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The VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

81st TEXAS LEGISLATIVE SESSION UNDERWAY

By **Tim Lee**
Executive Director

The 81st Texas Legislative Session is now operating at full speed. As this issue of *The Voice* is being produced, the Texas Senate is discussing their version of the state budget and the House is aligning their committee assignments. In the midst of it all, one message seems to be surfacing above the regular legislative noise: Education retirees should not expect much this legislative session. TRTA has a plan that will hopefully reverse that thinking and make this legislative session as productive as it can and should be for all TRS retirees.

Why is the Legislature so glum?

Paraphrasing a popular line from a recent blockbuster movie, the Texas Legislature wants someone to “show them the money.” The first look at the Texas proposed expenditures versus projected revenues shows a state budget shortfall of about \$5.5 billion.

Though there is much debate about how to use the Texas rainy-day fund, or what state budget relief may be realized with the ever evolving federal bail-out program, the fact is that available dollars in the Texas budget are tighter than in the past few sessions.

Compounding problems for public education retirees is the weakened state of the TRS pension trust fund. Most TRTA members already know the bad news—pension fund investment earnings are down by 27 percent, the fund’s value is dropping from a high of \$112 billion to a projected low right now of about \$80 billion, and it is still too early to guess exactly what TRS will say after their February 28th pension fund valuation, but the news is not likely to be good.

Still, TRS continues to send out benefit payments to nearly 300,000 public education retirees and, unlike many people whose privatized pension investments may have dropped so significantly in value that they have altered their retirement plans, there is not even a hint of active retirees not being able to retire when they are able. This is the true value of a “defined benefit” pension plan. Legislators can learn a valuable lesson as to why TRTA and its members work so hard to protect their pension trust fund.

There is significant pain being felt all over the country and in Texas as low consumer confidence and unstable markets make projecting the state budget one of the most untenable jobs in the legislature. The overall mood in the Texas Legislature is that of hesitancy and concern over the current economic climate.

What do we know so far about TRS funding?

Unfortunately, TRS has had a bumpy start for its budgeting process. The total budget request presented in SB 1 (the Senate budget bill) for TRS is \$4 billion. Many TRTA members will remember that, last session, the state appropriation was raised to 6.58 percent. This was the first percentage increase in state funding to TRS in 12 years.

This session, the base-line budget recommendation for TRS from the Legislative Budget Board (or LBB) is 6.4 percent. In overall dollars, the total baseline budget proposal to TRS from the state, active employee contributions, and employer contributions tops \$4 billion. Though the baseline budget proposal for the state is 6.4 percent, the

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PRESIDENT'S LINE



2008–2009
TRTA PRESIDENT
Dora H. Scott-Nichols

TRTA HAS grown! The Association has reached a membership of 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.

Change has reached Texas along with the rest of the country. Fortunately, in spite of the economic downturn TRTA members will continue to receive their annuity checks. Texas' retirement plan is a defined benefit plan established in 1937 in the State Constitution. The plan is based on a formula—not a defined contribution plan (e.g., 401k). This was stated in the November 2008 "TRS News." Retirees of TRS will receive their annuities.

The 81st Legislature began on January 13, 2009. Please utilize the information outlined in the Advocate section of the previous "The Voice," which outlines TRTA's priorities. By now, I hope you have contacted your legislators and will continue to do so throughout this session. Also, please remind them that education retirees have not received an increase since 2001. The 13th check was a help but with a 27 % reduction in buying power, retirees are distressed—especially those early and ancillary retirees.

The Board of Directors and Standing Committees have met. Plans are under way for the TRTA 56th Annual Convention which will be held in Dallas at the Westin Park Central Hotel. Please plan to attend as a delegate or guest. District X President Tonna Duke and TRTA Secretary/Treasurer Mary Jane Hamilton along with other District X members are working diligently to make this a memorable event. Bylaw amendments and other information are published in this issue of "The Voice" (see pages 6–11). Our EXCELLENT keynote speaker at the convention will be Susie Humphreys. Furthermore, an update will be given by the TRTA Legislative team.

Remember, the deadline for 2008–2009 membership is February 28, 2009. All new members in excess of the total count for 2007–2008 will provide each local unit with a \$7.00 rebate per new member. This rebate will aid the local unit budget. In addition, be sure to turn in your Steps, Community Hours and Books for Children.

Make use of the TRTA phone number to the Texas Capitol operator to contact your Legislators: 888.674.3788, Monday through Friday—8 a.m. to 5 p.m.

Thanks to all of you again for your hard work in making TRTA the largest education retirees' organization in the United States. Let's continue to work together to make TRTA the Voice for Retirees. EVERY MEMBER COUNTS!!!

 **Comments/Questions, contact Dora H. Scott-Nichols**
713.465.8912 • dorashn@comcast.net

Texas Retired Teachers Foundation

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I WANT TO HELP!

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

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The Texas Retired Teachers Foundation is a non-profit, perpetual corporation whose formation was authorized by the Texas Retired Teachers Association. Final approval by state and federal regulating agencies occurred on March 22, 2000. The Foundation's purpose is to support educational, charitable, and other causes in support of Texas public education in general, and specific areas which affect retired public school and higher education personnel. Contributions in the form of bequests, legacies and other types of donations are deductible for federal estate and gift tax under the provisions of the IRS code 501(c)(3).

MEMBERSHIP UPDATE



2008–2009
TRTA FIRST VP/MEMBERSHIP CHAIRMAN
Herbert Norris

A collaborative meeting of the Membership, Finance, Retirement Education, PR and OAC Committees was held January 5–6, 2009. In attendance were the members of the Membership Committee, the chairmen of the PR, Finance and OAC Committees, Executive Director Tim Lee, and TRTA office staff Amy Lynch and Carolyn Rickard.

TRTA has grown to encompass 69,400+ members. This reflects the association's largest membership total ever. For this we are appreciative; however, we still

have a long way to go. We've been stressing the "Each One Bring One" concept, and 2nd Vice-President Maridell Fryar has suggested that, if even half of our members committed themselves to bring in one new recruit this year, we will reach our goal of 100,000 members by the year 2010.

Other current and future challenges discussed were:

- recruiting and retaining ancillary education employees (e.g., nurses, bus drivers, cafeteria staff, etc.)
- outreach to ancillary personnel occurring at the local level (e.g., retired nurses reaching out to active school nurses in their communities)
- making local meeting programs engaging, meaningful and interesting to raise interest among potential new members
- catching and holding the attention of active educators to make TRTA a household name, synonymous with their thoughts on retirement (similar to AARP)
- making active educators aware of TRTA's existence and purpose (state office will research connective opportunities with current teachers so that membership becomes an obvious eventuality)
- language barriers (translation of materials into Spanish)
- potential dues increase consideration
- aligning our mailing list(s) with TRS's lists in an effort to purge the names of deceased members (avoid sending materials at sensitive/inappropriate times)
- encouraging local participation in the maintenance of local TRTA web sites
- developing methods to generate revenue in addition to membership dues
- developing a strategy to include additional levels of membership

PUBLIC RELATIONS UPDATE

2008–2009
TRTA SECOND VP/PUBLIC RELATIONS CHAIRMAN
Maridell Fryar

SPOTLIGHT ON SUCCESS!

Are you using every available means to spotlight the successes of your TRTA District and Local Units? Have you considered "thinking outside the box" for programs, projects, and publicity? Your TRTA Public Relations Committee has put together a packet of ideas along with a group of presenters to help you do just that! So plan to come to the Second Vice-President/Public Relations breakout sessions at the convention to get the scoop on what other units are doing around the state to turn the spotlight in their communities on the wonderful work of retired educators.



LEADERSHIP TRAINING SESSIONS

MONDAY MARCH 30, 2009

PRESIDENT	Salon A 2:30–3:30 p.m.	4–5 p.m.
FIRST VP/MEMBERSHIP	Canyon B 2:30–3:30 p.m.	4–5 p.m.
SECOND VP/PR	Marsalis 2:30–3:30 p.m.	4–5 p.m.
SECRETARY	Benbrook 2:30–3:30 p.m.	4–5 p.m.
DISTRICT TREASURER	Meredith B 2:30–3:30 p.m.	
LOCAL UNIT TREASURER	DeGolyer 2:30–3:30 p.m.	4–5 p.m.
LEGISLATIVE	Salon B 2:30–3:30 p.m.	4–5 p.m.
CVS	Grapevine A 2:30–3:30 p.m.	4–5 p.m.
HEALTH CARE	Texhoma A 2:30–3:30 p.m.	4–5 p.m.
I&PS	Grapevine B 2:30–3:30 p.m.	4–5 p.m.
MEMBER BENEFITS	Texhoma B 2:30–3:30 p.m.	4–5 p.m.
RETIREMENT EDUCATION	Meredith A 2:30–3:30 p.m.	4–5 p.m.

08-09 TRTA BOARD

PRESIDENT	Dora H. 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	Mary Reeves
DIST. PRESIDENTS COUNCIL RECORDER	Pat Toland
LEGISLATIVE COORDINATOR	Bill Barnes
ORGANIZATIONAL AFFAIRS	Martha Kallus
HISTORIAN	Jesus Soto
STANDING COMMITTEE CHAIRMEN	
AUDIT	Henry Lindley
COMMUNITY VOLUNTEER SERVICE	Francis Plemmons
HEALTH CARE & PROTECTIVE SERVICES	Dorothy Nash, Judith Haney
MEMBER BENEFITS	Elva Garcia
RETIREMENT EDUCATION	Norma Hill

proposed appropriation is \$236 million more for the coming biennium.

The Texas Legislative Budget Board (LBB) testified that this increased dollar amount is attributable to statewide active employee payroll growth upon which the state appropriation is based.

There's no question that though the amount of state dollars going to the fund is increasing, the lowered percentage of contribution is reduced in this proposed budget. How will this impact the fund's actuarial soundness? The answer will not be known until later in the session after TRS has an opportunity to do their February 28, 2009 valuation (a snapshot of the fund's value and investment performance, required in legislative years to help decision makers with TRS budget issues). Mr. Ronnie Jung, TRS Executive Director, said the February 28 valuation may show that a state contribution of 9 to 10 percent may be needed to make the fund sound in the coming biennium.

The news is bad, but it could be worse. Consider that TRS provides benefits to around 300,000 annuitants. When you hear that TRS has "lost" about 27 percent on its fund value, also remember that this number includes \$2.5 billion of the \$6.5 billion in annual payroll for retirees (state

share totals about \$2 billion, the active share totals about \$2 billion, and TRS fund makes up the remaining \$2.5 billion for an annual total of \$6.5 billion in retiree payments). Continuing this thought, the major U.S. markets are down around 40 percent or more. TRS is down around 27 percent, and that includes more than a third of the cost of making retirement payroll. This is truly astounding and shows how effectively the TRS Board of Trustees and their leadership and investment team are managing your pension trust fund.

Of course, when the markets are on the upswing, TRS investment earnings pay their portion of the annuitant payroll. But in down years, that money comes from the corpus and, as one state senator said, "that's eating our seed-corn." TRS is as ready as everyone else for this recession to end and for the markets to help recover these losses.

TRS decisions under scrutiny

The TRS trustees and staff have done a great job trying to diversify the fund and to protect the assets in this terrible market. This work, though, does come at a price. TRS contends that, as it becomes even more sophisticated in managing one of the world's largest pension funds, its overall

staff is too small and that state salary limitations impede on its ability to attract the best and brightest employees.

This thought process turned into action last summer as TRS started expanding their investment team and adopted a plan to hire about 65 new full-time employees to manage the fund. In addition to the new hires, TRS also adopted an incentive pay plan that would reward their employees good performance and exceeding their earnings benchmarks. TRS argued that, if all the bonus money was paid (about \$10.1 million if every achievement was reached), the reward to the fund overall would be an additional \$2.1 billion earnings on the investments.

This seemed like a reasonable way to attract, retain and reward good employees in what was a highly competitive and extremely demanding field, but the world has changed, and with a crashing thud. Rewarding fund managers with bonus money has taken on an almost scandalous connotation, and TRS is not immune to the public and political outcry that is so loud in this troubled economy.

TRS has paid out some investment bonuses over the past 18 months and, according to their policies on this issue, still owes some bonus money to several

TRTA Bill Tracker

SB 450	Sen. Patrick	Prohibits TRS investments in certain private business entities doing business in Iran
HB 84	Rep. Martinez (Mando)	Creates a permanent COLA for TRS indexed to the annual Social Security increase
HB 274	Rep. Callegari	Allows TRS to provide supplemental payments to annuitants when the fund is actuarially sound and is able to do so without impacting the overall funding condition (statutes that govern Employee Retirement System has this authority)
HB 440	Rep. Edwards	Provides a 13th Check for TRS annuitants (cap of \$2400)
HB 476	Rep. Allen	Provides a 10% permanent increase in retiree annuities
HB 648	Rep. Davis (Yvonne)	Makes changes to allow for direct election of TRS education and retiree trustees
HB 686	Rep. Herrero	Provides TRS annuitants a permanent cost of living adjustment based on the CPI-W and would reflect the same percentage increase provided to Social Security recipients
HB 687	Rep. Herrero	Creates a health benefits fund so that the interest earned on state contributions to the fund could be used to offset the future costs of health care premiums
HB 688	Rep. Herrero	Allows the retiree trustee on the TRS Board to be directly elected and eliminate the need for gubernatorial involvement
HB 689	Rep. Herreo	Mandates that the minimum state contribution to the TRS fund will be no less than 7% and no more than 10% of the aggregate active teacher payroll
HB 1094	Rep. Vo	Eliminates State Board of Elections appointees to TRS Board of Trustees and changes these positions to elected trustees from the TRS membership
HB 1191	Rep. Flores	Allows a retiree up to 90 days after retirement to enroll in TRS-Care
HB 1259	Rep. Kolkhorst	Provides that the Teacher Retirement System of Texas is not authorized to hire fiduciary counsel and that the attorney general shall provide outside legal counsel to TRS including in matters of fiduciary responsibilities

This list is current as of 02-10-2009. The TRTA bill tracker is updated daily with new information about these and any other legislation introduced since 02-10-2009. Please visit www.trta.org for the latest updates.

employees but is holding those payments for another 12 months (this is due to a provision that TRS essentially defers the bonus when the fund has a negative return). TRS testified that, to date, \$622,000 has been paid to various investment employees and that another \$450,000 is “owed” to employees. TRS testified that the bonus money that has been paid or deferred was earned in the previous year. Be that as it may, TRS is still under considerable pressure to review these incentive pay policies.

What is being said about benefits for retirees?

With all this talk about investment loss, incentive pay, and state budget woes, who is saying anything about helping retired public education employees who have not had a permanent pension increase in more than eight years?!

A number of bills have been filed relating to benefit increases for education retirees. A list of those that have been filed as of February 12, 2009 are on the previous page.

TRTA is supporting ANY legislative effort that advances a retiree benefit increase this session. TRTA’s ultimate goal in any legislative session is the passage of a permanent and ongoing cost of living increase bill that would provide a regular annual increase to retiree benefits. This concept is a challenge when economic times are strong, so it should not come as a surprise to any TRTA member that passing a bill such as this during this session will be next to impossible.

TRTA is also very interested in ensuring retirees receive an ad hoc raise that would restore the loss of buying power all TRS annuitants have suffered due to not receiving regular permanent increases for over eight years. This, too, is a challenge this session, but TRTA is more confident that this idea has more of a chance than a permanent cost of living adjustment (or “COLA”) bill given the political environment.

TRTA thinks the legislature should, at a minimum, provide an additional retirement check for TRS retirees like they did last session. The “13th check” provides a lump-sum payment to retirees as a temporary relief for those struggling under financial distress. This may be

TRTA’s Steps to Legislative Success

- ▶ **If you have email, you need the TRTA *Inside Line*.** The fastest and most effective way TRTA communicates with its members is through an email service called the *Inside Line*. This service, available to anyone – TRTA member or not – delivers the most up-to-date legislative information you can get on TRTA issues, and most importantly is free! Log on to the TRTA web site at www.trta.org and click the icon that says “*Inside Line*.” Receiving the *Inside Line* ensures you are getting the information you need about your pension benefits.
- ▶ **Know your legislators and make sure they know you!** Want to know what influences legislators more than anything else? It’s their constituents. Nothing rivals the power to vote someone out of office, and legislators know they need to perform to keep their jobs. Please call or email your legislator at least one time this session and tell them you are a member of the Texas Retired Teachers Association and their constituent and that you need them to take action for you this session.
- ▶ **Send TRTA your story.** As a way to ensure your voice is being heard, TRTA wants you to send your personal story, comments, and concerns about the TRTA issues this session. It is our goal to use your words more than ours, after all TRTA is YOUR VOICE in the TEXAS LEGISLATURE. Please send these comments to tim@trta.org or to amy@trta.org and we will work them into our public testimony during this legislative session!
- ▶ **Call, Call, Call!** Many times during a legislative session, TRTA will be aware of a bill going before a committee or a vote taking place on a critical measure. TRTA will send an alert to members through the *Inside Line* and will ask you to call your legislator. We provide a toll-free number for your use: 888.674.3788. This will automatically connect you to the Texas Capitol switchboard and you can ask to speak directly with someone in your legislator’s office. It’s fast, simple, and FREE!
- ▶ **Email your legislators.** Email is another tool you can use through TRTA to get the message delivered to legislators. During the session, TRTA will send targeted email advocacy campaigns to *Inside Line* subscribers. These email advocacy campaigns generate lots of legislative interest on the issues important to you and to TRTA. Be ready for these alerts all session long as this free email tool is implemented even more.

the most likely concept to advance this legislative session, but even something like this will require a huge effort on TRTA’s part, and the will of the Texas Legislature to ensure it gets done.

What is the TRTA Plan?

Make no mistake, whatever may happen for TRS retirees this session will be greatly influenced by the work and pressure exerted by TRTA members. There is a reason we all work so hard to increase the total membership (now touching the 70,000 member mark!!). The fact is, TRTA’s power is in the membership’s willingness to engage in the legislative process. How can TRTA members do this?

The bottom line is this: The more TRTA

members communicate with their own legislators, the more likely the legislature as a whole will feel pressured to help get things done for public education retirees. The process does not need to be mean, hateful, or overly aggressive, but it does need to be factual, consistent, visible, and loud. These are difficult times. We are facing steep odds this session and TRTA is working as hard as ever to ensure that we receive help for our members this session.

Now is the time to be engaged in the process. TRTA needs you, and we appreciate your effort and your membership as we all work together to make great things happen this session.

TRTA BYLAWS REFERRED AMENDMENT

During the 55th annual convention, an amendment to ARTICLE VI. Section 2 first sentence was proposed to amend by striking “An annual” and inserting “A biennial”; second sentence, amend by striking “The Board of Directors shall determine the time and place of the convention” and inserting “The TRTA convention shall be held in odd years in Austin, Texas, or within a 40 mile radius of Austin during the month that the Texas Legislature is in session with the proviso that all amendments shall go into effect July 1, 2011.”

To keep the bylaws consistent, collateral amendments, ARTICLE VII. Section 2.1 and 2.2, first and second sentences, ARTICLE VIII. Section 1.1, third sentence, amend by striking “one” and inserting “two”; ARTICLE VIII. Section 2, ARTICLE IX. Section 2.1, & Section 3, ARTICLE XIII. Section 2, ARTICLE XV. Section 2.3, amend by striking “annual” and inserting “biennial.”

RATIONALE:

TRTA MANAGEMENT The TRTA can more effectively negotiate hotel rooms, food and beverage costs, room costs, catering costs, audio visual expenses, etc. If the venue is constant, keeping the venue in the Austin area allow TRTA to negotiate long term contracts with hotel and convention center facility providers, thus resulting in overall savings to the membership as well as the association.

TRTA LOCAL UNITS Local TRTA leaders are able to plan and budget more effectively for the convention and the expense of sending delegates by having a biennial convention. This will allow units to have a period of time to recover financially from the costs of sending delegates to conventions that have been held all over the state.

GREATER PARTICIPATION The Austin area location provides incentive for TRTA members to participate in the convention as many major Texas roadways make it easy to get to the Austin area as well as traveling to the Austin airport.

LEGISLATIVE FOCUS Meeting in Austin every other year, coinciding with the Texas legislative schedule allows members to participate in the legislative process by planning their own personal side visits to the capitol, having the TRTA host a legislative event, or by conducting a large scale advocacy day for the convention.

FACILITIES Several Austin hotels and certainly the Austin Convention Center is ideally equipped to handle the TRTA convention. Several convention centers and hotels are being planned in areas surrounding Austin.

PREPARATION Meeting in the Austin area allows the TRTA staff and volunteers to meet regularly with facility personnel to better coordinate and place activities.

An amendment “to refer the proposed bylaws amendment to a geographically diverse ad hoc committee which will formulate all appropriate bylaws amendments and submit them to the OAC for consideration at the 2009 TRTA convention, and will formulate a transition plan.

RATIONALE The formation of the ad hoc committee could study issues that may not have been considered. These issues include but are not limited to the following: (1) What meeting will occur in the even numbered or non-convention years? (2) How can other units around the state support the Austin area volunteers so they don't burn out after a couple of conventions? (3) Would districts be required to elect officers for two-year terms in alignment with TRTA bylaws? (4) How might this change affect other TRTA bylaws? The committee could find all bylaws changes in a timely manner before the next convention of that an approval requires a two-thirds vote rather than a nine-tenth vote. Motion adopted.

The ad hoc committee reports the following collateral amendments:

Article VII. Section 2.1. first sentence – strike “one” and insert “two”

Article VII. Section 2.1. second sentence – strike in its entirety

Article VII. Section 2.2. first & second sentences – strike “one” and insert “two.”

Article VIII. Section 1. fourth sentence – strike “one” and insert “two.”

Article VIII. Section 2. first sentence – strike “annual.”

Article IX. Section 2.1 & Section 3. first sentence – strike “annual.”

Article XI. Section 3.- strike “ensuing year” and insert “two years” and strike “annual.”

Article XIII. Section 2. - strike “annual.”

Article XV. Section 1. first sentence – add “of the even year.”

Article XV. Section 1.4 – add “of the odd year.”

Article XV. Section 2.3. – strike “annual.”

The ad hoc committee reports the following transition plan.

1. The Board of Directors shall determine the time and location of meetings that will occur in the even numbered or non-convention years.
2. Training during the even years can be provided through area meetings, by use of technology and the internet, by mail, or any other method determine by the board.
3. Rotate responsibility for the convention to other districts so that District XIII does not have responsibility for every convention.
4. The election and terms of district officers are the decision of each district. Districts may choose to align with the state elections.
5. All TRTA bylaws and board policies would need to be changed to reflect biennial meetings.
6. TRTA officers' terms would be for a one time one year or three years to allow for transitioning to a biennial convention.
7. The biennial convention would begin with the convention of 2013.

TRTA BYLAWS EDITORIAL CHANGES

OAC proposes the following editorial changes to clarify the bylaws WITHOUT changing the content of the bylaws. These changes will also make terminology and form consist throughout the bylaws. The entire article or section is printed to enable the reviewer to easily locate the editorial changes. Word(s) lined through are struck and word(s) inserted are in bold and underlined.

ARTICLE IV: MEMBERS

Section 1

Any retired school personnel or spouse who is an annuitant of or who is or who shall be eligible to receive annuity benefits from a teacher retirement system may become a member of TRTA upon payment of dues, either through a Local Unit or directly to TRTA. ~~Beginning July 1, 2004, any new member of a Local Unit, defined as a member who was not a member of that Local Unit in the previous year, shall also belong to the state organization.~~

Section 2

Any person who is interested in education and desires to promote the objectives of TRTA may become an Associate Member of TRTA upon payment of TRTA dues **either through a Local Unit or directly to TRTA**. Associate Members shall have all the rights and privileges of membership except the right to vote and to hold office in TRTA.

Section 3. Beginning July 1, 2004, any new member of a Local Unit, defined as a member who was not a member of that Local Unit in the previous year, shall also belong to ~~the state organization~~ **TRTA**.

Section 3 **4.** Annual dues of both Active Members and Associate Members shall be twenty-five dollars (\$25.00), two dollars (\$2.00) of which shall be rebated to the respective TRTA District.

ARTICLE V: DIVISIONS

Section 1 – Districts

The Districts, as established by TRTA, shall follow and implement TRTA policies, programs, and procedures and shall provide leadership to and communication with the Local Units of TRTA. Districts shall meet the following requirements:

1. ~~Hold~~ **Conduct** a Fall Convention; ~~and~~
- ~~1.2. Conduct~~ a Spring Leadership Training Conference to train newly elected Local Unit officers and appointed committee chairmen;
- ~~2. 3. Require a~~ **shall** be Active Members of a Local Unit within that District and of TRTA.
- ~~3.4. Have a minimum of five (5) officers: pPresident, fFirst vVice–pPresident, sSecond vVice–pPresident, sSecretary, and tTreasurer; and~~
- ~~4. 5. Have a minimum of eight (8) committees: mMembership, pPublic rRelations, lLegislative, bBylaws, cCommunity vVolunteer sService, rRetirement eEducation, iInformative and pProtective sServices, and hHealth cCare.~~ The First Vice-President shall be chairman of the Membership Committee and the Second Vice-President shall be chairman of the Public Relations Committee.

Section 2 – Local Units

All Local Units shall follow and assist with TRTA **B**bylaws, policies, programs, and procedures. Each Local Unit meeting the following requirements established by the Board of Directors shall be issued a TRTA certificate of affiliation:

1. Adoption of bylaws not in conflict with the **B**bylaws of TRTA;
2. A minimum of six (6) regular meetings per year;
3. All elected officers and committee chairmen be members of the Local Unit and TRTA;
4. A minimum of five (5) officers: **p**President, **f**First **v**Vice–**p**President, **s**Second **v**Vice–**p**President, **s**Secretary and **t**Treasurer; and,
5. A minimum of seven (7) committees: **m**Membership, **l**Legislative, **p**Public **r**Relations, **c**Community **v**Volunteer **s**Service, **r**Retirement **e**Education, **i**Informative and **p**Protective **s**Services, and **h**Health **c**Care.

ARTICLE VI: HOUSE OF DELEGATES

Section 2

The Board of Directors shall determine the time and place of the Convention. An annual TRTA Convention shall meet for the purpose of:

- 1.** Electing officers,
- 2.** Receiving reports,
- 3.** Amending **B**bylaws, ~~and~~
- 4.** Conducting such other business as may properly come before the House of Delegates,
- 5.** Providing training for presenters at District training meetings, and
- 6.** Providing opportunities for social interaction with other TRTA members present.

ARTICLE VII: OFFICERS OF THE ORGANIZATION

Section 2

TRTA Officers shall serve terms of office as follows:

1. The officers elected by the House of Delegates shall serve one-year terms, coinciding with the fiscal year. Officers shall be eligible for reelection to one (1) subsequent consecutive term.

2. The appointed officers shall serve one-year terms and, except for the Legislative Coordinator, shall be eligible for reappointment not to exceed four (4) consecutive years. The Legislative Coordinator shall not be limited as to the number of consecutive one-year terms to which he or she may be appointed.
3. ~~The terms of office for r~~Representatives from the District Presidents Council shall ~~coincide with their terms of office as officers of that Council.~~ **be current District Presidents.**

Section 3

Representatives from the District Presidents Council:

~~The District Presidents Council shall fill a vacancy occurring among the representatives from the Council serving as statewide officers.~~
Vacancies in the representatives from the District Presidents Council shall be filled by current District Presidents.

ARTICLE IX: BOARD OF DIRECTORS

Section 2

The TRTA Board of Directors shall:

1. Conduct TRTA business between annual Conventions, subject to the ~~B~~bylaws and instructions of the House of Delegates;
2. Maintain a blanket fidelity bond covering all employees and the Secretary/Treasurer;
3. Employ an Executive Director and determine his or her compensation and period of contract;
4. At its discretion, appoint an Executive Director Emeritus; and,
5. Conduct such other duties as outlined elsewhere in these ~~B~~bylaws.

Section 3

The Board of Directors shall meet at the beginning and at the close of the annual TRTA Convention, with a minimum of four (4) additional regular meetings per year, and at any other times specified in the ~~B~~bylaws. The Board of Directors, in addition to the regular meetings, may meet via teleconference as directed by the President and the Executive Director.

ARTICLE XI: COMMITTEES

Section 4

With the exception of the Legislative Committee, all standing committees shall be composed of a minimum of five (5) members including the chairman and ensure that at least 50 percent of the committee members are continuing committee members. Members may serve a maximum of four (4) years. The Legislative Committee shall be composed of a minimum of twenty (20) members and ensure that at least 75 percent of the committee members are continuing committee members. Members may serve a maximum term of eight (8) years. ~~Proviso: All current committee members shall be permitted to exceed the maximum years in order to establish a smooth rotation of members.~~

ARTICLE XIII: PARLIAMENTARY AUTHORITY

Section 1

The latest edition of *Robert's Rules of Order Newly Revised* shall be the parliamentary authority governing all matters of procedure not otherwise provided in these ~~B~~bylaws or in the special rules of order that TRTA may adopt.

ARTICLE XV: AMENDMENT OF BYLAWS

Section 1

Proposals for **Proposed** amendments of the TRTA Bylaws to be considered by the Organizational Affairs Committee ~~must~~ **shall** be made through a Local Unit or a TRTA District and must be submitted to the TRTA office by November 1.

Section 2

The Organizational Affairs Committee will shall:

- ~~1. The Organizational Affairs committee will b~~ **Be** authorized to submit proposed bylaw amendments.
2. Study the proposal and determine its potential impact on the operation of TRTA;
3. Edit and format the proposal with the approval of the author of the composition;
4. Recommend approval, disapproval, or continued study; and
5. Forward the proposal and the Committee's recommendation to the Board of Directors by January 1.

~~Section 2~~ **3.** The Board of Directors ~~will~~ **shall** submit to the House of Delegates all proposals to amend the TRTA ~~B~~bylaws as recommended or not recommended including the Organizational Affairs Committee's specific recommendations and the rationale of both the Board of Directors and the Organizational Affairs Committee. The TRTA House of Delegates may amend the TRTA ~~B~~bylaws during the Convention by:

1. A two-thirds vote, provided that the members have been given notice of the proposed amendment through a TRTA publication or through other written communication at least 30 days prior to the TRTA Convention date; or
2. A nine-tenths vote if members have not been given such notice.

TRTA BYLAWS EDITORIAL CHANGES

3. All amendments shall become effective July 1 following the annual state convention unless otherwise stated as a proviso with the proposed amendment.

Revised by House of Delegates – April 13, 2001

Amended – April 16, 2002

Amended – April 25, 2003

Amended – April 20, 2004

Amended – March 22, 2005

Amended – April 4, 2006

Amended – April 16, 2007

Amended by House of Delegates – April 17, 2008

TRTA BYLAWS 2009 PROPOSED AMENDMENTS

AMENDMENT #1

ARTICLE IV. Members. Section 1 first sentence. Amend by striking “spouse who is an annuitant of or who is or who shall be eligible to receive annuity benefits from a teacher retirement system may become a” and insert “beneficiary who is an annuitant from a teacher retirement system may become a regular”. Collateral amendments : Article IV. Section 3 and Article V. Section 1.2.

If adopted would read:

Any retired school personnel or beneficiary who is an annuitant from a teacher retirement system may become a member of TRTA upon payment of dues, either through a Local Unit or directly to TRTA.

Maker’s Rationale: In order to become a member of TRTA, the individual must receive a teacher annuity and the word “beneficiary” identifies this individual.

Maker of Amendment: Organizational Affairs Committee

Individual to Contact: Martha Kallus

Board of Directors Recommends: Adoption

Board of Directors Rationale: It is not necessary to restrict membership only to spouses of a teacher retirement system but extend it to anyone who is a beneficiary of a teacher retirement system.

AMENDMENT #1A

ARTICLE IV. Members. Section 1 first sentence. Amend by striking “or spouse who is an annuitant of or who is or who shall be eligible to receive annuity benefits from a teacher retirement system may become a” and insert “who is an annuitant and receives benefits from the Teacher Retirement System of Texas may become an Active”.

If adopted would read:

Any retired school personnel who is an annuitant and receives benefits from the Teacher Retirement System of Texas may become an Active member of TRTA upon payment of dues, either through a Local Unit or directly to TRTA.

Maker’s Rationale: Active members are not defined in our current bylaws and need to be. Since we work to protect the TRS, our active members should be annuitants of that system. If retired school personnel want to be members who are annuitants of other retirement systems, they are welcomed as Associate members.

Maker of Amendment: Brown County RTA

Individual to Contact: Betty Beyer

OAC Recommends: Disapproval

OAC Rationale: This amendment restricts regular membership to teachers who retired in Texas. Texas is considered a retirement state and restricting a retired teacher from another state serves no purpose especially when his/her capabilities are deserving of a state office position. It is also in conflict with Article II. Section 2.2. Objectives that uses the term “all” retired school personnel.

Board of Directors Recommends: Disapproval

Board of Directors Rationale: Many capable retirees from other states often relocate to Texas and if we restrict membership only to Texas retirees, we would also be restricting leadership and member contributions. This would also be true of retirees from higher education and private school retirement systems.

TRTA BYLAWS 2009 PROPOSED AMENDMENTS

AMENDMENT #2

ARTICLE IV. Members Sections 2 & 3. Amend by striking "M" from the word member and inserting "m."

If adopted would read:

Section 2. Any person who is interested in education and desires to promote the objectives of TRTA may become an Associate member of TRTA upon payment of TRTA dues. Associate members shall have all the rights and privileges of membership except the right to vote and to hold office in TRTA.

Section 3. Annual dues of both Active members and Associate members shall be twenty-five dollars (\$25), two dollars (\$2) of which shall be rebated to the respective TRTA Districts.

Maker's Rationale:

Maker of Amendment: Brown County RTA

Individual to Contact: Betty Beyer

OAC Recommends: Disapproval

OAC Rationale: Active Member and Associate Member are considered a two word unit, and both words should begin with a capital letter. It is similar to a first name and a last name.

Board of Directors Recommends: Disapproval

Board of Directors Rationale: Concurs with OAC rationale.

AMENDMENT #3

ARTICLE IV. Members Section 2 second sentence. Amend by inserting "/or" after "and" and before "to hold."

If adopted would read:

Associate Members shall have all the rights and privileges of membership except the right to vote and /or to hold office in TRTA.

Maker of Amendment: Brown County RTA

Individual to Contact: Betty Beyer

OAC Recommends: Disapproval

OAC Rationale: The sentence as it appears in the bylaws makes an exception to both the right to vote and the right to hold office.

Board of Directors Recommends: Disapproval

Board of Directors Rationale: The insertion of "and/" before "or" is confusing, vague and ambiguous. It seems to allow Associate Members to either hold office or to vote while prohibiting them from doing either.

AMENDMENT #4

ARTICLE VIII. Nominations, Elections, and Installation Section 1.1. Sentence 6. Amend by striking "a plurality shall elect" and inserting "the four nominees with the most number of votes shall be elected."

If adopted would read:

If there are more than four (4) nominees, then the four nominees with the most number of votes shall be elected.

Maker's Rationale: *Robert's Rules of Order Newly Revised* states that a plurality that is not a majority never elects. The current bylaws state that the nominees require a majority vote to be elected. Adoption of this amendment will make the current practice of electing members to the Nominating Committee who have the most number of votes in accordance with the bylaws.

Maker of Amendment: OAC

Individual to Contact: Martha Kallus

OAC Recommends: Adoption

OAC Rationale: OAC agrees with the rationale of the Maker.

Board of Directors Recommends: Adoption

Board of Directors Rationale: Allows TRTA to follow *Robert's Rules of Order Newly Revised* more closely.

TRTA BYLAWS 2009 PROPOSED AMENDMENTS

AMENDMENT #5

Article VIII. Nominations, Elections, and Installation. Section 1.1 Amend by inserting a new sentence 7. "If there is a tie in the fourth position, the tellers' committee shall draw by lot to break the tie and determine the fourth position" and current sentence 7 will become sentence 8 in the paragraph.

If adopted would read:

If there is a tie in the fourth position, the tellers' committee shall draw by lot to break the tie and determine the fourth position.

Maker's Rationale: Puts a procedure in place for breaking a tie.

Maker of Amendment: OAC

Individual to Contact: Martha Kallus

OAC Recommends: Adoption

OAC Rationale: OAC agrees with the Maker's rationale.

Board of Directors Recommends: Adoption

Board of Directors Rationale: This puts a clear and effective procedure in place for breaking a tie vote. It is also an accepted practice by most other nonprofit organizations.

Nominating Committee Report

The TRTA Nominating Committee, Chaired by Immediate Past President Aubrey Cherry, District XIX, reports that the following members have filed, and are eligible candidates, for TRTA office for the 2009-2010 association year. Next year's officers will be elected by the TRTA House of Delegates during the upcoming 56th TRTA Annual Convention to be held in Dallas. Other members of the Nominating Committee are Judith Haney (District IV), Norma Hill (District X), Mauro Serrano (District XI), and Pat Toland (District IV).

Dora H. Scott-Nichols, For President

Serving as TRTA President (2008-2009) • Served as TRTA First Vice-President (2006-2008) • Served as a Texas Retired Teachers Foundation Trustee • Served as TRTA Second Vice-President (2004-2006) • Served as TRTA Secretary/Treasurer (2002-2004) • Served as District IV Chair of the Health Care & Bylaw Committees • Served as Houston ART President

Herbert Norris, For First Vice-President

Serving as TRTA First Vice-President (2008-2009) • Served as TRTA Second Vice-President (2006-2008) • Served as TRTA Secretary/Treasurer (2004-2006) • Served as TRTA I&PS Committee Chairman (2002-2004) • Served as District VII Second Vice-President • Served as Smith County RTA Treasurer

Maridell Fryar, For Second Vice-President

Serving as TRTA Second Vice-President (2008-2009) • Served as TRTA Secretary/Treasurer (2006-2008) • Served as Midland ARSP President (2006-2008) • Served as member of the District XVIII Pre-Retirement Committee • Served as member of the District XVIII Legislative Committee • Served as Midland ARSP Newsletter Chairman & Secretary

Linda Abshier, For Secretary/Treasurer

Serving as Lampasas County RTA Secretary (2008-2009) • Served as Lampasas County RTA Secretary (2005-2008)

Mary Jane Hamilton, For Secretary/Treasurer

Serving as TRTA Secretary/Treasurer (2008-2009) • Serving as Convention Site Selection Chairman (2008-2009) • Served as District X President (2006-2008) • Served as TRTA District Presidents Council Recorder (2006-2008) • Served as member of the TRTA CVS Committee (2007-2008) • Served as Allen REA President (2003-2005) • Served as Allen REA Second Vice-President (2001-2003)

Dora H. Scott-Nichols
For President



Herbert Norris
For First Vice-President



Maridell Fryar
For Second Vice-President



Linda Abshier
For Secretary/Treasurer

No Photo
Provided

Mary Jane Hamilton
For Secretary/Treasurer





Payable to: Austin Cotton
 10400 Manchaca Road • Austin, TX 78748
 800.487.8337 • Fax 512.442.4610
 email: austincotton@austincotton.com

TRTA Polo Shirt Order Form

Deadline: March 9, 2009

Please complete form and mail payment to Austin Cotton.
 Shirts will be available at the convention for pick up on
 March 29–31, 2009 on the 2nd Floor (Registration Area). No refunds or exchanges.

Bill To:

Name _____

Address _____

City _____

State _____ Zip _____ Phone _____

Payment Options: Check • Money Order • Credit Card

Please charge my: Visa MasterCard

_____-_____-_____-_____

Signature _____

**Not attending the convention, add \$6.00 for shipping for up to 3 shirts.
 Shirts will be mailed on April 14, 2009. Questions, please call Austin Cotton.*

Men's and Women's Shirt Prices: (Includes tax)
S–XL \$25.00 • 2XL \$27.00 • 3XL, 4XL \$ 27.00

_____ **Women's** \$ _____

S M L XL 2XL

Colors: Red Royal Blue Black

_____ **Men's** \$ _____

S M L XL 2XL 3XL 4XL

Colors: Red Royal Blue Black

**Add \$6.00 for shipping if not attending convention.* \$ _____

TOTAL \$ _____

TRTA Polo Shirts

Order Yours TODAY

Available in Royal Blue, Red & Black



TRTA Welcomes Marketing & Communications Specialist

Amy Lynch will direct TRTA's outreach activities to raise our visibility among various audiences and establish the association as a nationally-recognized brand.

Prior to joining TRTA, Amy served as communications director for the Florida Department of Elder Affairs, reporting to the Governor's press office and overseeing the agency's public outreach initiatives. She spent six years as the public relations manager of Florida's Long-Term Care Ombudsman Program, developing comprehensive communications campaigns to recruit volunteers and raise awareness of the program's services for elders.

Amy began her career at the country's largest independent public relations agency; there, she assisted with international PR campaigns for clients in the travel and tourism industry, working with media around the globe. Her experience then expanded at an integrated marketing communications firm, where she spearheaded campaigns for corporations, state agencies, associations and other non-profit organizations.

One of the most memorable moments in Amy's career thus far has been volunteering with the NASA public affairs team during its Return to Flight pre-launch activities in 2005. There, she was given an opportunity to field media calls at the Kennedy Space Center press office alongside the space program's veteran spokespeople, including Hugh Harris, a gentleman commonly referred to as "the voice of NASA." She has also served as a regional Emmy judge for the Academy of Television Arts and Sciences in the public service announcement category, and her campaigns have won several industry awards for excellence in public relations, including four National Mature Media Awards for her work with senior populations.

Born into a family of public school teachers, Amy grew up in Jacksonville, Florida and earned a bachelor's degree in English from Florida State University.



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Keynote Speaker
Suzie Humphreys

Suzie is one of the most compelling speakers on the platform today, taking her message from corporations to conventions, hospitals to classrooms; she is at home with people of all ages and all walks of life. The reason men and women relate to her is because she tells the truth about her failures and her arguments with her husband and how she wrestles with her hilarious but "painful" relationship with her 95 year old mother. These stories prove her point that, regardless of what the situation or the problem in the job or the relationship, it is NOT the "problem that's the problem" it is "MY THINKING ABOUT THE PROBLEM." It is "close to the bone stuff" It is everybody's "stuff!!"



She has criss-crossed the country to over 2,000 groups, every kind imaginable. She has stayed in fancy hotels, and "mom and pop" motels. She has spoken to small town Chambers of Commerce and big city founding fathers and her message of truth and plain spoken values rings in the hearts of all communities who are not just trying to "survive" the times but flourish in them. She believes that you can do anything you want to do and enjoy getting there "heartbreak and all!"

When she leaves the stage there remains the unmistakable warmth of having been touched, and the unshakable affirmation that whether ordinary of extraordinary, through good times or bad, caught in mid-frailty or new accomplishment "Life really is the greatest thing ever!"

Convention Schedule

Sunday, March 29, 2009

10 a.m. – 6 p.m. Delegate Certification/Registration
 Noon – 6 p.m. Exhibits
 10:30 a.m.–TBD Executive Comm. Meeting, Salon C
 1 – 2 p.m. LTC Meeting, Salon B
 2 – 3:30 p.m. Dist. Presidents Meeting, Salon A
 3:30 – 5 p.m. Board of Directors Meeting, Salon C
 7 – 8:30 p.m. TRTF Board Meeting, Salon B

Monday, March 30, 2009

8 a.m. – 5 p.m. Exhibits
 8 a.m. – 5 p.m. Delegate Certification/Registration
 8:30 – 10 a.m. Opening Ceremonies
 10:30 – 11:30 a.m. Legislative Session
 11:30 a.m. – 1 p.m. TRTF Luncheon
 1:15 – 2:15 p.m. District Caucuses
 2:30 – 6:15 p.m. Breakout Sessions
 7:30 – 9 p.m. Banquet

Tuesday, March 31, 2009

8 a.m. – Noon Exhibits
 8 – 9 a.m. Delegate Certification/Registration
 9 a.m. – 11:30 a.m. 1st House of Delegates
 11:30 a.m. – 1 p.m. Stilwell Retirement Luncheon
 1:30 p.m. – TBD 2nd House of Delegates
 7 – 8:30 p.m. Officer's Reception

TRTA 56th Annual Convention
 Westin Park Central, Dallas • March 29–31, 2009

HOTEL RESERVATION FORM

Personal Information

NAME (LAST/FIRST) _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____

SHARING ROOM (LAST/FIRST) _____ NUMBER OF PERSONS _____

- ☉ Mail completed form with payment to: Westin Park Central 12720 Merit Dr. • Dallas, TX 75251
- ☉ All reservations received after March 15, 2009 are subject to availability as well as a higher daily rate.
- ☉ Check in at 3 p.m. • Check out at Noon
- ☉ Phone 888.627.7032 • Fax 972.851.2033

Accommodations

Single \$129 Double \$129 Triple \$149 Quad \$169 Smoking Non Smoking

Payment Information

Check or money order enclosed payable to Westin Park Central Please charge my credit card

▼CREDIT CARD NUMBER

□ □ □ □ - □ □ □ □ - □ □ □ □ - □ □ □ □ □ □ □ □ □ - □ □ □

▼EXPIRATION



▼SIGNATURE _____

In order to guarantee your reservation, you must either complete the credit card information below or send a check or money order covering the first night's stay. Make the check or money order payable to the hotel. Your room will not be guaranteed without one of the above. Reservations must be canceled 72 hours PRIOR to the date of arrival to avoid billing. You will be charged the room rate plus 15% for a room cancelled after the deadline.

CONVENTION PRE-REGISTRATION FORM

PRE-REGISTRATION DEADLINE: MARCH 2, 2009

- ☉ Mail completed form with payment to: TRTA
Attn: Accounting
313 E 12th St., Ste. 200 • Austin, TX 78701
- ☉ Banquet, Breakfast, Lunch and Tour tickets sold only in advance.
- ☉ Requests for refunds MUST be received in the TRTA office by March 2, 2009. No on-site refunds will be issued.

Personal Information

NAME (LAST/FIRST)		MEMBER ID	
SPOUSE (LAST/FIRST)		MEMBER ID	
ADDRESS			
CITY		STATE	ZIP
PHONE	EMAIL		

Pre-Registration Fee

	PRE-REGISTRATION DEADLINE: MARCH 2, 2009	
PRE-REGISTRATION	ON-SITE REGISTRATION PER PERSON \$25.00	
_____ \$20.00 PER PERSON	EVERY PERSON WHO ATTENDS ANY PART OF THE CONVENTION MUST PAY REGISTRATION FEE	\$ _____

Banquet Fee

	BANQUET, MONDAY (3.30.09 • 7:30–9 p.m.)	
_____ \$40.00 PER PERSON		\$ _____

Breakfast Fees

	HOTEL BREAKFAST, MONDAY (3.30.09)	HOTEL BREAKFAST, TUESDAY (3.31.09)	
_____ \$14.00 PER PERSON	_____ \$14.00 PER PERSON		\$ _____

Lunch Fees

	FOUNDATION LUNCHEON, MONDAY (3.30.09)	STILWELL LUNCHEON, TUESDAY (3.31.09)	
_____ \$30.00 PER PERSON	_____ \$25.00 PER PERSON		\$ _____
	HOTEL LUNCH, MONDAY (3.30.09)	HOTEL LUNCH, TUESDAY (3.31.09)	
_____ \$16.00 PER PERSON	_____ \$16.00 PER PERSON		\$ _____

Tour Fees

	JFK, SUNDAY (3.29.09 • 1–4:30 p.m.)	MATTITO'S, SUNDAY (3.29.09 • 7–10 p.m.)	
_____ \$36.00 PER PERSON	_____ \$51.00 PER PERSON		\$ _____
	KING TUT, SUNDAY (3.29.09 • 1–4 p.m.)	NOTIFICATION TO TOUR PARTICIPANTS If a tour is canceled because of low interest, refunds will be made within 30 days after the convention.	
_____ \$50.00 PER PERSON			\$ _____

TOTAL REMITTANCE

REQUESTS FOR REFUNDS MUST BE RECEIVED IN THE TRTA OFFICE BY MARCH 2, 2009. NO ON-SITE REFUNDS WILL BE ISSUED. ALL PRICES INCLUDE SERVICE CHARGES.	
	\$ _____

Payment Information

- Check or money order enclosed payable to TRTA Please charge my credit card

▼ CREDIT CARD NUMBER

□ □ □ □	□ □ □ □	□ □ □ □	□ □ □ □
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▼ EXPIRATION

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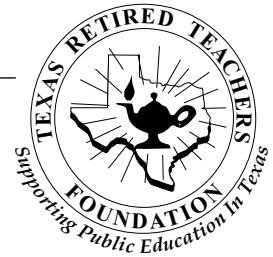


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Send address changes to:
Texas Retired Teachers Association
313 E. 12th St., Ste. 200 • Austin, TX 78701-1957
800.880.1650 • www.trta.org

**TRTF
NEWS UPDATES**



Texas Retired Teachers Foundation Program Update

The Texas Retired Teachers Foundation (TRTF) had its first meeting of the year on Monday, January 26, 2009. The Board of Trustees is very excited about pursuing new and updated programs this year.

As you know, Tim Lee, TRTA Executive Director, has been serving as the Acting TRTF State Coordinator. While Tim will continue to be instrumental in aiding the foundation's efforts in partnership with TRTA, many of the daily responsibilities of TRTF will now fall to Ms. Cindee Sharp.



Ms. Sharp joined TRTA as Foundation Specialist on January 26 and will be your liaison to the Board of Trustees. She has been working in higher education as an Admissions and Academic Advisor for the past 6 years. She is a graduate of Angelo State University and Keller Graduate School of Management. Previously, Cindee worked for the United Way of the Concho Valley in San Angelo, Texas. Feel free to stop by and say hello to Cindee or give her a call at the TRTA office.

You may have noticed a few changes to the TRTF website (www.trtf.org) recently! Included in those changes are the updated 2009-10 Student Scholarship and Classroom Assistance Grant Applications. The deadline for submissions for both programs is Friday, March 13, 2009 at 5:00 p.m.

This year, the TRTF is giving away ten \$500 student scholarships and four \$500 teacher grants. Student Scholarship applicants must be a relative of a member of the Texas Retired Teachers Association, must be pursuing a degree in education, and should include their official high school or college transcripts with their application. TRTF is thrilled to be supporting the educational careers of our future public educators and hopes you will spread the word to students you may know who could use a little extra help to go to college!

The TRTF Classroom Assistance Grants will be awarded to public school teachers demonstrating commitment to public education and Texas children through the creation of programs, events, or other learning platforms. Many teachers are facing budget cuts in the midst of troubling economic times and need the financial support to accomplish their classroom goals. Additionally, this effort provides TRTF and TRTA the opportunity to reach out to active employees about the good work being done by TRTA members.

The TRTF is also excited about a new program that will be launched in 2009 and needs your help. "A Helping Hand" is intended to provide public education retirees with charitable assistance for a one-time special need or short-term hardship. The TRTF currently is defining an application process for "A Helping Hand," but we need your feedback! Please send your suggestions and thoughts to info@trtf.org. With your help, the TRTF can have applications for potential aid recipients ready by July 2009!

The TRTF is anticipating the Texas Retired Teachers Association 56th Annual Convention in Dallas on March 29-31. TRTF is hosting its annual Foundation Luncheon on Monday, March 30 at 11:30 a.m. and we hope to see many of you there! The luncheon will be held on the 20th Floor of the Westin Park Central Hotel. The Board of Trustees will be updating you on recent accomplishments and the status of "A Helping Hand," and will also be announcing Scholarship and Classroom Grant winners. It is through your generosity and support that the TRTF is able to accomplish its goals, and we want to share this day with you! We look forward to your participation.

**FOR MORE INFORMATION ABOUT
THE TEXAS RETIRED TEACHERS
FOUNDATION LUNCHEON**

Contact Cindee Sharp
800.880.1650 • info@trtf.org