

# TEXAS RETIRED TEACHERS FOUNDATION



# **DISTRICT FOUNDATION LIAISON AND LOCAL UNIT FOUNDATION REPRESENTATIVE RESOURCE GUIDE**

**February 2018**

# Texas Retired Teachers Foundation

313 E. 12<sup>th</sup> St., Ste. 220, Austin, TX 78701  
512.476.1622 ▪ 800-880-1650 ▪ help@trtf.org



## Foundation Liaison & Representative Resource Guide

### What Will You Find in this Resource Guide?

- I. Foundation Liaison & Representative Roles & Responsibilities
- II. Frequently Asked Questions
- III. A Brief History of the Texas Retired Teachers Foundation
- IV. TRTF Annual Calendar of Events
- V. TRTF Talking Points
- VI. “A Helping Hand” Documents
- VII. Donation Cards
- VIII. Brochures (available by request)
- IX. Contact Us

*The TRTF Resource Guide is updated frequently. For the most recent version, please visit <http://www.trtf.org/index.cfm/resources> or contact us at [cindee@trta.org](mailto:cindee@trta.org) or [shala@trta.org](mailto:shala@trta.org), subject: Resource Guide.*

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## Foundation Liaison & Representative Roles & Responsibilities

The Foundation Liaison or Representative should be able to:

- Speak on behalf of the Foundation at functions such as local and district meetings, as well as answer basic questions about the activities and state of the Foundation. Any questions that the representative feels uncomfortable answering may be directed to TRTA Associate Director Cindee Sharp. (see Talking Points for additional info and sign up for the electronic newsletter *The Ledger*)
- Provide donation cards and/or brochures to local unit members as needed. If the representative does not have any donation cards or brochures, he or she may contact the TRTA state office to request them.
- Accept donations from local unit members or other people in the community. Donors should provide the representative with either a donation card (see enclosed) or a sheet of paper specifying the donor's name, address, and phone number, as well as whether or not the donation is being made in honor or in memory of someone. **NOTE:** All donations should be forwarded immediately to the Foundation office at 313 E. 12<sup>th</sup> St., Ste. 220, Austin, TX 78701. Checks should be made out to the Texas Retired Teachers Foundation. TRTF will send acknowledgements and receipts to donors. For questions about donations that have been made, please contact Cindee Sharp at TRTA ([cindee@trta.org](mailto:cindee@trta.org)).
- Serve as "A Helping Hand" representative, which includes providing applications to retirees in need, assisting them in completing paperwork, and forwarding all paperwork to TRTF. At times, serve as "Disaster Relief Program" representative.

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## Frequently Asked Questions

### **What is the Texas Retired Teachers Foundation?**

The Texas Retired Teachers Foundation (TRTF) is the philanthropic arm of the Texas Retired Teachers Association (TRTA). Founded in 1988, the Foundation's original purpose was to raise funds to build the home office for TRTA in Austin. After the successful completion of the TRTA building, the Foundation was incorporated as a 501(c)3 non-profit organization. A brief history of the Foundation may be found in this training packet or at <http://www.trtf.org/history.htm>.

### **What is the mission of TRTF?**

The Texas Retired Teachers Foundation is a non-profit organization that works to provide resources for retired TRS annuitants, as well as active and beginning teachers.

### **What are TRTF's charitable programs?**

TRTF supports three charitable programs: beginning teacher scholarships (previously student scholarships), classroom assistance grants, "A Helping Hand," and our educational program, the Legacy Campaign. These programs enable TRTF to support retired, current, and future educators.

TRTF also supports the Lehr-Pritchard Endowment Fund to raise revenue for the long-term financial support of "A Helping Hand." For this effort, TRTF is asking every member of TRTA to consider making a one-time donation of \$30 and designate it for the Lehr-Pritchard Endowment Fund, helping TRTF reach its goal of \$2,000,000 in donations by December 31, 2019.

TRTF also began a Disaster Relief Program in the summer of 2017 after the devastation caused to multiple Texas counties and cities by Hurricane Harvey. TRTF plans to continue utilize the Disaster Relief program to aid with other potential natural disasters in Texas that may occur in the future.

Beginning teacher scholarships are awarded to recent college graduates who are about to begin teaching for the very first time. All recipients must be relatives of a TRTA member. Classroom assistance grants are awarded to public school teachers who demonstrate a daily commitment to public education and Texas children through the creation of programs, events or other learning platforms. "A Helping Hand" provides public education retirees with financial assistance for a one-time special need or short-term hardship. Recipients include anyone who is eligible to receive an annuity from the Teacher Retirement System of Texas. The Legacy Campaign provides factual resources about defined benefit retirement plans, and supports a positive image of public education and current and retired school personnel in Texas.

### **Does the Foundation need donations?**

Yes. In order to support TRTF's programs, donations are needed. If every member of TRTA donated

just \$1, TRTF would raise an astounding \$80,000! If every member of TRTA donated \$2, that amount would double to \$160,000! We make a significant difference in the lives of many students, educators and retirees thanks to the generosity of TRTA members.

**How can I make a donation to the Foundation?**

Please send a check or money order to the Texas Retired Teachers Foundation, 313 E. 12th St. Ste. 220, Austin, TX 78701. All donations are tax deductible and will be acknowledged by the Foundation office. Donors may designate funds for any of the Foundation’s charitable programs or Lehr-Pritchard Endowment Fund, and may give a gift in memory or honor of a loved one. Recipients of memorials and honorariums may be notified of the donation if the donor provides the name and mailing address of the recipient to the TRTF office along with their donation.

Donations may be made over the phone using a credit card by calling 1.800.880.1650 and asking for Cindee Sharp or Ashley Friedrichs. Donations may also be made through the TRTF website [www.trtf.org](http://www.trtf.org) by clicking on the Donate tab.



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## Frequently Asked Questions continued...

### **Board of Trustees 2018-2019**

Jamie Larson, Board President

Carlos Ortiz, Vice-President

Lynn Granzin, Secretary-Treasurer

Mary Nell Short

Martha Kallus

Carla Meuth

Ronnie Jung

Brenda Ritter

Elva Garcia

Dr. Kenneth Laycock, Board Adviser

*(note: officer elections are held yearly during TRTF annual meeting  
at the TRTA Convention)*

For questions, suggestions, or brochures  
please contact Cindee Sharp at  
1-800-880-1650 or [help@trtf.org](mailto:help@trtf.org).

The **TRTF website** is updated  
frequently to answer your questions: [www.trtf.org](http://www.trtf.org).



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## A Brief History of the Texas Retired Teachers Foundation

The Texas Retired Teachers Foundation (TRTF) was formed in 1988 as a part of the Texas Retired Teachers Association (TRTA) under the name the Building Fund Trust. The trust was formed for the purpose of acquiring and providing a home office building for TRTA in Austin.

From 1988 to 2000, the Building Fund Trust raised funds through the “Walkway by the Wall” campaign, accumulating as much as \$125,000 in one year. The Building Fund Trust also purchased a lot at 12<sup>th</sup> and Trinity streets in Austin in 1992, which was rented out for parking until construction started.

In the late 1990s, the Building Fund Trust committee members learned it was not technically possible to accept tax-deductible donations as a part of TRTA (a 501(c)(4) nonprofit organization) because of TRTA’s involvement in legislative activities.

As a result, TRTF was incorporated as a 501(c)(3) nonprofit foundation with an educational and charitable mission in 2000. Such nonprofit foundations are prohibited from participating in lobbying and other political activities.

The funds procured through the Building Fund Trust and the responsibility of the TRTA building were transferred to the Foundation Board of Trustees. This action was followed by the TRTA Board of Directors authorizing a 99-year lease of the lot at 12<sup>th</sup> and Trinity to TRTF. In return, the association would receive prepaid rent on 10 percent of the available office space and seven parking spaces.

To build the office center, TRTF formed an alliance known as the 12<sup>th</sup> Street Limited Partnership with Development 2000, Inc. Under the agreement, Development 2000, Inc. assumed the role of managing partner and 30 percent ownership of the building while TRTF gained 70 percent ownership of the office center.

TRTF achieved a landmark goal as construction of the Trinity Office Center ended in 2004 and the building was fully leased by 2006. That year, TRTF entered a new phase of growth and development, and has since launched new programs to support public

education in Texas and enhance the lives of retired teachers and school personnel. Programs include scholarships for students pursuing degrees in education, and grants for public school teachers to meet classroom needs.

TRTF launched a pilot version of its newest charitable program, “A Helping Hand,” in February 2010 in four districts: 8, 12, 17, and 20. This program provides financial assistance for education retirees in critical need. “A Helping Hand” launched statewide in October 2010, and has provided over \$102,000 in assistance to date.

In November 2011, TRTF began a new venture, the Legacy Campaign. The purpose of the Legacy Campaign is to raise funds for developing factual resource materials about defined benefit pension plans and the value of the Teacher Retirement System of Texas. Additionally, the campaign promotes a positive image of public education in Texas, with an emphasis on appreciating the legacy of our retired and current school personnel.

In October 2013, TRTA and TRTF reached a new landmark as the building was refinanced and TRTA entered into an agreement to purchase the remaining 30% of the partnership not owned by TRTF. As part of the purchase, TRTA purchased a 29% limited partnership interest in the partnership from the existing limited partners. In addition, TRTA formed TRTA GP, LLC, a single member non-profit limited liability company which purchased the 1% general partnership interest owned by the then existing general partner of the partnership. After this acquisition, TRTF and the TRTA own 100% of the entire office building and garage. This is a momentous achievement for TRTF and TRTA!

TRTF created the new Beginning Teacher Scholarship program to replace its Student Scholarship program in 2017. The program provides funds to recent college graduates to assist with paying for certification tests and materials for the new teacher’s very first classroom. The first ten recipients of this program were announced at the 64<sup>th</sup> Annual TRTA Convention in March 2017.

During the summer of 2017, TRTF created the Disaster Relief Fund as a response to the devastation left in the wake of Hurricane Harvey. Raising more than \$150,000, the Foundation was able to assist both retired and active educators with short-term and long-term financial assistance. TRTF plans to continue the Disaster Relief Program, allowing the organization to raise funds to help educators when other natural disasters occur in Texas in the future.

The Board of Trustees, TRTA Executive Director Tim Lee, and TRTA Associate Director Cindee Sharp work diligently to enhance the foundation’s programs. We welcome your suggestions to improve the lives of education retirees.



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## TRTF Annual Calendar of Events

- **January/February/March**
  - *Accepting applications for Beginning Teacher Scholarships and Classroom Assistance Grants (applications due mid-March)*
- **March or April**
  - *TRTA Annual Convention*
    - TRTF Annual Meeting, including election of Board of Trustees officers
    - TRTF Training Session
    - TRTF Annual Luncheon (or Breakfast)
      - Recipients of scholarships and grants announced
- **May-September**
  - *TRTF delivers grant and scholarship checks when possible, public relations “tour”*
- **September-December**
  - *Fall meetings are often designated by local units as a time to raise awareness of the Foundation and host a local fundraising campaign*
- **November**
  - *Foundation Month & Annual Appeal Letter*
    - Local units not meeting in November designate Foundation month earlier or later than November; however, the TRTF state office sends its Annual Appeal letter to all members of TRTA in November, through *The VOICE*
  - *Beginning Teacher Scholarship and Classroom Assistance Grant applications for the upcoming year will become available at this time*
- **December**
  - *Fundraising totals will be announced*

(Please note that “A Helping Hand” applications are accepted throughout the year and may be submitted for consideration at any time. It is possible grants for this program may not be awarded at certain times of the year if funds are not available. Disaster Relief Fund applications are accepted during specified natural disasters for which TRTF has raised funds to help retired and active educators).



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## TRTF Talking Points

*(For use at district and local unit meetings; choose the points that apply most to your unit or those that can be shared in the time allotted)*

- I. TRTF has a newly designed website! Members can still find the site at the same link ([www.trtf.org](http://www.trtf.org)), but will find that it is easier to navigate and more aesthetically pleasing.
- II. November 2017 was designated by the TRTA Board of Directors as Foundation Month.
  - a. \$87,000 in donations were received from this fundraising effort!
  - b. The purpose was to increase awareness of the Foundation, including recent accomplishments and goals.
  - c. The Foundation's 2018-19 goals include program expansions:
    - i. TRTF will provide 15 \$750 beginning teacher scholarships to recent college graduates who will be teaching for the first time in 2018.
      1. This is an increase from the 10 scholarships awarded in 2017, and the first ten awards were given during the TRTA Convention in March 2017.
      2. This program replaced the student scholarship program in 2017.
    - ii. TRTF will provide 30 \$500 classroom assistance grants to public school teachers in Texas in 2018.
      1. This is an increase from the 15 grants awarded in 2017.
      2. Applications for the beginning teacher scholarship program and the classroom assistance grant program are available on the TRTF website [www.trtf.org](http://www.trtf.org) and are due to the TRTF office on March 15, 2018 by 5:00 p.m.
    - iii. TRTF will provide \$17,500 in grants to retirees in critical need through the "A Helping Hand" program in 2018.
    - iv. TRTF will continue to raise funds for the Lehr-Pritchard Endowment Fund, which began in 2016 to honor of the 25<sup>th</sup> anniversary of the CPI Catch-Up Plan, led in part by former TRTA Executive Director and TRTF Trustee Mike Lehr. TRTF is asking all members of TRTA to consider donating \$30 to the fund, which will be utilized to fund the "A Helping Hand" program for the foreseeable future, as we anticipate more and more retirees may be in need of assistance. The fund raised over \$10,000 at the 63<sup>rd</sup> Annual

TRTA Convention during the Foundation Luncheon. TRTF hopes to reach \$2,000,000 in donations for this program by 2019.

- III. As many of our members are aware, Hurricane Harvey devastated the Texas coast, leaving many educators, especially retirees, in need of emergency assistance. In response to this disaster, TRTF created the Disaster Relief Fund. This will be a perpetual fund available to respond to natural emergencies as they occur.
  - a. Members of the Teacher Retirement System of Texas (TRS) living in disaster-affected counties may apply for either short-term or long-term assistance from TRTF.
  - b. If you know of a retiree or active educator impacted by a major natural disaster, encourage them to contact TRTF to see if aid is available.
    - i. If aid is not available through this program, affected retired and active educators may still apply for “A Helping Hand.”
  - c. TRTF raised more than \$150,000 for victims of Hurricane Harvey and distributed these funds to more than 400 retired and active educators.
  - d. Donations continue to be accepted for the Disaster Relief Fund, and may be made online on the TRTF website or via snail mail: 313 E. 12<sup>th</sup> Street, Ste. 220, Austin, TX 78701.
- IV. Donations:
  - a. Donations are needed to support our four standard programs: Beginning Teacher Scholarships, Classroom Assistance Grants, “A Helping Hand,” and the Legacy Campaign, as well as the Lehr-Pritchard Endowment Fund and Disaster Relief Fund.
  - b. How to donate:
    - a. Donation cards are available in the Foundation brochure and in *The VOICE*.
    - b. Members can also donate online through the TRTF website ([www.trtf.org](http://www.trtf.org)).
    - c. Members may call the TRTF office in Austin at 1.800.880.1650 and speak with Cindee or Ashley F. to make a credit card donation over the phone.
  - c. Donors may designate funds for a specific purpose (any of the four standard programs, or the Lehr-Pritchard Endowment Fund or Disaster Relief Fund).
    - 1. Donors may also give a gift in memory or in honor of someone.
    - 2. When donating in memory or in honor of someone, please provide contact information of the person to receive a notification of the donation, including mailing address.
  - d. All donations will be acknowledged by the Foundation office.
  - e. Simple, cost-effective fundraising techniques are available on the TRTF website should your district or local unit choose to raise money for TRTF during the year.
- V. TRTA members have many questions about TRTF’s educational program, the Legacy Campaign.
  - a. The Legacy Campaign funds are used to create factual materials about the value of the TRS defined benefit plan, as well as the legacy left behind by our Texas retired school personnel and their impact on the education field.

- b. The Foundation is partnering with TRTA in this campaign to develop educational documents and videos.
  - i. The first video “Yesterday, Today & Tomorrow: The Texas Public Education Legacy” was completed in March 2012 and can be viewed online at the following link: <https://trtf.org/about/legacy>.
  - ii. A second video “Preserving the Legacy: Actives and Retirees Working Together” was completed in August 2013 and may be viewed on the following link: <https://trtf.org/about/legacy>.
- VI. It is important that every local unit designate a person to serve as their Foundation Representative.
  - a. This person should have a computer and an email address, as most correspondence sent by the Foundation is through email. This helps the Foundation reduce costs and use funds for charitable programs.
- VII. TRTF has a monthly electronic newsletter available by email entitled *The Ledger*.
  - a. TRTF needs updated email addresses for all district and local unit presidents, as well as foundation liaisons and representatives. Please contact Cindee Sharp to sign up ([help@trtf.org](mailto:help@trtf.org)).
- VIII. The 65<sup>th</sup> Annual TRTA Convention will be held in San Antonio April 8-10, 2018.
  - a. The Foundation will host a luncheon on April 10, 2018 at 12:15 p.m. Attendees may provide donations at this event and include memorials and honorariums. Recipients of the Beginning Teacher Scholarships and Classroom Assistance Grants will also be announced.
  - b. The Foundation will host a training session for representatives and liaisons on April 9, 2018 at 2:00 p.m.
- IX. TRTF has a Resource Guide for Foundation liaisons and representatives (email Cindee at [help@trtf.org](mailto:help@trtf.org) to request one) or download one from the TRTF website (<https://trtf.org/news/resources-for-our-liaisons-and-representatives>).
- X. Foundation brochures are available and may be requested by calling the TRTA state office at 1.800.880.1650 or sending an email to [help@trtf.org](mailto:help@trtf.org).
- XI. TRTF’s program, “A Helping Hand,” has been very successful since its statewide launch in 2010:
  - a. The purpose of “A Helping Hand” is to aid public education retirees in critical need by providing grants.
  - b. The program has provided over \$113,000 in grants to more than 110 retirees.
  - c. How to apply for “A Helping Hand”: Local unit presidents or foundation representatives will accept applications and forward them to the TRTF office in Austin; a committee will review the applications and upon approval, funds will be forwarded directly to a vendor or company to help the retiree pay for a bill or bid. Please do not hesitate to send in applications.
  - d. A list of recipients is not available for the public, as all applications are kept confidential. Only those recipients who give us permission to share their story are revealed. Grants have been provided for various needs, including but not limited to space heaters, utilities, medical and dental bills, eyeglasses, food, and a wheelchair. One woman in the Houston area had an eye disease that could

only be corrected through special contact lenses or surgery. The Foundation was able to purchase the lenses, which re-shaped her cornea, allowing her to see for the first time in many years. Flood victims have been able to receive assistance for home repairs. A lady in east Texas lived through most of the winter in 2016-17 without heat, but TRTF was able to pay for home repairs to restore heat to her home. TRTF has assisted retirees with purchasing hearing aids and dentures.

- e. If you are a new Foundation Representative or Liaison, or new District or Local Unit President and would like to participate in training for the program, please contact Cindee at [help@trtf.org](mailto:help@trtf.org).
- XII. What are the Foundation's plans for the future?
- a. TRTF will continue its four charitable programs: beginning teacher scholarships, classroom assistance grants, "A Helping Hand," and the Disaster Relief Fund as well as its educational program, the Legacy Campaign. TRTF will continue to raise funds for the Lehr-Pritchard Endowment Fund, with a goal of reaching \$2,000,000 by December 31, 2019.
  - b. Additionally, TRTF is researching opportunities to apply for grants from larger organizations and forming corporate partnerships. TRTF's vision is to become the leader in providing useful services to retired Texas school personnel.
  - c. TRTF will work closely with TRTA to continue the Legacy Campaign, creating resources that may be used by all TRTA members, TRS annuitants, and active school personnel.

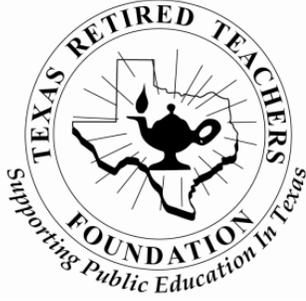


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### **“A Helping Hand” Training Documents:**

- **District and Local Unit Instructions**
- **Confidentiality Agreement**  
(complete and return to TRTF)



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## How to Process “A Helping Hand” Applications: Instructions for Districts and Local Units

1. Keep “A Helping Hand” assistance request applications and guidelines on file. When an application is requested, please include a copy of the guidelines and application instructions with each application.
2. Applications may be completed by the grant seeker, or a concerned citizen, friend, or family member of the grant seeker.
3. If the applicant needs assistance completing the application, please assist them.
4. Verify that the applicant has completed everything in Section 1 of the request.
  - a. Verify with the applicant that the grant seeker address provided is where he or she may receive mail currently, in the event that he or she is presently displaced from his or her home.
  - b. Confirm that the applicant supplied a copy of his or her most recent 1040 or other form of proof of income (ex: 1099R from TRS, bank statement showing deposits, etc.).
  - c. Confirm that the applicant supplied qualifying documentation. Qualifying documentation includes but is not limited to copies of medical or dental bills, bids for home or car repairs, and collection notices.
  - d. If the applicant has a question concerning the amount of the request, please indicate to him or her that the amount of the request should match the amount on the bill, bid, or collection notice, etc. Although TRTF generally limits the awarding of grants to \$1000 or less, TRTF will consider applications in which the requested amount is more than \$1000.
  - e. Verify that contact information has been provided for the company, business, or vendor.
  - f. If the person completing the application is not the grant seeker, please verify that he or she has completed Section 2 of the application.
5. The following sections must be completed by the “A Helping Hand” Representative:
  - a. Local Unit Name: The name of the Local Unit.
  - b. Phone Number: The telephone number for the HH Representative processing the application.
  - c. Address: The address of the Local Unit, including city, state, and zip code.
  - d. “A Helping Hand” Representative Name: The name of the person who is processing the application. This should be the District President or Foundation Liaison or Local Unit President or Foundation Representative.
  - e. “A Helping Hand” Representative Signature: The signature of the person processing the application. The HH Representative signature indicates that to the best of his or her knowledge, the grant seeker has an emergency need. Please refer to the guidelines for what constitutes an emergency need.
  - f. Date: This is the date that the application is processed by the “A Helping Hand” Representative.
6. Once the application has been processed, submit the application and qualifying documentation to TRTF immediately. All applications should be treated with a sense of urgency and absolute confidentiality. Please scan and email, fax, or mail the application to TRTF immediately. If emailing or faxing, please forward all original documentation via postal mail after emailing and faxing.
  - a. Email scanned applications to: [help@trtf.org](mailto:help@trtf.org).
  - b. Fax applications to 512-476-1003 Attn: A Helping Hand.
  - c. Mail applications to: TRTF, Attn: A Helping Hand, 313 E. 12<sup>th</sup> St., Ste. 200, Austin, TX 78701.
7. If at any time you have questions about processing an application for “A Helping Hand,” please contact the Foundation office at (512) 476-1622 or (800) 880-1650 or send an email to [help@trtf.org](mailto:help@trtf.org).



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## **“A Helping Hand” Confidentiality Agreement**

I, \_\_\_\_\_, as a representative of Local Unit  
\_\_\_\_\_ and of the Texas Retired Teachers Foundation,  
hereby assure my professional approach to maintaining confidentiality throughout the award  
process for the “A Helping Hand” grant program. In the interest of respect and discretion, I will  
not reveal information about any grant seeker (and any individual applying on behalf of a grant  
seeker), including details provided in application responses, vendor information supplied in the  
qualifying documentation, or the fact that the grant seeker is applying for assistance, with  
anyone other than Texas Retired Teachers Foundation Board of Trustees, “A Helping Hand”  
committee members, Foundation staff, and TRTF legal counsel. With respect for grant seekers’  
privacy, I will not discuss the applicants’ information with any entities external of TRTF, except  
TRTF approved legal counsel and only at the request and discretion of TRTF trustees, staff,  
and/or “A Helping Hand” committee members.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



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## **“A Helping Hand” Application Materials**

- **Guidelines**
- **Application/Assistance Request**

***(Provide the following documents to grant seekers applying for “A Helping Hand”)***



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## “A Helping Hand” Assistance Program: Guidelines

### Who is eligible for assistance?

Any person who is receiving or is eligible to receive an annuity from the Teacher Retirement System of Texas (TRS) may apply for a TRTF grant through the “A Helping Hand” program. This includes retirees already receiving their TRS benefit and their beneficiaries, as well as anyone eligible for a TRS benefit who is not yet retired. Membership in the Texas Retired Teachers Association (TRTA) is not required. Any grant recipients who are not members of TRTA at the time a grant is awarded will receive a one-year membership to TRTA paid in full by TRTA upon grant approval.

### For what needs may a Grant Seeker request aid?

The grant seeker, or person in need of assistance, must demonstrate verifiable emergency need. Emergency need is defined as a short-term financial hardship caused by unexpected or extenuating circumstances such as natural disasters, illness, injury, accidents, or crisis that requires quick action. TRTF may, in its sole and absolute discretion, determine what is and is not considered an emergency need for the purposes of approving or denying a grant application through the “A Helping Hand” program. The emergency need must be verified with qualifying documentation (such as bills, bids, collection notices, or other documentation deemed acceptable by the TRTF Board demonstrating the financial cost incurred by the grant seeker).

#### Examples of emergency need include:

Food, rent, or utilities; emergency transportation and vehicle repair; medical/dental expenses; expenses related to home repairs or vandalism.

#### TRTF will not provide funds for:

Non-essentials; to finance vacation; to pay fines or legal expenses; to liquidate or consolidate debt; for purchase of home or home improvements for aesthetic purposes; to purchase, rent, or lease a vehicle; to cover bad checks or pay credit card bills

### How much aid can the grant seeker request?

TRTF will award grants in any amount up to \$1000 per grant application. Please indicate on the application form how much aid is needed and attach qualifying documentation to the request. Qualifying documentation includes but is not limited to copies of medical or dental bills, bids for home or car repairs, and collection notices. TRTF may, in its sole and absolute discretion, consider grant applications in which the requested amount exceeds the \$1000 limit. The decision to approve a grant application that exceeds \$1000 shall not in any way set a precedent or be used as a basis for the approval of any other grant application.

### How often may an applicant request aid?

Applicants may request aid as many times as they wish within a calendar year; however, the awarding of an initial grant in no way implies or guarantees that a subsequent grant application will be approved. TRTF reserves the right to deny any application that, in its sole and absolute discretion, does not meet the program guidelines or does not reflect or further the values of the Foundation as expressed in its mission, as interpreted by the Board of Trustees of the Foundation.



The Texas Retired Teachers Foundation
"A Helping Hand" Assistance Request

"A Helping Hand" assists public education retirees who require emergency assistance for a one-time special need or other short-term hardship. This form may be filled out by the grant seeker or a concerned citizen, friend, or family member of the grant seeker. Grant seekers are NOT required to be members of the Texas Retired Teachers Association, but must be eligible to receive benefits from the Teacher Retirement System (TRS) of Texas.

Complete Section 1 of the request and return to your Local Unit "A Helping Hand" Representative. For questions about your representative, please call 1-800-880-1650 or email help@trtf.org.

SECTION 1 To be completed by the Grant Seeker

Grant Seeker Name Phone Number

Current Address City State ZIP

Is grant seeker receiving or eligible to receive benefits from TRS? (Check one) YES NO

Monthly Income of Grant Seeker (including TRS pension, SS benefits, other) \$ (Please include a copy of your 1040 with your application)

Explain the nature of the emergency (If more space is needed, please attach an additional page).

Amount of Request \$ Vendor/Company Name (up to \$1000 in most circumstances; please see Guidelines for additional information)

Vendor/Company Phone Number

(Please attach all REQUIRED qualifying documentation)

SECTION 2 To be completed ONLY if Section 1 is completed by a friend or family member of the Grant Seeker

Name of Person Completing Application Phone Number:

Address City State ZIP

SECTION 3 To be completed by Local Unit "A Helping Hand" Representative

Local Unit Name Phone Number

Address City State ZIP

"A Helping Hand" Representative Name

"A Helping Hand" Representative Signature Date

SECTION 4 For Foundation office Use Only

TRTF Representative Signature Approved Denied Not Eligible More information required/decision pending

Date Received:

Date Processed:

Check Number:



# Texas Retired Teachers Foundation

313 E. 12<sup>th</sup> St., Ste. 220, Austin, TX 78701  
512.476.1622 ▪ 800-880-1650 ▪ help@trtf.org

## Foundation Donation Cards

TEXAS RETIRED TEACHERS FOUNDATION

I WANT TO  
**HELP!**

**DONATION CARD**  
DONATIONS ARE TAX DEDUCTIBLE

Please accept my gift  
 in memory or  in honor of:

\_\_\_\_\_

Please accept my donation of:  
 \$25    \$50    \$100    \$ \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_

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

PHONE \_\_\_\_\_

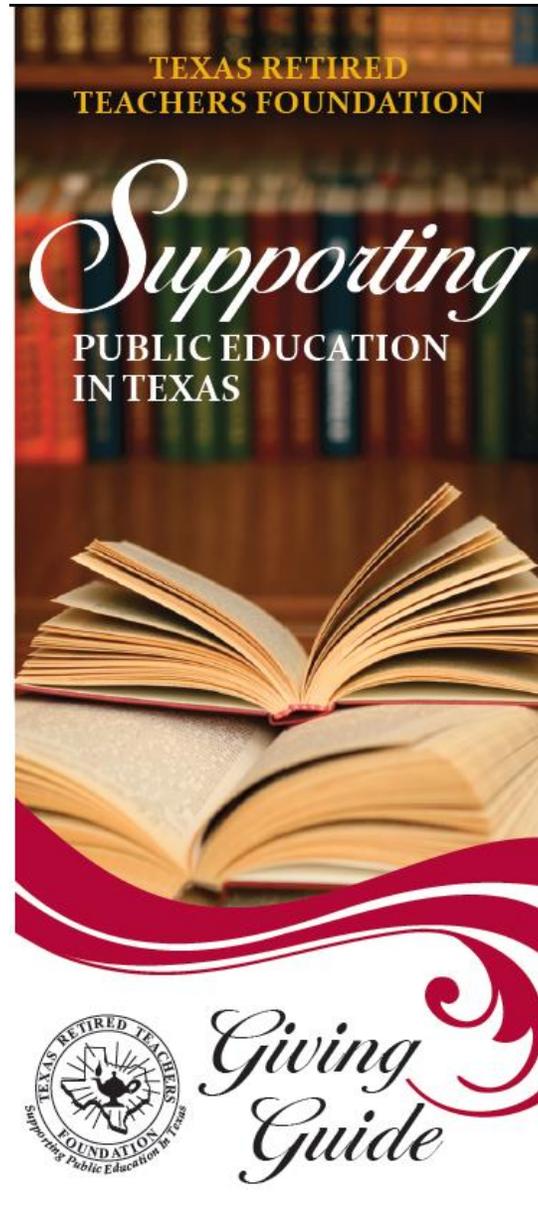
SAVE TRTF A STAMP AND EMAIL ACKNOWLEDGEMENT TO:  
Donations are tax deductible. Enclose a check, completed donation card and send to:  
Texas Retired Teachers Foundation • 313 E. 12th St., Ste. 200 • Austin, TX 78701-1957



# Texas Retired Teachers Foundation

313 E. 12<sup>th</sup> St., Ste. 220, Austin, TX 78701  
512.476.1622 ▪ 800-880-1650 ▪ help@trtf.org

## Foundation Brochures



Call 1.800.880.1650 to order

# CONTACT US

For additional information, please contact the Foundation office.

**Contact Person:**  
**Cindee Sharp**

**Phone:**  
**512.476.1622 or 1.800.880.1650**

**Email:**  
**help@trtf.org**  
**cindee@trta.org**

**Website:**  
**www.trtf.org**

**Address:**  
**Texas Retired Teachers Foundation**  
**313 E. 12<sup>th</sup> Street, Ste. 220**  
**Austin, TX 78701**

