bowie County Memorial Honors Local Retired Educators

Western Bowie County Retired Teachers Association (RTA) president Juanell Cagle has realized a long-awaited dream of having a memorial for Bowie County school employees.

She and her husband, Roy, a former New Boston Independent School District superintendent, are excited that it has finally become a reality. The new monument with hundreds of names sits right in front of the Bowie County Courthouse in New Boston.

“The courtyard at the courthouse is the appropriate place to display such a memorial, and it’s an honor to have it in front of the building.”

Cagle said there are currently 386 names engraved along the wall running below the memorial. It became a reality when the Texarkana–Bowie County Retired School Employee Association and Western Bowie County RTA teamed up to recognize the efforts of teachers and staff who have touched the lives of children in public schools.

Cagle organized the dedication because the project is near and dear to her heart. She believes it is a wonderful way to honor those who have worked in the public schools in Bowie County.

Bowie County Judge James Carlow said the memorial is long past due.

“We already have several hundred names listed and we appreciate the work and dedication of those people who are no longer with us, who made a difference in the children they taught or influenced,” he said. “The courtyard at the courthouse is the appropriate place to display such a memorial, and it’s an honor to have it in front of the building.”

Pat Henry, Texarkana–Bowie County Retired School Employee Association president, offered the invocation and pledge of allegiance at the event.

“Public education came to Texas in 1840... [it] is dedicated to young people,” said Nick Blain, a past president with the Western Bowie County RTA.

He said the memorial not only recognizes teachers, but also the janitor, the cafeteria worker, and any person who touched the lives of children.

TEXAR Federal Credit Union sponsored the funding for the project.

*Edited reprint of article from Texarkana Gazette—originally published May 24, 2009*

# 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.)

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, 2009 through July 31, 2010). 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 2009–2010, 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. 12<sup>th</sup> St., Ste. 200 | Austin, TX 78701–1957

**EFFECTIVE GROUP POLICY DATE: AUGUST 1, 2009 – JULY 31, 2010**

**Limited Time Open Enrollment with No Waiting Periods!**

## TRTA Dental & Vision Program

During open enrollment you have the opportunity to join this dental plan with **no waiting periods** for covered services! This is exciting news for members who do not currently participate. **Open enrollment ends in August, so the time to act is now!**

Thousands of TRTA members currently enjoy group rates and benefits for their dental and vision coverage. Without dental insurance, the cost of care can get very expensive. In Texas, common procedures such as root canals, bridges, and crowns can cost more than \$900 each! However, with rich benefit levels and first day access to all covered services, this plan can help ease the financial burden of dental expenses.

### TRTA Dental Plan— Outstanding Features

- ❖ Freedom to use your own dentists or select a network dentist
- ❖ Dental Rewards—rollover part of your unused benefit to the next year
- ❖ High calendar year maximum of \$1,500
- ❖ No deductible for preventative services
- ❖ Rates & benefits guaranteed through July 2010

### TRTA Vision Plan— Outstanding Features

- ❖ Eye Exams covered in full every twelve months after minimal co-pay
- ❖ Lenses covered in full every twelve months after minimal co-pay
- ❖ Savings on progressive and transitional lenses
- ❖ Frames covered up to the allowance every twenty-four months
- ❖ No waiting periods

If you have questions or require additional materials, feel free to contact AMBA at **800.258.7041** or visit **www.trtabenefits.com**. This summer, members will be receiving information in the mail. If you have not yet received your packet, please call **800.258.7041** and reference the TRTA Dental & Vision program.





## TRTA'S 56th ANNUAL CONVENTION A SUCCESS!

Nearly 1,000 former educators come together to share ideas and continue learning

Teachers are known for imparting wisdom, but even in retirement, they still love to learn. Putting a new spin on the roles they filled throughout their careers, nearly 1,000 retired educators and guests came together March 29-31 for the Texas Retired Teachers Association (TRTA)'s 56th Annual Convention at the Westin Park Central to share ideas, strengthen advocacy efforts for fellow retirees and, of course, learn.

"In this challenging economic climate, retired educators are in a tough position," said TRTA President Dora Scott-Nichols. "We have to band together to keep our pension structure sound while we're out in the community, continuing to give something back even after we've retired from teaching in the traditional sense."

The convention, entitled "A Time for Action," offered members an opportunity to learn about TRTA's efforts to secure a long-overdue pension increase from the Legislature. Sessions this year also focused on topics such as community engagement, leadership training, healthy aging and investment management.

Attendees were treated to a keynote speaker, Suzie Humphreys, who shared a hilarious journey through the lessons her



PRESIDENT  
Dora Scott-Nichols



FIRST VICE-PRESIDENT  
Herbert Norris



SECOND VICE-PRESIDENT  
Maridell Fryar



SECRETARY/TREASURER  
Mary Jane Hamilton

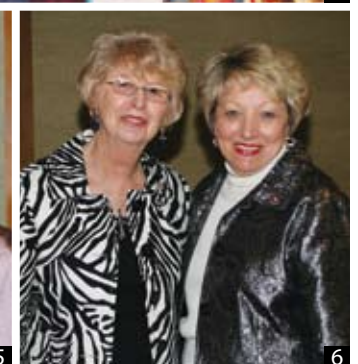
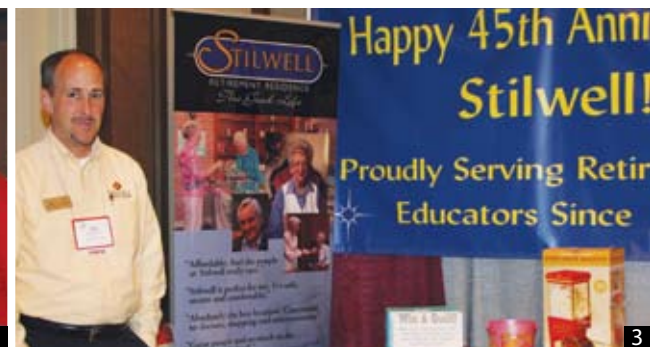
personal and professional experiences have brought her through the years. TRTA Executive Director Tim Lee gave live mid-session legislative updates throughout the week, and TRS executives gave an update on the health and future of the pension trust fund. Outside the main hall, exhibitors offered a range of free health screenings, helpful information and various goods for sale.

Also during the convention, TRTA held its annual House of Delegates meeting to update its bylaws which are available for download at [www.trta.org](http://www.trta.org) and elect officers for the upcoming year. **The elected TRTA 2009-2010 officers are President Dora Scott-Nichols, First Vice-President Herbert Norris, Second Vice-President Maridell Fryar, Secretary/Treasurer Mary Jane Hamilton and continuing as Past President Aubrey Cherry.**

At a special evening reception, retired Waco-area educator Marjorie Felts and her late husband, Jack, were honored for their many years of service to the education community with the E.L. Galyean Service Award, the association's highest honor.

TRTA's 57th annual convention will take place in Arlington on April 13-15, 2010. ★

- 1) President Dora Scott-Nichols and Executive Director Emeritus Michael Lehr
- 2) Past President Aubrey Cherry presents certificates to Dist. XIII (Ruth Spears) for the highest membership percentage and Dist. X (Tonna Duke) for the highest membership number
- 3) Stilwell Retirement Residence Coordinator and Exhibitor Bob Herndon
- 4) Dr. Kathryn McClellan, Secretary/Treasurer Mary Jane Hamilton and Jo Etta Penn enjoy the TRTF Luncheon
- 5) Second Vice-President Herbert Norris, Dist. VII President Dorothy Wasunyk and friends
- 6) Members at the Officers Reception



# OUTLOOK

## LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

### CLASSROOM ASSISTANCE GRANTS

TRTF awarded four \$500 grants to public school teachers throughout the state.

13-14

### STUDENT SCHOLARSHIP WINNERS

Ten recipients were selected to receive a \$500 scholarship.

14

### A HELPING HAND

The program provides public education retirees with financial assistance for a one-time special need or hardship.

15

## CLASSROOM ASSISTANCE GRANTS

The Texas Retired Teachers Foundation (TRTF) recently announced its 2009-10 Classroom Assistance Grant winners. This year, TRTF awarded four \$500 grants to public school teachers throughout the state.

Prior to Hurricane Ike, Sara McCurry taught fourth grade at Burnet Elementary school in Galveston. Unfortunately, the school was flooded during the storm and is still closed. Sara and 15 of her 20 students relocated to Parker Elementary. "The school district did a wonderful job of getting the schools back open as soon as possible," says Sara. "Of course, this also meant moving to another school with virtually nothing."

During the storm, Ms. McCurry lost all of the listening stations that she used to improve students' reading fluency and comprehension. Although she received a brand new listening station, her class has been unable to use it due to lack of resources. She is purchasing new books and CDs in a variety of reading levels with the \$500 grant she received from TRTF. Sara plans to share her new reading resources with her fellow teachers, allowing many students to benefit from the grant.

Throughout this experience, Sara says she has witnessed resilience from her students. Some of them lost everything, including school supplies. "Although this year is much different than where we started, I truly believe that we have had just as much success as any other year," she says. "The students are happy and looking forward to starting 5th grade and middle school next year."

Sara is thankful for the support she has received from fellow teachers, volunteers and anonymous donors from around the state. Sara says it took everyone working together to bring a sense of normalcy back to the classroom. The grant provided by TRTF will be instrumental in bringing many students a familiarity of life before the storm. TRTF wishes Sara and all the students in Galveston continued success.

CONTINUED ON 14

## \$500 GRANTS

Norma Krueger Elementary | Marion Genevieve Moore—created a science cart for elementary students

Wheatley Elementary | Lubbock  
Kristi Curtis—purchased *Scholastic News* and *National Geographic Young Explorer* for first graders

Brabham Middle School | Willis  
Denise Clay—created a high interest, multi-reading level classroom library



Burnet Elementary | Galveston (above)  
Sara McCurry—purchased book sets and CDs for new listening stations



# STUDENT SCHOLARSHIP WINNERS

TRTF recently announced its 2009–10 Student Scholarship winners. Ten recipients, all of whom will be attending a Texas college or university in the fall, were selected to receive a \$500 scholarship. The full list of recipients is available on the TRTF web site.

TRTF had the opportunity to do special presentations for some of the scholarship recipients. Kelsey Duncan was honored at the local Birdville Area Retired School Personnel (ARSP) meeting on May 8 by Foundation Specialist Cindee Sharp and local foundation liaison Jack Teddlie. Kelsey attends Lubbock Christian University in Lubbock, Texas. She travelled from Brownfield to attend the meeting with her aunt Jolene, sister Alex and cousin Kelley. Kelsey's great aunt, Jolene Armstrong, is a member of the Birdville ARSP.

Kelsey is a single mom who attends school full-time, works and volunteers at Ballanger Head Start and Dunbar Middle School. She is the president of Lubbock Christian University's Kappa Delta Pi, an international education honor society. She still managed amid her various activities to earn a 4.0 at LCU in the fall.

The Birdville ARSP members generously treated Kelsey and her relatives to lunch after her scholarship conferral. Kelsey's name was drawn for a door prize of a lovely glass dish and savory snacks as well.

## Since the program's inception, TRTF has awarded \$7500 in scholarships funds.

Kelsey is majoring in early childhood education, and as she states in her winning scholarship essay, her goal is to "become a teacher and to pass on to young children what (she) was blessed to receive as a student in the Texas public school system."

TRTF extends a big thank you to all of the members of the Birdville ARSP, and especially local unit president Lois Sieverling for her hospitality and support.

During the Ft. Worth Retired School Employees Association local unit meeting on April 15, Foundation specialist Cindee Sharp presented a certificate to Phillip Gonzales. Phillip is a senior at Richland Hills High school and will be attending Austin College in Sherman in the fall. He is related to TRTA member Marcia Polsgrove of Ft. Worth, and is the son of former teacher, principal and coach Albert Gonzales.

Landon Sparks, a DeKalb High School senior, was presented with a certificate by TRTF trustee Carolyn Lance at the New Boston local unit meeting on April 27. He is related to TRTA members Eddie and Cordell Elkins of Simms, Texas. They are members of the Western Bowie County Retired Teachers Association. Landon plans to major in science education when he attends the University of Texas in the fall.

**To read more about the scholarship recipients, please visit the TRTF web site at [www.trtf.org/apply](http://www.trtf.org/apply).**

## GRANTS CONTINUED FROM 13



**Denise Clay and ESL Coordinator Kary Thigpen**

Classroom assistance grants were also awarded to Genevieve Moore, Kristi Curtis, and Denise Clay (above).

Genevieve Moore, a first grade teacher at Norma Krueger Elementary in Marion, will use her grant to purchase supplies and equipment for a science cart. The science cart will contain items such as goggles, petri dishes and thermometers. Purchasing the equipment, which will be shared among pre-kindergarteners through second graders, will allow "each class (to) have small cooperative groups working to conduct investigations," says Ms. Moore. Ultimately, Ms. Moore hopes these materials will help her students engage in hands-on activities that will improve their TAKS scores.

Kristi Curtis teaches first grade at Wheatley Elementary School in Lubbock. In order to integrate reading strategies into social studies and science instruction, Ms. Curtis will purchase copies of *Scholastic News* and *National Geographic Young Explorer* for every first grade student on campus. In class, Kristi will use the publications to highlight high frequency words and content vocabulary and practice fluency through repeated readings. She also hopes the magazines will serve as a springboard for writing.

Denise Clay teaches at Brabham Middle School in Willis, Texas. She has approximately 120 students in her sixth, seventh, and eighth grade ESL classes. Her \$500 grant will create a multi-reading level classroom library designed for struggling readers. The books will help her students master the English language, improve their independent reading levels and encourage them to read on their own. Denise will be able to purchase nearly 100 books for her classroom library with her grant from TRTF.

**Kelsey Duncan**







**"A Helping Hand" provides public education retirees with charitable assistance for a one-time special need or short-term hardship. Recipients include anyone who is receiving or is eligible to receive an annuity from the Teacher Retirement System of Texas. The goal is to provide financial help for Texas education retirees in critical need.**

## A HELPING HAND

During the 56th Annual TRTA Convention, foundation trustees voted in their board meeting to designate \$10,000 to launch the foundation's newest and most anticipated philanthropic program, "A Helping Hand." The program provides public education retirees with financial assistance for a one-time special need or hardship.

TRTF will use the initial \$10,000 to launch a pilot version of "A Helping Hand" in four districts in Fall 2009. At present, TRTF is finalizing guidelines for the program and selecting those four districts.

TRTF is immensely grateful for the support we have received from all

members of TRTA. In these trying economic times, it can be difficult to include donations to your favorite charities in your budget. It is in these times, however, that your generosity is most needed. If every district donated \$2500 to the foundation, TRTF could raise \$50,000.

This would enable the foundation to provide greater monetary scholarships and classroom assistance grants, as well as launch its new "A Helping Hand" program statewide by the end of the year!

Your district or local unit may also consider including a donation to the foundation in its yearly budget. If every local unit donated just \$100, TRTF would raise \$25,700!

Donations may be designated specifically for any of the foundation's programs. The funds you send go towards the causes you care about the most: helping your fellow educators, past, present and future.

**As Tom Pritchard stated during the TRTF Luncheon, this is YOUR foundation. The good that is being accomplished by TRTF is a direct result of YOUR generosity!**

To learn more about the foundation's programs, request a TRTF brochure or make a donation, please send an email to [help@trtf.org](mailto:help@trtf.org) or call Cindee Sharp at 800.880.1650. A donation card is also available on the back page of the *Voice*.

## Special Donation Made to the Foundation in Memory of Jack C. Felts

During the 56th Annual TRTA Convention banquet, District XII presented a generous gift to the Foundation. The gift was made in memory of Jack Felts, who along with his wife Majorie Felts received the E. L. Galyean Service Award. Anna Brodie, a member of District XII and a Foundation representative, presented the gift to Tom Pritchard, TRTF Board President (right).

The donation was made possible by the members of District XII, who gathered nearly \$2500 for the Foundation. The members of District XII have voted to designate half of their donation for the Student Scholarship program and half for "A Helping Hand."

**This tremendous gift will allow TRTF to provide scholarships for college students, and aid to retired school personnel for a one-time special need or hardship.**





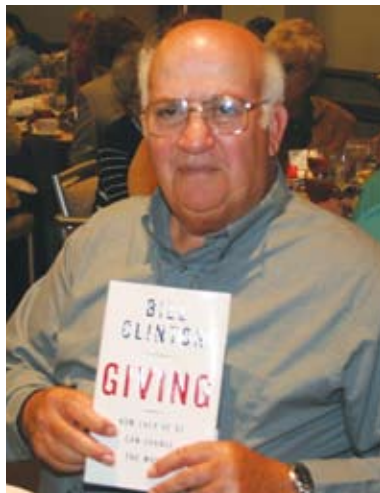
The **VOICE**

Send address changes to:  
Texas Retired Teachers Association  
313 E. 12<sup>th</sup> St., Ste. 200 • Austin, TX 78701-1957  
800.880.1650 • [www.trta.org](http://www.trta.org)

TRTF UPDATES ITS WEB SITE FREQUENTLY. VISIT US @  
**WWW.TRTF.ORG**  
YOU CAN EVEN MAKE DONATIONS ONLINE!

## LUNCHEON UPDATE

TRTF Trustees and Foundation Specialist Cindee Sharp attended the 56th Annual TRTA Convention in Dallas March 29-31. The Foundation Luncheon was held at the Westin Park Central in the Covingtons Ballroom on March 30 and was attended by over 200 guests!



TRTF Trustee La Vonne Rogers announced this year's scholarship and grant recipients. Luncheon guest David Saenz received a signed copy of the book *Giving* by Bill Clinton as part of a surprise drawing.

**Book drawing winner  
David Saenz**

TEXAS RETIRED TEACHERS FOUNDATION

# OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

Reba Kirby, a lifetime member of TRTA, was honored in a special presentation by TRTF Trustee Michael Lehr. Her years of dedication were further recognized as guests offered donations in her honor in a rousing display of generosity at the end of the luncheon. Many other memorials and honorariums were made from the luncheon floor, as guests came to the front of the ballroom to honor their loved ones and friends with donations to the foundation.



**Reba Kirby and  
Executive Director  
Emeritus/TRTF Trustee  
Michael Lehr**

Texas Retired Teachers Foundation

## *Donation Card*

### I WANT TO HELP!

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

\_\_\_\_\_

*Please accept my donation of:*

☐ \$25   ☐ \$50   ☐ \$100   ☐ \$ \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

Donations are tax deductible. Enclose a check and completed donation card and send to:  
Texas Retired Teachers Foundation • 313 E. 12th St., Ste. 250 • Austin, TX 78701