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# *The* VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION



**TRTA ASKS QUESTIONS ABOUT KEY ISSUES**

# **GUBERNATORIAL CANDIDATES RESPOND**



**By Tim Lee, Executive Director**

TRTA members want to know if the next Texas Governor will be a champion for public education retirees. After 10 years of not having a true permanent pension increase, TRTA members know that gubernatorial support with our legislative agenda is vital. In addition, the governor is also responsible for naming all the members on the Teacher Retirement System Board of Trustees. These appointees are the fiduciaries charged with managing your pension trust fund and for overseeing the TRS health insurance programs.

TRTA sent a gubernatorial questionnaire to Governor Rick Perry and Mayor Bill White. The questionnaire was written in partnership with the TRTA State Legislative Committee and is representative of the TRTA State Legislative Priorities. TRTA is not a political action committee and this association does not endorse candidates for political office. The candidates' responses to the questionnaire are unedited and are reprinted in their entirety for your information. For questions about this process or the information provided in this questionnaire, please contact TRTA. Remember, early voting begins October 18, 2010. *Continued on the next page.*



## 1. TRS PENSION FUNDING

**Background:** The Teacher Retirement System of Texas (TRS) is one of the best-funded public pension funds in the country; however, even with this good financial position, the fund is still not “actuarially sound” (its unfunded liability cannot be amortized within 31 years or less). The contribution level for TRS is presently 6.644 percent of the aggregate active teacher payroll. The TRS Board of Trustees has presented a plan to the Texas legislative budget planners (including the Legislative Budget Board and the Governor’s Office of Budget and Planning Policy) to increase funding for the TRS pension fund by 0.5 percent in both years of the coming biennium.

**As governor, what will you do to lead the State in making the TRS pension trust fund actuarially sound?**

**Perry:**

The TRS pension fund is a healthy and viable fund. In fact, the fund is currently operating at 82% funded ratio—above average for similarly-sized funds in large states, and much better than smaller systems that are struggling with ratios below 60%.

**White:**

When I became mayor of Houston, the city’s largest pension plan was significantly underfunded according to actuarial assessments. Working with the plan’s trustees and current and

retired employees, we made a number of changes in the plan to reduce the unfunded liability and make the plan more secure for current and retired employees. The changes included increased contributions by the City and future employees. There were no changes to the benefits already earned by current or retired employees. As governor, I will work with the TRS board, which should include an additional member representative, to make secure, responsible investments and ensure that contributions by the state and current and future employees are fair and reasonable in light of the benefits promised. When Rick Perry became governor, TRS had an actuarial surplus. As of the last audit, that surplus had turned into a \$21.6 billion deficit.

**Do you agree that reducing the State contribution rate to the TRS fund when it is not actuarially sound is not good public policy?**

**Perry:**

There are three income factors that influence the health of the fund: state contributions, member contributions and investment return. Of all these, investment performance makes up about two-thirds (close to 70%) of the current fund corpus. The most important driver of long-term viability is how well the fund’s investments are performing and to that end, it is vital that the TRS board has the necessary financial expertise and a strong long term focus to appropriately manage the trust assets.



**White:**

There are many variables that impact the actuarial soundness of the fund, and the rate of contribution by the state is one of those factors. To ensure the long-term security of the fund, I will review multiple scenarios and work with the stakeholders—including TRTA—to determine the best way to bring the fund into actuarial balance.

**Do you support the TRS Board of Trustees budget request that increases funding for the TRS pension fund in the next biennium?**

**Perry:**

Until the comptroller releases the official revenue estimate before the next legislative session, it is irresponsible to talk about budget increases. However, in the budget reduction letter that I sent to state agencies this spring, along with the Lt. Governor and Speaker, we specifically exempted state contributions to the TRS trust fund (and TRS-Care) from such reductions.

**White:**

First, let me say that I understand and know the importance of the lack of a cost of living increase for retired teachers. I will work with the legislature to develop a budget in the face of an anticipated \$18 billion shortfall. Education is the core business of state government, a priority for me, and I understand the importance of the TRS fund in making sure we attract and retain qualified teachers. My mother and father are both retired teachers, and I will do my best to help TRS during this challenging financial time, in light of the budget deficit and the many competing claims for limited state dollars.

**If elected, how would your administration work with the Texas Retired Teachers Association and the TRS Board of Trustees to ensure the funding for TRS pension trust fund is a top budget priority in the 82nd Legislative Session?**

**Perry:**

Funding for the TRS pension trust fund is certainly a priority—and that priority was made clear in the letters I sent to state agencies along with Lt. Governor Dewhurst and Speaker Straus stating that employer contribution requirements for state pension systems are exceptions to the baseline request limitation. As referenced above, these exemptions were made clear in both the request for the 5 percent cut as well as the request for the 10 percent suggested reductions for the 2012–2013 budget request.

**White:**

I will work with the legislature to develop a budget in the face of an anticipated \$18 billion shortfall. Education is the core business of state government, a priority for me, and I understand the importance of the TRS fund in making sure we attract and retain qualified teachers.

**In 2009, TRS paid approximately \$6.3 billion in retirement benefits. Nearly 95% of these benefits, almost \$6 billion, went directly to retirees who live and spend these dollars in Texas. This translated into an estimated \$611 million in state revenues, \$248 million in local government revenues, and more than 87,000 permanent Texas jobs.**

## 2. TRS PENSION INCREASE

**Background:** TRS retirees have not had a true cost of living pension increase in a decade! This 10-year period of no pension increases has left many retired education employees in a difficult and stressful financial position. Many people who served Texas public schools so dutifully are now wondering if elected officials have forgotten or simply do not care that there has been no permanent increase in their pension benefits for 10 years.

**Do you believe retired public education employees deserve better than being put on hold for 10 years in receiving a real cost of living increase?**

**Perry:**

Yes. In 2007, I signed into law a bill that authorized TRS to pay retired educators a 13th check. This last session, the legislature appropriated funds for another 13th check, but wrote in language that required the attorney general to comment on the legality of the 13th. The attorney general stated that the way the legislature wrote it was in fact not sufficient, but also noted that different language could have yielded a different result. Ideally, I would prefer future 13th checks to be paid by the TRS trust fund, but the attorney general also implied that he may have ruled differently if not for the awkward wording of the direct appropriation.

**CONTINUED ON NEXT PAGE**

# GUBERNATORIAL CANDIDATES RESPOND

**White:**

When Rick Perry became governor, the plan was more than adequately funded according to actuarial assessments, and it remained relatively well funded for the first couple of years. Under those circumstances, a real cost of living increase would have been affordable. I understand that retirees usually live on a fixed income and for many TRS retirees, the payments they receive from TRS may be their sole source of income. As I work with you and the TRS board to shore up the fund, I will remain mindful of the long time that has passed since retirees received a raise and I will work to see that that situation does not occur on my watch.

**As governor, what will you do to make getting a pension increase for education retirees a reality during the 82nd Legislative Session?**

**Perry:**

As I stated above, until we know the revenue estimate, and exactly what resources we will be dealing with next session, it is irresponsible to speculate on spending. That being said, I will continue to support the fund by ensuring the board has the tools necessary to have the strongest investment performance possible over the long-term.

**White:**

I am mindful and respectful of the promises made to educators who, like my parents, spent their careers helping our children,

**TRTA has consistently worked to protect your health care program. These efforts have kept premiums from increasing for the past six years! With no pension increases in nearly a decade, savings on health care premiums is a major victory for TRTA members.**



and I will work to keep those promises. TRS's ability to give an increase depends on many factors, including the state budget which impacts the state contribution, as well as the overall health of the fund, which is the responsibility of the TRS board to manage in a fiscally prudent manner.

**What strategies and plans have you considered/developed to ensure retired public education employees will receive regular pension increases?**

**Perry:**

Because investment performance is the largest single factor effecting the pension fund, I will continue to focus on making sure the board is composed of Trustees that understand financial markets and is committed to maintaining a strong, diversified and well positioned trust fund that will take full advantage of the market, and has the tools they need to do so.

**White:**

I will work to shore up the fund, as discussed above, so that it has the resources necessary to take care of its members. I have the experience and executive leadership skills to work with TRTA and others to make the necessary changes so that the fund will be secure.

## 3. HEALTH CARE

Background: Many education retirees participate in a State sponsored health insurance program called TRS-Care. TRTA and Texas political leaders have worked *extremely* hard to keep TRS-Care premiums from increasing. Unfortunately, the increasing costs of health care, as well as potential funding changes that may impact Medicare reimbursements, are putting tremendous pressure on the TRS-Care program. As you know, the TRS-Care program is a great example of shared responsibility between multiple funding sources including active employee contributions, school districts, and network discounts. Even with this shared responsibility, retiree premiums and out of pocket costs represent the highest sources of health care payments in the TRS-Care plan. Retirees are on the hook for more cost exposure while saddled with fixed incomes that are not growing. This is adding to the financial pressure so many public education retirees are experiencing today.

**As governor, what will you do to help control these skyrocketing costs, improve funding for TRS-Care, and ensure that state education retirees are able to participate in this state-sponsored health insurance plan that provides a high level of benefit and service?**

**Perry:**

The state sought to create good benefits for our retired teachers and I believe we should work to preserve those benefits. There



## **SPECIAL ANNOUNCEMENT:**

**TRS is now accepting petitions to nominate candidates for the retiree position on the TRS Board of Trustees. For more information, visit [www.trs.state.tx.us](http://www.trs.state.tx.us).**

is no question that the recently passed federal health care legislation contains some very harmful components, which will cost the state billions. Because the federal government is still writing the rules regarding these changes, the direct effect on TRS is currently unclear — the devil is always in the details. I will continue to pursue ways to defeat this one size fits all government takeover of health care.

*White:*

I worked hard as Mayor of Houston to keep our health plans affordable for active and retired employees. We were successful in controlling costs and improving the health of our employees, retirees and dependents so that they were minimally impacted when costs did rise. There may be opportunities to leverage purchasing to drive down costs. I look forward to working with TRTA and TRS leadership to explore options to maintain a high level of benefits while holding down costs.

**In addition, how will you work to ensure retirees that this health insurance plan will be available to them and to all public education retirees in the future?**

*Perry:*

Promises made should be promises kept.

*White:*

I will approach this issue with a long-term perspective so that we manage TRS-Care (and TRS in general) with an eye toward the future, and not just the next year or the next election. I left the Houston pension plan in better shape than I found it, and I will do the same for TRS.

**Will you work with the Texas Retired Teachers Association to keep health care premiums from increasing this session by protecting our TRS-Care budgetary funding?**

*Perry:*

I believe the employer contribution requirements for the employee group benefits should be protected from potential budget cuts, which is exactly why I included them in the exceptions to both the 5 percent cut requirement, and the 10 percent proposed baseline budget requests from state agencies.

*White:*

I will always work with TRTA, and I will be mindful of your issues, including the need to fund TRS-Care.

## **4. TRS PENSION FUND DEFINED BENEFIT PLAN**

Background: The TRS pension fund was established in 1937 as a traditional defined benefit pension plan. Nationally, in both the private and public sector, there is a push to eliminate these traditional retirement plans and move to something called a defined contribution plan. TRTA believes that a defined benefit plan is far more advantageous than a defined contribution plan and that maintaining the TRS pension fund as it was established in 1937 is of critical importance.

**As governor, how will you work to protect the TRS pension fund so that it remains a true traditional defined benefit pension plan?**

*Perry:*

This is a question that many states are facing as public pension plans around the country are struggling to meet benefit obligations. Texas' plans (TRS and ERS) remain relatively healthy, but it is always a good idea to debate long term options.

*White:*

I do not believe it is right to change the benefits for retired educators who have fulfilled their commitment and earned their benefits.

## **5. TRS PENSION FUND GOVERNANCE**

Background: The Teacher Retirement System Board of Trustees is responsible for the administration of the system under provisions of the state constitution and laws. The board is composed of nine trustees who are appointed to staggered terms of six years. Three trustees are direct appointments of the governor.

Two trustees are appointed by the governor from a list prepared by the State Board of Education. Two trustees are appointed by the governor from the three public school district active member candidates who have been nominated for each position by employees of public school districts. One trustee is appointed by the governor from the three higher education active member candidates nominated by employees of institutions of higher education. One trustee is appointed by the governor from the three retired member candidates who are nominated by retired TRS members.

Despite the large increase in the number of Texas state education retirees, there has been little legislative consideration to increasing the number of retired educators on the board from one to two members. As the number of retirees continues to increase, TRTA believes it is appropriate to expand the TRS Board of Trustees to include one more education retiree to represent this growing segment of TRS members.

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## GUBERNATORIAL CANDIDATES RESPOND

**As governor, would you support the addition of one more retired member on the TRS Board of Trustees?**

**Perry:**

Currently the board is made up of nine members. Three members are appointed by the Governor and must have demonstrable financial expertise. The Governor also selects two members from a list of nominees submitted by the State Board of Education, and those members must also possess financial expertise. Then, the Governor will appoint two members who are current public school employees, one member who is a retired and receiving benefits from the system and one member who works for an institution of higher education. Of a nine member board, four are not required to have the financial expertise that I believe is vital to the long term health of the fund. As I have stated before, the single biggest factor to the amount of money in the fund comes down to the return on the investments. I strongly believe the majority needs to possess financial expertise—and they need to be the best and brightest Texas has to offer.

**White:**

Yes. I would not have vetoed the bill passed in the last session that would have added another retiree to the board. I look forward to signing this bill in the next session.

**Do you support “direct election” of stakeholder members on the TRS Board so that the person who receives the highest number of votes is elected to the Board position (please explain)?**

**Perry:**

I appreciate the opportunity to appoint a member from the three stakeholder members sent to my office. Once I receive the names, I go through a very long process to make sure our appointees are the very best and my staff works hard to ensure there are no conflicts, financial or otherwise.

**White:**

I support a system that enables the plan members to have substantial control over the selection of board members. The plan members are the beneficiaries of TRS and deserve a meaningful say in its governance.

**In 2009, TRTA worked to pass HB 2656. This legislation passed the Texas Legislature unanimously, but was vetoed June 19, 2009. Please explain your position on this bill and the veto.**

**Perry:**

The long term health of the fund depends on the investment decisions that are made today. I vetoed HB 2656 because that legislation would have replaced a financial expert on the TRS board with another elected member that may or may not have such expertise. There is no question that TRS retirees should have representation on the board—and they do—but in these uncertain economic times we must protect the financial health of the fund and continue to require that a majority of the board have financial expertise. The main responsibility of the TRS board is to make investment decisions and develop investment policy for the educators who have served our state so admirably. The investment returns account for 70 percent of the fund. Above all else, the financial health of the fund must be the top priority and we need to maintain the expertise to keep that fund operating at the best capacity possible.

**White:**

As stated above, I would have signed that bill, which Rick Perry vetoed.

**If you agree that additional retiree representation is a good idea, how would you work with TRTA to ensure this occurs in the 82nd Legislative Session?**

**Perry:**

I look forward to working with TRTA on any issues they may bring before the legislature next session. Sometimes we will not agree, like on HB 2656, but my door will remain open for frank and honest discussions.

**White:**

It is my understanding that the same bill will be filed and will pass, and I will sign it.

## WHO GETS YOUR VOTE? ■



## **TRTA State Legislative Priorities**

### **1. Pension Increase**

TRTA will work to introduce legislation that provides a pension increase to retirees.

Rationale: Retirees have not received a permanent increase in their pension since 2001. This represents, at minimum, a 30% reduction in a retiree's buying power (3% rate of inflation multiplied by 10 years) since the last ad hoc pension increase. TRS annuitants need an increase in their pension benefits in order to meet the increasing financial demands of today's economy.

### **2. TRS–Care Full Funding Budget Commitment**

TRTA supports full funding of the statutory minimum contribution to the TRS–Care program of 1% of the aggregate active teacher payroll.

Rationale: More than 200,000 public education retirees and their dependents rely on the TRS–Care health insurance program. Current statute requires the state contribution to the TRS–Care program to be no less than 1% of the aggregate active teacher payroll. Meeting the state contribution requirements help preserve this program and ensure that public education retirees will not see an increase in the monthly health care premiums or a reduced benefit structure.

### **3. TRS Funding**

TRTA will work to introduce legislation that increases the State contribution to the TRS pension fund.

Rationale: Legislation should be passed maintaining a State contribution rate that would keep the pension fund financially sound and provide a benefit increase to TRS retirees. Independent TRS actuaries have suggested raising the state contribution to 7.2 percent in FY 2012 and then to 7.7 percent in FY 2013. TRTA agrees with this increase, but more may be needed to ensure the TRS fund's actuarial soundness.

### **4. Defined Benefit Preservation**

TRTA strongly supports the current defined benefit plan for public education retirees and employees, and will oppose any legislative action, such as a privatized plan, to modify or eliminate the defined benefit retirement plan for educators as it was established in the Texas Constitution in 1937.

Rationale: Public education employees have been assured of a traditional defined benefit plan as a part of the Constitution of 1937. A traditional defined benefit retirement plan provides public employees a guaranteed pension that will last their entire lives. A privatized plan does not guarantee these public servants the retirement they need and deserve.

### **5. TRS–Care Permanent Health Care Fund**

TRTA will work to introduce legislation that calls for the creation and funding of a new permanent TRS–Care health care trust fund.

Rationale: The creation and funding of a health care trust fund will help protect the TRS–Care program by prefunding future health care obligations for education retirees. The investment earnings generated by a permanent health care trust fund can be used as a future source of revenue to offset the costs of health insurance in the years to come.

### **6. TRS Board of Trustees—Trustee Election**

TRTA will work to introduce legislation that allows TRS annuitants to directly elect their trustee to the TRS Board of Trustees.

Rationale: The TRS Board of Trustees has one dedicated position out of nine for an elected TRS annuitant. When the position is up for election every four years, TRS annuitant members vote for their preferred candidate in a TRS administered election. The names of the top three vote getters are then forwarded to the Governor for his/her selection. Only one of the three can be chosen and it may not necessarily be the candidate with the most votes. TRTA believes that having an election process approved by the Governor in many ways disenfranchises the voters who took the time to participate in the election. The matter can be remedied by simply allowing the highest vote getter to be the elected annuitant on the TRS board.

### **7. TRS Board of Trustee Composition**

TRTA will work to introduce legislation that allows an additional dedicated retiree position on the Board.

Rationale: TRS annuitants have one dedicated trustee position on the TRS Board of Trustees. The number of retirees is increasing every year, and now is the time to add an additional annuitant on the TRS Board of Trustees to represent this growing population.

## **TRTA Federal Legislative Priorities**

### **1. GPO/WEP**

TRTA will work to repeal the two Social Security (SS) provisions known as the Government Pension Offset (GPO) and the Windfall Elimination Provision (WEP).

Rationale: The current GPO law discriminates against surviving spouses who are TRS annuitants by reducing or eliminating their SS benefits. The WEP law reduces SS benefits for two groups of TRS annuitants: (1) those who worked a portion of their careers in the military or the business world, and (2) those individuals who supplemented their school incomes by working part-time. The WEP law reduces a portion of an individual's SS earned from working outside of his/her public school employment. This unfairly penalizes retirees who earned their SS benefit.

### **2. Paying Health Care Premiums with Pre–Tax Dollars**

TRTA will work to pass federal legislation allowing public education retirees to pay their health insurance premiums with pre-tax dollars.

Rationale: Congress recently changed IRS provisions that now allow retired and disabled public safety officers to pay their health care premiums with pre-tax dollars. TRTA believes that this same provision should be extended to include public education retirees.



# PRESIDENT'S LINE



2010–2011  
TRTA PRESIDENT  
**Herbert Norris**



Comments/questions? Contact Herbert Norris  
903.566.2309 | [herbertnorris@sbcglobal.net](mailto:herbertnorris@sbcglobal.net)

The new school year is upon us and our local units are busy planning for the 2010–2011 year. TRTA is blessed with a committed and dedicated group of Officers and Standing Committee Chairmen and members.

Not only are we growing in numbers, but we are also growing in needs, complexities and challenges. As such, it is our goal to add additional components to TRTA's member benefits.

Despite all our plans, three things remain paramount: Membership, Education and Legislation.

**Membership**—Numbers still count. TRTA is the largest education retirement association, and we are also the most recognized, but we cannot rest on our laurels. Let us all please dedicate ourselves to the Each One Bring One initiative and keep our numbers—and, therefore, our voice—strong.

**Education**—We have to educate both retirees *and* active employees in the realm of public education to be informed about the differences between defined contribution and defined benefit plans. We have a responsibility to be vigilant in maintaining the defined benefit structure on behalf of future retirees.

**Legislation**—The key to any and all legislative success is our members. The next session of the Texas State Legislature begins in January 2011. The State Legislative Committee met in August to continue formulating the TRTA Legislative Plan. If you have thoughts or concerns, please contact one of the committee members. We must make concerted efforts to visit our Legislators NOW, while they are in recess, to set the tone for what is to come.

It is my privilege and pleasure to serve as president of this great organization. I am here to serve you and to address your concerns. Remember, there is no "I" in "TEAM," nor in "TRTA." Please stand with me in being a proud ambassador for the greatest public education retirement organization in the world!

## DADS Silver Lining Program Reaches Out to Texas Caregivers

The Texas Department of Aging and Disability Services (DADS) Silver Lining program announces a new 2011 program calendar and outreach tool for Texans with valuable caregiving and respite information.

Silver Lining, a volunteer outreach program of DADS, assists in establishing meaningful service opportunities that provide essential social connections for long-term care residents through planned volunteer visits. The program supports active volunteers with resources and recognition. The core goals of Silver Lining are to improve quality of life for everyone involved through volunteerism, provide health and wellness opportunities, and build awareness of the importance of community inclusion for long-term care residents.

Volunteers of all ages can work with residents living in a nearby nursing home, assisted living facility or state supported living center. The program works with partners from schools, civic groups, faith based organizations and corporate volunteer programs.

This year, DADS Silver Lining program is collaborating with the Texas Respite Coalition through a federal grant. Grant funds will assist in the creation of a new Lifespan Respite Care program for Texans. Some of the funds will be used for public outreach and provide information on the many different types of respite care available, as well as continue to educate Texans on the growth and diversity of caregiving roles. The 2011 Silver Lining calendar will provide content on both state and national caregiving/respite resources.

The Silver Lining calendar contest first began in the spring of 2009. Active volunteers submit a photograph from one of their volunteer visits with residents to communicate the importance of social connection. The contest kicks off annually at the start of National Nursing Home Week (on Mother's Day each year) and runs through July 31. Both electronic and printed versions of the calendar are available for all registered volunteers and partners while supplies last. Calendars will be available on October 23rd, National Make a Difference Day.

To get involved and impact the quality of life for another, call 800.889.8595 or visit [www.silverliningatdads.org](http://www.silverliningatdads.org). For information on other DADS volunteer opportunities, visit [www.volunteeratdads.org](http://www.volunteeratdads.org).







## MEMBERSHIP UPDATE

2010-2011

TRTA FIRST VICE-PRESIDENT/  
MEMBERSHIP CHAIRMAN

**Maridell Fryar**

As TRTA First Vice-President, I am responsible for a focus on Membership and will be working with the State Membership Committee this year. Our focus for the year will be on the following membership initiatives:

- Distribution and use of the "Each One Bring One" trifold cards
- Distribution of the new TRTA posters on the campuses in each school district

- Encourage membership renewals to participate in prize drawings (deadline is November 1 and winners will be announced in the next issue of *The VOICE*).
- Planning for Retirement Education Seminars
- Working on at-large members to affiliate with local units
- Working with other TRTA committees to collaborate on issues of importance

But the real work of TRTA takes place at the local unit and is done by dedicated individuals. I know that I will be able to count on each of you to lead the way in growing TRTA membership. The upcoming legislative session will be a tremendous challenge just to protect our TRS fund and to maintain the defined benefits status of our annuities. The larger TRTA is, the more clout we will have! Remember, if each one of us brings in just one more member, we will double in size and in strength.



## PUBLIC RELATIONS UPDATE

2010-2011

TRTA SECOND VICE-PRESIDENT/  
PUBLIC RELATIONS CHAIRMAN

**Mary Jane Hamilton**

*Image! Communication! Awareness!* These descriptive words highlight public relations. Everything we say and do is public relations. We want to focus on continuing to build positive public relations for TRTA at the local, district, and state levels. By portraying a confident, positive, professional *image*, by providing accurate, creative, newsworthy *communication*, and

by giving the public a genuine *awareness* of our projects and contributions, we will make our voice for ALL public education retirees heard!

The State Public Relations Committee met in August and outlined our actions for this year as follows: to help TRTA members promote and expand the Children's Book Project, develop district and local unit web pages and newsletters, expand the local use of media regarding TRTA activities, and educate our active school personnel through piloting our "Before the Bell" e-newsletter.

Most of the local units have scheduled their programs for this coming year, but if your local unit is still looking for ideas, we have a list of suggested programs on the TRTA web site under "PR Committee." Remember to plan programs that appeal to all ages and to both men and women. Interesting programs help maintain membership and increase attendance at our meetings.

Join with us in spreading the TRTA enthusiasm!

## TRTA Deadlines

November 1, 2010

Proposed bylaw amendments

January 1, 2011

Nominations for the E. L. Galyean Service Award

January 15, 2011

Running for office form

February 15, 2011

District & Local Unit award nominations, reports for Book Project, CVS hours & Walks-A-Million Program

March 1, 2011

Local delegate & officer forms

## 2010-2011 TRTA BOARD

PRESIDENT

**Herbert Norris**

IMMEDIATE PAST PRESIDENT

**Dora Scott-Nichols**

FIRST VP/MEMBERSHIP

**Maridell Fryar**

SECOND VP/PUBLIC RELATIONS

**Mary Jane Hamilton**

SECRETARY/TREASURER & FINANCE

**Francis Plemmons**

DIST. PRESIDENTS COUNCIL CHAIRMAN

**Kenneth Hanson**

DIST. PRESIDENTS COUNCIL VICE-CHAIRMAN

**Don Vardeman**

DIST. PRESIDENTS COUNCIL RECORDER

**Nancy Byler**

LEGISLATIVE COORDINATOR

**Bill Barnes**

ORGANIZATIONAL AFFAIRS

**Aubrey Cherry**

HISTORIAN

**Jesus Soto**

STANDING COMMITTEE CHAIRMEN

AUDIT **Willie Boyd**, COMMUNITY VOLUNTEER

SERVICE **Sherry Cumby**, HEALTH CARE

**Dr. Norma Hill**, INFORMATIVE & PROTECTIVE

SERVICES **Dottie Gardner**, MEMBER BENEFITS

**Patricia Macias**, RETIREMENT EDUCATION

**Lynda Gottschalk**, (Special Committees)

EMERGENCY RESPONSE **Judith Haney**, LOCAL

UNIT SUPPORT **Martha Kallus**



# REACHING NEW HEIGHTS IN SAN ANTONIO

## Plans Underway for 58th Annual Convention

TRTA is thinking ahead to next spring as we plan our upcoming 58th Annual TRTA Convention. The largest retired public educators association in the nation hosts its premier event in a different city in Texas each year, and in 2011, we'll be taking over the vibrant city of San Antonio.

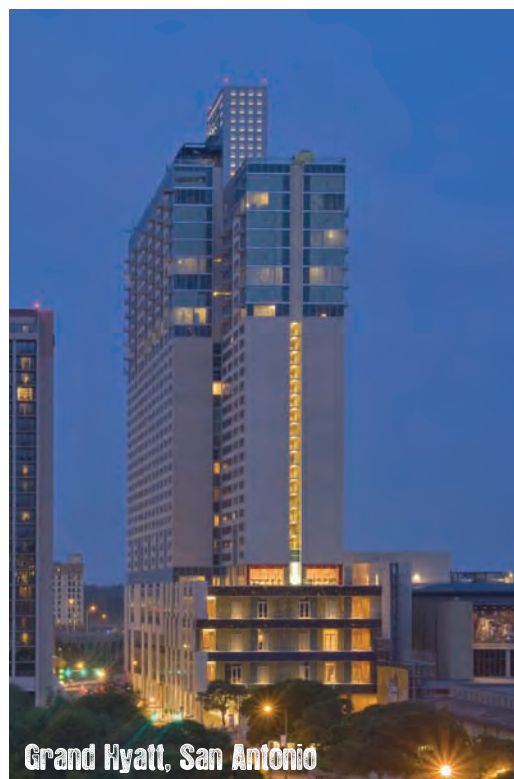
Mark your calendars for April 12-14, 2011, and make plans to join us at the Grand Hyatt San Antonio. The hotel's location could not be more perfect, as it's adjacent to the Henry B. Gonzalez Convention Center and HemisFair Park. Also, one new element of this convention is that guided tours of area attractions will not be provided. The reason for this is simple: when you step outside the Grand Hyatt, you're standing on the Riverwalk!

An added bonus is the fact that this year's convention will take place during Fiesta—San Antonio's world renowned cultural festival celebrated annually since 1891, making this its 120th anniversary. Fiesta, a long-running memorial to those who served in the historic battles of the Alamo and San Jacinto, has evolved over many decades into a festival celebrating the nuances of San Antonio as a bold and modern city steeped in old-world culture. If you've never had the pleasure of enjoying the sights, sounds and flavors of Fiesta, you are in for an absolute treat.

There's still more good news: TRTA has negotiated a special group rate at the Hyatt extending three days prior to the convention, as well as three days afterward, for those who wish to come early and/or linger and enjoy everything the town and festival have to offer. The special group rate is \$129. Be sure to book your rooms as soon as possible to take advantage of this fantastic opportunity.

Brilliant plans are being made for this year's theme, keynote speaker and other special touches to make the event memorable, worthwhile and enriching. A special "Each One Bring One" drawing will be held for each TRTA district, recognizing the hard work of current members who have gone above and beyond to recruit new members into this great association. Winners need not be present in order to claim their prizes. For more information on the campaign and drawing, please visit [www.trta.org/eachonebringone](http://www.trta.org/eachonebringone). The Foundation will have a photo booth again this year. Stop by to have your picture taken and help raise funds for a good cause!

Keep an eye on *The VOICE* and the TRTA web site, [www.trta.org](http://www.trta.org), for updates as they become available. One thing is certain: this is an event you will NOT want to miss! ★



Grand Hyatt, San Antonio



# TRTA DISTRICT PRESIDENTS RECEIVE LEADERSHIP TRAINING IN AUSTIN

All twenty 2010-11 TRTA District Presidents traveled to Austin for a leadership training conference July 7-9 where they received valuable information about plans and programs on the state level. They also had opportunities during delightful meal functions to become acquainted and share experiences.

On the first day, TRTA President Herb Norris set the tone for the meeting with his inspiring and enthusiastic vision for Association achievement possibilities during the year. The participants were also treated to a parliamentary procedure presentation by Organizational Affairs Coordinator Aubrey Cherry and an update on legislative preparations and plans by Legislative Coordinator Bill Barnes. Everyone received an updated *TRTA Leadership Manual* to use as a source of reference and help throughout the year.

District presidents were divided into three groups the following day and moved on a rotating schedule through three training sessions. These sessions were conducted by outgoing and incoming state standing committee chairmen working together to share important information regarding health care issues, retirement education, community and volunteer service, informative and protective services, and member benefits. The presidents also heard plans of a newly appointed special local unit support committee and the Texas Retired Teachers Foundation. Later that afternoon each of the TRTA Officers addressed the group on matters relating to public relations, membership and finance.

Executive Director Tim Lee shared some of his plans for the Association in the coming year and introduced members of the TRTA staff on the final morning of the conference. After being awarded "graduation" certificates by Leadership Training Committee Chairman Richard Roberts, the presidents returned home excited to face the challenges of the coming year. 📌

**2010-2011 District Presidents (image not in district order):** M. Gordon Taylor (District 1), Margaret De Ville (District 2), Dr. Martha Jones (District 3), Dottie Gardner (District 4), Roy Tully (District 5), Mary Sue Ribardo (District 6), Willie L. Boyd (District 7), Treaca Huston (District 8), Lou Jaggars (District 9), LaWynn Rogers (District 10), Bill Barnes (District 11), Don Vardeman (District 12), Ruth Spear (District 13), Tommie Jo Lindsey (District 14), Nancy Byler (District 15), Carrol Duncan (District 16), Mary Sexton (District 17), Loyce Phillips (District 18), Sally Soderstrom (District 19), Kenneth Hanson (District 20).



## TRTA MEMBER BENEFITS

### *A Home Safety Net for Seniors*

Nobody likes to think about a disaster taking place and certainly, we seldom think that a disaster will occur in our home. But unexpected situations arise and the outcome can be disastrous if we're not prepared.

One of the most common emergency situations in the home is a fall. Did you know that falls are the leading cause of death in the home, and they are the leading cause of accidental death among seniors? According to the New England Journal of Medicine, after a fall, ninety percent of persons who receive help within one hour will be able to live independently, but only 10 percent of those without help for 12 hours will be able to live at home. Fifty percent of seniors that fall require assistance from someone else to get up.

Falls are only one type of typical home emergencies. The other two are heart attack and stroke. In either situation delay is dangerous and help should be summoned immediately.

**Acadian On Call** personal emergency response service offers many benefits to TRTA members. The ability to summon help at the touch of a button for any emergency ensures safety, security, independence and peace of mind.

Acadian's dispatchers responding to calls are EMC (Emergency Medical Certified) and able to provide life support instructions over the phone. According to Scott Freitag, president, National Academies of Emergency Dispatch, "Acadian's certification assures quality training and a commitment to excellence for all of Acadian's medical alert accounts."

Additionally, Acadian uses state of the art equipment in both the monitoring centers and the actual emergency response system, and maintains four bi-directional, redundant centers to ensure clients are monitored 24-7 year round. Acadian's response time is one of the fastest in the nation, well below the times set as the "national standard."

The time to prepare for a disastrous event is **before** it occurs. TRTA members can enjoy the confidence of preparedness for an affordable monthly fee and will always receive free shipping.

For more information or to order, please go to [www.acadianoncall.com](http://www.acadianoncall.com) and click on the TRTA button, or call 800.259.1234 and mention Code: TRTA.



# TRTA Awards Program

A summary of the TRTA Awards Program is shown below. All awards—both at the District and Local Unit levels—are self-nominated awards and TRTA will honor all nominations. TRTA Awards Program packets will be mailed in December to District and Local Unit Presidents. In order for all awards to be prepared on time, all awards packets must be submitted to the TRTA office no later than February 15, 2011.

The E. L. Galyean Service Award shall be presented when the Board of Directors deems it appropriate to honor a person who exemplifies the qualities of dedication and ability to learn to motivate people toward the improvement of benefits and services for retired school personnel through TRTA. Only one person per year shall receive the E. L. Galyean Service Award (deadline for submission to the TRTA office is January 1, 2011).

District Award	Purpose of Award	Nomination By
Achievement Award	Recognizes district organization and programs; conducted 2 successful meetings with representatives from ALL local units	District President
Golden Apple Award	Recognizes TRTA organizational activities—based on organizing a new local unit or reactivating one or more local units (maximum of 3 awards)	District President
Grand Prix Award	Recognizes exemplary service, projects and/or contributions made in support of or on behalf of a retired teacher association at any level; awarded for total commitment to promoting the progress of education in TX or supporting the best interest of all retired educators—(maximum of 3 awards)	District elected Officers or TRTA Board of Directors
Appreciation Award	Recognizes unusual service at the district level; for service not covered by other awards—(maximum of 3 awards)	District President
School Bell Award	Recognizes news media (newspapers, radio and television stations or respective media staff) for portraying a positive viewpoint on education or educators and who have promoted the interest of retired educators in some exceptional way	District President
Local Unit Award	Purpose of Award	Nomination By
Recognition Awards—Basic, Banner & Bell Ringer	Recognizes local unit organization, programs and achievements (a local unit should apply for only highest award for which it qualifies)	Local Unit President
Membership Retention Awards—Bronze, Silver & Gold	Based on the percentage of retention of last year's membership: Bronze = at least 80% retention, Silver = at least 90% retention, Gold = 100% retention (only 1 award per membership level)	Local Unit President
Special Unit Award	Recognizes promotion of TRTA membership; awarded on % basis	Local Unit President
Silver Star Award	Recognizes TRTA membership recruitment; awarded to a TRTA member who recruits 5 or more new members	Local Unit President
Outstanding Recognition & Achievement Award	Recognizes group contributions to its community and achievements of local units whose members joined together on one or more projects	Local Unit President
Twenty-First Century Award	Recognizes outstanding service; awards given according to number of members in local unit (# of awards based on # of members)	Local Unit President
Appreciation Award	Recognizes unusual service at the local unit level; for service not covered by other awards	Local Unit President
School Bell Award	Recognizes news media (newspapers, radio and television stations or respective media staff) for portraying a positive viewpoint on education or educators & who have promoted the interest of retired school personnel in some exceptional way	Local Unit President or Local Unit Awards Committee
Volunteer Service Award	Recognizes a member of a local unit with the highest volunteer service hours in that local unit	Local Unit President (may only submit one nominee)
Health Care Award	Recognizes a member of a local unit walking the most steps/miles for the Walks-A-Million Program	Local Unit President (may only submit one nominee)



## 2011-2012: RUNNING FOR TRTA OFFICER POSITIONS

If you are a qualified member interested in running for a TRTA office for the year 2011-2012, please complete the filing form and submit it to the TRTA office (deadline is January 15, 2011). The form can also be downloaded at [www.trta.org](http://www.trta.org). In accordance with the TRTA Bylaws, the elected officers of the association shall be President, First Vice-President, Second Vice-President, and Secretary/Treasurer. Below are steps governing the election of TRTA Officers:

### Officers of the Organization, Article VII, Section 1.1

TRTA shall have the following statewide officers, who shall be elected or appointed as specified:

1. The officers elected by the House of Delegates shall be the President, First Vice-President, Second Vice-President, and Secretary/Treasurer. A candidate for any of these offices shall have been a participating member of TRTA and of a Local Unit for at least three (3) years, and shall have served as an elected officer of a District or Local Unit, but need not have served as a statewide officer.

### Nominating Committee Guidelines TRTA Operations Policy

1. The Nominating Committee shall solicit nominations for elections to statewide office in the September and December issues of the TRTA publication. Nominee forms should be requested from the TRTA administrative office and must be completed and returned to that office with photos, postmarked no later than January 15. All nominees meeting the established criteria, as determined by the Nominating Committee, shall be candidates for the respective offices. Biographical data and photos of all candidates shall be published in the February issue of the TRTA publication.

### Campaigning for TRTA Office/Position TRTA Operations Policy

Campaign procedures to be followed by all candidates for TRTA office are:

1. Whether announced or unannounced as a candidate for a TRTA office, the campaigning period shall begin 90-days prior to the start of the TRTA convention and conclude upon the election of TRTA officers.
2. TRTA shall not pay campaign expenses incurred for any candidate.
3. Name and address mailing labels of district and local unit presidents, and the Board of Directors, may be provided to TRTA officer candidates upon written request to the Executive Director. A payment of \$25 is required. The request must indicate that the label information will be used only in the campaign for the current office sought.
4. A request for mailing labels shall be discussed only with staff and/or officers, and only for the process of providing the labels.

### Elections, Article VIII, Section 2

1. The House of Delegates shall elect the officers by secret ballot at the annual TRTA Convention. A majority vote shall elect. If no majority vote is achieved, a run-off election shall be conducted between the two (2) candidates receiving the most votes. If there is only one (1) nominee for an office, a vote for that office may be by voice.

## FILING FOR TRTA STATE OFFICE

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Local Unit \_\_\_\_\_

I am filing for:

☐ TRTA President

☐ TRTA 1st Vice-President

☐ TRTA 2nd Vice-President

☐ TRTA Secretary/Treasurer

I understand that a candidate for this office shall have been a participating member of TRTA and of a Local Unit for at least three (3) years, and shall have served as an elected officer of a District or Local Unit, but need not have served as a statewide officer.

My credentials are:

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A postmark of January 15, 2011 is the deadline for TRTA to receive this completed form and a color photo.

Mail to TRTA | 313 E. 12th St., Ste. 200 | Austin, TX 78701

# OUTLOOK



## LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

### **"A HELPING HAND"**

Launching statewide in October 2010

15

### **NOVEMBER IS FOUNDATION MONTH**

Increase awareness of the Foundation

16

### **NEW MAILING ADDRESS!**

Send all correspondence to TRTF, 313 E. 12th Street, Suite 200, Austin, TX 78701-1957.

## **"A HELPING HAND" STATEWIDE LAUNCH!**

The Texas Retired Teachers Foundation (TRTF) is asking a lot of TRTA members this fall, as we prepare for three events: the statewide launch of "A Helping Hand," Foundation Month in November, and the TRTF Annual Appeal Letter.

Why are these three actions so important? Because they enable us to come together, so we can help each other! Through three distinct charitable programs, TRTF and TRTA members are able to nurture future educators, inspire current public school teachers, and assist education retirees experiencing critical emergencies.

In 2010, TRTF provided \$5000 in scholarships to education majors, and \$5000 in grants to public school teachers. \$2000 has been donated to members experiencing critical emergencies through the "A Helping Hand" program. Recently, we provided \$1200 to purchase a wheelchair for a cancer patient in east Texas, greatly improving her mobility and independence.

The credit for the successful pilot launch of "A Helping Hand" belongs to districts 8, 12, 17 and 20. Local unit presidents and foundation representatives ensured that TRTA members were aware of the program's availability and assisted them in the application process. Every local unit and district will adopt this role as TRTF prepares to launch the program statewide in October.

TRTF will host five free training webinars in October 2010 on how to start the program. Participants need to have access to a computer, the internet, and a telephone. You should have your training materials, which were mailed in September, handy during the webinar.

The following training dates are available: Oct. 1 (10 a.m.), Oct. 4 (2 p.m.), Oct. 12 (10 a.m.), Oct. 20 (2 p.m.), and Oct. 28 (10 a.m.). Please select one date and RSVP to Cindee Sharp ([help@trtf.org](mailto:help@trtf.org) or 800.880.1650) to be included in the webinar. Don't forget to include your email address! Instructions will be emailed to you.

The Foundation looks forward to joining you, so that we can offer "A Helping Hand" to retirees statewide!

## **How Can I Help?**

As you may have noticed, the statewide launch of "A Helping Hand" is coinciding with Foundation Month (November) and TRTF's annual appeal letter. With so many activities occurring at once, you may be wondering how best to show your support.

### **How to help**

1. **Local Units:** Designate your fall meeting towards increasing awareness of the Foundation and raising funds to support its three charitable programs: "A Helping Hand," Classroom Assistance Grants, and Student Scholarships.
2. **Foundation Representatives:** If you are a District President or Foundation Liaison, or a Local Unit President or Foundation Representative, participate in training held in October to learn how to begin "A Helping Hand" in your area. See details in article!
3. **TRTA Members:** When a letter arrives in your mailbox from TRTF in November, consider making a donation to TRTF and designating your gift for one of TRTF's three charitable programs.





*The* **VOICE**

Send address changes to:  
Texas Retired Teachers Association  
313 E. 12th Street, Suite 200 | Austin, TX 78701-1957  
800.880.1650 | [www.trta.org](http://www.trta.org)



## Helping Educators of the Past, Present and Future

### November is Foundation Month

The Texas Retired Teachers Foundation and You...

Helping educators of the *past* (through “A Helping Hand” assistance grants), *present* (through Classroom Assistance grants for public school teachers), and *future* (through Student Scholarships).

### When we come together, we can help each other!

Designate your fall meeting to increase awareness of the Texas Retired Teachers Foundation. Contact us to learn how you may participate.

**800.880.1650**

Texas Retired Teachers Foundation

313 E. 12th Street, Suite 200, Austin, TX 78701-1957  
[www.trtf.org](http://www.trtf.org) | [info@trtf.org](mailto:info@trtf.org)

TEXAS RETIRED TEACHERS FOUNDATION

# OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

TEXAS RETIRED TEACHERS FOUNDATION

 I WANT TO  
**HELP!**

DONATION  
CARD  
DONATIONS ARE  
TAX DEDUCTIBLE

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

Please accept my donation of:

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

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

STATE \_\_\_\_\_

ZIP \_\_\_\_\_

PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

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