

TRTA LEGISLATIVE NEWS

OUR MOMENT IS NOW:
TRTA MEMBERS ANSWER
THE CALL TO ACTION
Cover-5

Secretary/Treasurer Update 6

**Tribute to Executive Director
Emeritus Mike Lehr 7**

TRTA Convention News 8-9

TEXAS RETIRED TEACHERS FOUNDATION
Thank You For Donating! 15

TRTF to Host Fundraising Raffle,
Breakfast & Training Session
at TRTA Convention 16



The VOICE

THE OFFICIAL NEWS BULLETIN OF THE TEXAS RETIRED TEACHERS ASSOCIATION

OUR MOMENT IS NOW: TRTA MEMBERS ANSWER THE CALL TO ACTION

By Tim Lee
Executive Director

Over the last few months, the Texas Retired Teachers Association (TRTA) offered a series of articles about our state and federal legislative priorities. Since then, we have gone through the election cycle and have now transitioned from the political nature of campaigns to the reality of public policy. Elected officials now have the chance to act on the promises they may have made.

As a member, you know we have big challenges ahead this legislative cycle. Every elected legislative official has received a copy of our TRTA State Legislative Priorities. We have also communicated with our Texas congressional delegation about our desire to fix the Windfall Elimination Provision (WEP) and the Government Pension Offset (GPO).

Our elected leaders need your help. We must continue to educate them and drive our legislative agenda to success. TRTA's growing membership is our best resource to advance our priorities! Let's start by talking about our federal legislative action before providing insights on the 86th Texas Legislative Session.

What is happening with the WEP?

TRTA Executive Director Tim Lee made two trips to Washington, D.C. prior to 2019 while the previous Congress was still in session and met with Texas Congressman Kevin Brady (R-TX), who has authored bills in the past to modify the WEP and provide Social Security income for educators who paid into the system through their work either through the school district or through a job outside the district.

#RAISETHEBASE

Raising the base contributions to the TRS pension fund and TRS-Care are the best ways to ensure that retirees' needs are addressed while also ensuring long-term program sustainability.

CONTINUED ON NEXT PAGE

OUR MOMENT IS NOW: TRTA MEMBERS ANSWER THE CALL TO ACTION

In 2019, Congressman Brady will no longer be the Chairman of the U.S. House Ways and Means Committee. However, the co-author who worked on WEP modification bills with Brady in recent sessions, Congressman Richie Neal (D-Mass), is the new Chairman. TRTA will continue to make the WEP a priority and awaits the opportunity to work with Congressman Neal on this issue.

What about the GPO?

It has been a common belief in Congress that neither the WEP or GPO would be taken up and considered without a major overhaul of the Social Security (SS) program. Now, the view seems to be that dealing with the WEP, which may be the easier of the two issues to address, will help us build a coalition of national interest groups and supporters. This like-minded coalition would be able to help improve the WEP and then pivot to the much more difficult GPO issue.

TRTA believes it is far more likely that these issues will be dealt with individually instead of together simply because of their fiscal impact. We believe WEP will be considered before the GPO. A complete overhaul of Social Security may lead to WEP and GPO being dealt with in tandem; however, the other, and perhaps most dangerous issue TRTA monitors on the national level – the introduction of mandatory Social Security – could be part of that process. Addressing the WEP, which has more support and momentum, is the still the best way to help retirees and gain traction on other important Social Security reforms.

What can I do now?

TRTA is working with its national partners to get the WEP issue back on track after the partial government shutdown. We look forward to meeting with our national coalition partners and our friends in Washington, D.C. to get this measure moving forward. We will post action alerts via the *Inside Line* on the WEP and GPO as soon as we know more.

TRTA also suggests that members not be fooled by ideas that sound good but have no realistic support in Congress. TRTA leaders are familiar with some bills that have been filed to repeal the WEP and GPO completely. While TRTA believes full repeal would be the best outcome, these bills and similar proposals have been introduced regularly for more than two decades but have never received full consideration.

We understand these bills hold special appeal, but very few decision makers on Capitol Hill believe they will pass. In fact, TRTA leaders have met with many bill authors over the years and have been encouraged to seek a better solution than full repeal. After more than 30 years of retirees living with these unfair provisions, it is impractical to think Congress will agree on full repeal anytime soon. They do agree, though, that these provisions are unfair. Let's stay focused on solutions and get this done!

What, of all TRTA's legislative priorities this session, stands out?

TRTA legislative action this session can be summed up in the phrase **"Raise the Base!"** Raising the base contributions to the Teacher Retirement System (TRS) pension fund and TRS-Care health insurance program are the best ways to ensure that retirees' needs are addressed while also ensuring long-term program sustainability.

Retirees are in desperate need of a pension increase. That won't happen unless the Legislature raises the base contribution to the pension fund. Retirees in TRS-Care are contending with vastly increased medical costs, causing some retirees to ration their health care and others to seek re-employment. Some retirees are going without their medicine. TRS-Care can be improved, but it

will not happen unless the Legislature raises the base contribution.

In 2018, TRS lowered its rate of return assumption. This means TRS believes they will earn less interest on investments for the \$154 billion pension fund. Over the next 30 years, that is a huge reduction in revenue needed to pay for promised benefits. Some elected officials and think tanks want TRS to be changed to a defined contribution 401(k) style program. This change would ruin retirement security for future retirees and eliminate the chance for retirees to receive a raise in their lifetime. The only way to address this situation is for the Legislature to raise the base contribution to the pension fund.

"Raise the Base!" is TRTA's call to action. For all your social media posts, use **#RAISETHEBASE!**

How can I be an effective advocate for issues that impact retirees?

TRTA wants you to feel effective! We have more than hope, WE HAVE A PLAN! We have the ear of the Legislature. We know you are frustrated. We know you are hurting financially. This process works best when advocates work with elected leaders to get the job done.

You may not like your elected official. Work with them. You may not have voted for your elected official. Work with them. You may think your elected official is doing what needs to be done and you don't have a role. Trust me, you need to work with them!



OUR MOMENT IS NOW: TRTA MEMBERS ANSWER THE CALL TO ACTION

We have less than 140 days to solve these problems. Every advocacy group in the state is taking time to work with our elected officials, and we will lose out if we don't seize the moment. This is OUR time. We are one of the largest groups in the state. Let's use our advocacy power and experience!

Engage on social media, call, email or send handwritten letters to your Senator and Representative. Tell your story, then tell them what we want, what it gets us, and why. TRTA calls this The Ask, The Get, and the Rationale. These three facets help create clarity and provide a consistent message across the state. You can read more about The Ask, The Get, and The Rationale on pages 4-5.

Remember, always be professional and courteous when representing TRTA's issues and arguments.

- **GET ON SOCIAL MEDIA:**

Facebook, Twitter, and other forms of social media are a must. Ask legislators or staffers if they are using these sources of communication. If so, use them! It can be quick, efficient and effective! Remember to use the hashtag #RAISETHEBASE! Follow us on Facebook (www.facebook.com/TexasRetiredTeachers) and Twitter (twitter.com/TRTA).

- **HELP OUT LOCALLY:** The most important, effective advocacy effort occurs at the local level in the Representatives' and Senators' district offices. Many times, you will meet with a staffer when your legislator is not available. They are very helpful and can answer most of your questions. Treat them with courtesy and express your appreciation. To be effective with your legislator, good rapport with his or her staff is essential.

- **TELEPHONE CALLS & HANDWRITTEN LETTERS:**

During previous sessions, our calls completely overpowered the 800 number (888.674.3788) at the Capitol.

Voicemails were filled to capacity. This works! On the phone, be sure to identify yourself, speak to the issue and stay on message. Do not digress! Before closing, ask the person if he or she has any questions for you. If you do not know the answer, tell them that you will get that information back to them quickly. You can ask TRTA to follow up with them by sending a request to info@trta.org. Handwritten one-page letters are also very effective. Stay on message! Ask the legislator for their support. If you ask your legislator to vote for or against a bill, defend your position.

- **EMAIL:** Emails have become an effective way to communicate with a legislator's office staff. Stay on message, write to the issue and ask for the legislator's support. You usually get a response within four days. **ACTION ALERTS**, sent via the *Inside Line*, are an efficient and quick way to respond. Sign up for this free service at www.trta.org/the-inside-line.
- The clock is ticking. We need every one of you on our action team. Get involved. Come to the TRTA Day at the Capitol on April 3. Go to a local unit meeting. Take action!

Why should I contact my state legislators when TRTA has an office in Austin?

TRTA and its Austin team can handle the complicated discussions about contribution rates, rates of return, and actuarial soundness, but we are not YOU. Your story is what resonates most with a legislator and prompts them to take action or vote favorably on the items on TRTA's list of priorities. So please call, email or send a handwritten letter to your legislator today and tell them how you are being affected by never receiving a cost-of-living increase or by the rise in the cost of your medical insurance.

Many times, it can be difficult to bring clarity to a political issue if there is no name, face, or voice to go with the

budget line item. Your calls, letters, and emails make issues impacting retired educators real. You are more than a number and a dollar sign. Your story—how you may be struggling to make ends meet on an income that hasn't changed in fifteen years and as inflation continues to rise—is the key.

How important are our issues to the Legislature?

Retired educator issues are very important to many elected officials. Have you ever thought about how many elected officials have family members who work in public education? Very few legislators do not have a personal connection to public education and to TRS.

Let's also consider that of the thousands of issues faced by our Senators and Representatives, those impacting public education retirees in Texas have been at the forefront for the past four sessions. It is very rare to have the priorities of one group of constituents be on the "must-do" list as consistently as ours have been for nearly a decade.

Legislative solutions to funding issues, like those with TRS-Care, often go through multiple iterations during a legislative session. What is proposed at the beginning of a session is often far different than what is enacted into law. TRTA's Austin legislative team is part of several negotiations throughout session to increase funding for a specific need, such as raising the base funding for the pension fund. Because of the fast pace of Texas' legislative session, changes can be made to bills on a daily basis.

To be blunt, our issues can consume large sums of budget dollars. While TRTA believes these additional requests are appropriate and needed, getting the Legislature to agree on these items is very challenging.

CONTINUED ON PAGE 4

OUR MOMENT IS NOW: TRTA MEMBERS ANSWER THE CALL TO ACTION

Why doesn't the Legislature just give public education retirees a raise?

Texas statute prohibits increases to current TRS retirees unless the cost, or additional liability, of that increase can be absorbed into the current pension obligations. That cost cannot allow the TRS unfunded liability to exceed 31 years.

Think of it this way: the TRS pension fund is valued at more than \$154 billion. That covers every current retiree, but TRS must also plan for future retirees. Right now, the fund does not have enough money to cover pension obligations for all newly hired or early career educators. We call that the unfunded liability.

TRS and legislators know that newly hired and early career educators will not retire tomorrow, so there is time to collect contributions, manage investments and earn the additional revenue needed to pay the cost of benefits in the future. Still, Texas has a law that says TRS needs to manage these unfunded liabilities within 31 years or less. If the pension system cannot predict their unfunded liabilities will be amortized within that 31-year period, the system cannot take on any new debt or pension obligations.

Because raises for retirees are considered new liability, the system must be healthy or sound enough to cover that increased cost within the 31-year period. If TRS has a funding period longer than 31 years, the Legislature is prohibited from providing an increase to retirees.

As of January 2019, the funding period for TRS pension fund is 86 years, well outside the ability of TRS to pay retirees an increase. There are ways to fix this so that something can be done for retirees. The Legislature must "Raise the Base!"



Where can I learn more about TRS bills that have been filed so far and how can I track their progress?

You can track bills by visiting www.capitol.texas.gov and entering a bill number or keyword (such as TRS or TRS-Care) in the Search Legislation column. You can also use the MyTLO tab to set up alerts for bills you would like to track through the entire process. Visit TRTA's website (www.trta.org) to see currently filed bills.

You can also follow committee activity on bills on the Capitol website. TRTA sends out *Inside Line* articles when important legislation is being considered in committees. The most important committees that TRTA and its members should pay attention to are: House Appropriations (and Article III Subcommittee); Senate Finance (and Article III Subcommittee); Senate State Affairs; and House Pensions, Investments, and Financial Services.

Three Parts for Every Priority: The Ask, The Get, The Rationale

1. **What We Want:** Increase the state contribution for the pension fund from 6.8% to 8.6%.

What it Gets Us: A sound retirement system able to provide much-needed benefit increases for current retirees and a guaranteed retirement income for all current and future retirees

Why:

- The state contribution rate was 8.5% in the 1983, but the Legislature has funded significantly less since then.
- Even at 8.6%, the contribution rate is one of the lowest in the nation for non-Social Security (SS) covered employees.
- 95% of the public school employees in Texas are not covered by Social Security. Taxpayers save \$1.6 billion a year by not paying the 6.2% into Social Security. Employees also save \$1.6 billion each year.
- If you want to compare TRS to the private sector, you may be in for a surprise. Factoring in SS and pensions, the private sector on average pays 10.1% of payroll. The private sector pays far more, gets much less, and is incredibly inefficient in providing retirement security to employees. If educators received, at minimum, the average of what the private sector pays toward retirement, TRS would be actuarially sound and would be able to provide a pension increase to current retirees.
- Funding \$840 million a year saves billions in future costs, as assets are invested and earnings replace future tax dollars.
- The TRS Pension Benefit Design Study verifies that the current defined benefit plan is the most efficient and effective way to provide retirement benefits for educators.

OUR MOMENT IS NOW: TRTA MEMBERS ANSWER THE CALL TO ACTION

2. What We Want: Provide a benefit increase for all retirees who retired before 9/1/2018.

What it Gets Us: A much-needed boost to the income of retirees living on tight, fixed incomes.

Why:

- Since 2001, only one partial 3% cost-of-living adjustment was provided. It was capped at \$100 per month and was only for members who retired before 9/1/2004.
- Only one 13th check has been provided since 2001 (paid in January 2008), and it was capped at \$2,400.
- 30% of TRS retirees (130,000) receive \$1,000 per month or less.
- Social Security recipients have received cost-of-living adjustments in most years over the past 18 years.
- The average TRS life annuity is \$2,078 per month and is the main source of income for most retirees, as 95% of public school employees are not covered by Social Security.

3. What We Want: Increase the state TRS-Care contribution from 1.25% to 2.25%.

What it Gets Us: Increased base funding for the health care plan, enabling more sustainability and preventing future funding shortfalls that may fall on the backs of retired educators.

Why:

- The base funding needs to be increased to make the program sustainable. In 2017, base funding was increased by .45%; but an additional 1% is needed to make the program affordable for several years.
- In 2018, retirees paid almost \$500 million in premiums and several hundred million in out-of-pocket expenses.
- Funding per retired educator is significantly less than funding per retired state employee.
- Retired educator premiums are significantly higher than the zero premiums paid for retired state employees.
- In 2018, the average total cost per retired participant paid by TRS was \$1,300 less than what ERS paid on average for its retired participants.

4. What We Want: Allow Medicare-eligible retirees who opted out of TRS-Care a one-time opportunity to rejoin TRS-Care.

What it Gets Us: A short-term opportunity for retirees who made the mistake of leaving the program to receive access to adequate health care coverage.

Why: This would provide a safety net for retirees who were confused by their options when the TRS-Care program drastically changed without adequate explanation of their choices and the consequences.

5. What We Want: In the event that no cost-of-living increase is provided for retirees, reinstate the rider to prevent TRS-Care premiums from increasing.

What it Gets Us: The confidence in knowing that retirees' incomes will not be negatively impacted by increased health insurance costs when there is no hope of a COLA.

Why: As previously noted, retirees have had almost no pension increases over the past 18 years. Due to the premium increases in 2017, most retirees are struggling to make ends meet.

6. What We Want: Allow all members who retired before 9/1/2018 to return to work without penalty.

What it Gets Us: Enables retirees struggling to make ends meet to return to the classroom.

Why: Given the significant shifts in costs for retiree healthcare, more retirees will need to return to work to survive. This will give them more options to pay for their higher healthcare costs.

7. What We Want: Amend the statutes to allow TRS discretion in dealing with minor return-to-work violations.

What it Gets Us: Reasonable solutions that do not adversely impact a retirees' modest income.

Why: The current laws and rules are very complicated and difficult to navigate. Repayment of a full month's annuity for a minor violation does not seem appropriate.

While this is not the full list of TRTA's priorities, it emphasizes several of the most important ones. To read the full list and rationale, please visit www.trta.org/our-issues. 🌟

★ SECRETARY/TREASURER UPDATE

By Ella Gauthier, 2018-2020 TRTA Secretary/Treasurer



The role of the treasurer has changed over the last two years. Responsibilities of both local unit and district treasurers have expanded, requiring additional paperwork to be submitted to TRTA. Thank you to the local unit and district treasurers who have completed the necessary paperwork to be included under the TRTA Employee Identification Number (EIN). This includes the TRTA Tax Reporting Activity Forms (TR-1 and TR-2) and setting up your bank cards. For any treasurer struggling with completing these important tasks, help is available from Rosalind Johnson at TRTA. Your Finance Committee members Ella Gauthier, Ron Leiman, Carol Pilgrim, Dale Thomas and Laura Whitson can also help.

Planning ahead will make completing the August 1, 2019 report for the TRTA Deputy Director easier. This includes reconciling bank statements and having them dated a second time by a non-check signer. Have a filing system where all necessary documents are easy to access for the annual audit and developing the budget.

The deadline for reporting scholarship information was February 15. If you have not done so already, local unit treasurers please report the information to your district treasurer. This information is due to state secretary/treasurer from the district by March 1. Also, publicizing this information in local newspapers will give visibility to local units and help increase membership. Publicize, publicize, publicize!

Secretaries are vital to local units and districts. Secretaries are encouraged to work closely with the public relations committee to publicize the activities and projects of their local unit and districts. It is important that retired educators and legislators are aware of TRTA and our many accomplishments. This being a legislative year, it is important that TRTA is visible!

Let us continue to "Connect the Dots to TRTA's Success" by working together and being a visible presence in our communities!



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Former TRTA Executive Director Mike Lehr Passes Away

The Texas Retired Teachers Association's former Executive Director, Mike Lehr, passed away on Thursday, January 18, 2019. Lehr was 89 years old. He lived in San Angelo, Texas with his wife Francine.



Mike Lehr served as TRTA's Executive Director from 1994 to 2003. Lehr spearheaded the development and lobbying of the Consumer Price Index (CPI) Catch-Up Plan, which provided benefit increases for retired public educators for four consecutive legislative sessions. In 1995, the Texas Legislature approved a \$1.6 billion increase for Teacher Retirement System of Texas (TRS) annuitants.

After working for 38 years in public education, Lehr retired and became a TRTA member. Less than a year after starting his position on the Legislative Committee, Lehr became the chair of the committee, and worked to solve the problem of retired educators receiving poverty-level annuity checks.

Lehr worked with his legislative committee and TRS to develop the CPI Catch-Up, which proposed to dramatically increase the annuity payments owed to retired educators. Lehr used his previous work experience with the Austin Independent School District and the Texas Legislature to convince the Speaker of the House, Gib Lewis, and the Lieutenant Governor, Bob Bullock, to support the plan.

In 1994, Lehr was promoted to TRTA Executive Director. La Vonne Rogers, who worked as the officer manager for TRTA during Lehr's tenure as Executive Director, considers the CPI Catch-Up Plan a miracle.

"People who had retired many years ago were living on practically nothing," Rogers said. "All of a sudden the fund was fully funded, and we had lots of cooperation from the Legislature, because the people that were working with Mike wanted to see it happen."

Lehr also was at the forefront of securing the land that TRTA's state office sits upon. The decision to purchase the land proved to be a great investment as it stands less than 300 feet from the Texas Capitol.

Lehr stepped down as TRTA's Executive Director in 2003, and Tim Lee soon after filled the association's vital role. Lehr began his tenure as a board trustee of the Texas Retired Teachers Foundation (TRTF) in 2001, and he received the E.L. Galyean Service Award, TRTA's highest honor, in 2002. Lehr's work with TRTF concluded in 2016. He was a fixture among the TRTA family, and his contributions towards the retired educator community were deeply impactful. 📌

In lieu of flowers, his family has asked that donations be made to TRTF in Lehr's name to the Lehr-Pritchard Endowment Fund. Donations may be mailed to: TRTF, Attn: Endowment, 313 E. 12th Street Suite 220, Austin, TX 78701 or made online at www.trtf.org/donate.

66th Annual TRTA Convention: *Connecting the Dots to TRTA's Success!*



Registration is now open for the 66th Annual TRTA Convention to be held in Austin, Texas April 1-2, 2019! This year's theme is Connecting the Dots to TRTA's Success, a meaningful metaphor that matches TRTA's legislative goals as we head into another challenging session in the Texas capital city!

The convention will be held at the Austin Hilton on 500 E. 4th Street. The hotel is now sold out with no plans to designate an overflow hotel.

There is no better time to be in Austin! The Texas Legislature will be in regular session, discussing such vital issues as the TRS-Care health insurance program and ways to protect the longevity of benefits for our public education retirees and pre-retirees.

Please see the schedule of events to help you plan your travel. Convention activities will begin later in the day on Monday, April 1, allowing members to travel in the morning and still arrive in time for registration. To accommodate those attendees with hearing disabilities, there will be a limited number of standard ADA headsets available at registration on a first-come first-served basis.

Unlike years past, there will be no banquet, and instead members may attend a welcome dinner on the first night. The menu for the evening includes a salad with dried cranberries,

goat cheese and a champagne dressing, assorted warm rolls with butter, southern braised beef, creamy mashed potatoes, buttered broccoli and baby carrots. Members will enjoy cheesecake with a raspberry coulis for dessert.

Day two (April 2) begins with a Foundation Breakfast. Your early morning meal includes scrambled eggs, potatoes, bacon and an assortment of beverages, pastries and breads. Attendees will be able to present gifts to the Foundation in honor or in memory of a loved one, friend or colleague. This year, TRTF is also hosting a fundraising raffle. TRTA's 20 districts will donate unique, valuable items and convention attendees may purchase tickets on day one (April 1) of the convention. Tickets are \$5 each or five for \$20. Read more about the raffle on page 16.

Training and information sessions and the House of Delegates fill the second day. This year's sessions include "Making a Digital Memory Book," "Benefits of Owning a Pet," "The Texas Silver Haired Legislature," officer and committee training sessions, and more! A legislative luncheon will be held at 12:15 p.m. The menu includes a grilled chicken caesar salad and assorted warm rolls with butter. Dessert will be a flourless chocolate cake with raspberry coulis and topped with whipped cream.

CONTINUED ON PAGE 9

66TH ANNUAL TRTA CONVENTION SCHEDULE: MONDAY, APRIL 1, 2019

10:00 a.m. TRTA Officers Meeting	10:00 a.m. – 6:00 p.m. Registration/Delegate Certification/Exhibits	11:00 a.m. – 12:00 p.m. Foundation Board of Trustees Meeting	1:00 – 2:00 p.m. TRTA Board of Directors Meeting
3:45 – 4:30 p.m. District Presidents Meeting	4:45 – 5:45 p.m. District Caucus Meetings	6:30 – 8:30 p.m. Welcome and Awards Dinner	

66TH ANNUAL TRTA CONVENTION SCHEDULE: TUESDAY, APRIL 2, 2019

7:00 – 8:15 a.m. Foundation Breakfast	7:30 – 8:00 a.m. Facilitators Meeting	8:00 a.m. – 12:00 p.m. Registration/Delegate Certification/Exhibits	8:30 – 9:15 a.m. Breakout – Session 1	9:45 – 10:30 a.m. Breakout – Session 2
11:00 – 11:45 a.m. Breakout – Session 3	12:15 – 1:30 p.m. Legislative Luncheon	2:00 p.m. – TBD House of Delegates	TBD TRTA Board of Directors Meeting	

66th Annual TRTA Convention Continued From Page 8.

At the conclusion of the House of Delegates, attendees will be able to choose from a wide variety of restaurants within walking distance of the hotel in wonderfully diverse downtown Austin for dinner.

The convention will be truncated, allowing for a full day of legislative grassroots advocacy on Wednesday, April 3! "Day at the Capitol" is open to all convention attendees and any member who wants to come to Austin for this purpose only.

The Day at the Capitol allows public education retirees to visit with their legislators, be honored by both the Texas Senate and House and enjoy a rousing speech by TRTA officers and elected officials on the Capitol grounds. Attendees will also enjoy an ice cream social on the east lawn in the afternoon. All attendees at this event are encouraged to wear red!

Please note, an RSVP is required for the Day at the Capitol event even if you do not plan to attend the Convention. Your RSVP ensures that enough advocacy materials and refreshments are available for all attendees. Please check the appropriate box on the registration form if you are attending on April 3 or send an email to info@trta.org with the subject line Rally Day.

Look for the registration form for all events, including meal prices, on page 10. Online convention registration is available now on the TRTA website (www.trta.org). Registration for the Convention and Day at the Capitol closes March 1, 2019. We hope you will join us in Austin in for convention, Day at the Capitol, or both and help us connect the dots to TRTA's success! ★

Join us for Day at the Capitol

WEDNESDAY
APRIL 3, 2019

8:00 - 9:00 a.m. Legislative Visits
9:30 a.m. House Gallery
10:00 a.m. - 2:00 p.m. Photo opportunities with legislators
10:30 a.m. Senate Gallery
11:30 a.m. Rally on the Capitol Steps or East Lawn (TBD)
12:00 p.m. Additional Legislative Visits
12:30 - 2:30 p.m. Ice Cream Social on the East Lawn



A Letter from TRTA Past Presidents

Recently, several of TRTA's past state presidents met to discuss bylaws amendments for the upcoming 66th Annual Convention. Of great interest to the past presidents was proposed amendment one, which would have the state association host a convention in even-numbered years only, while hosting a rally day (known as TRTA Day at the Capitol) in every odd-numbered year, which is when the Texas Legislature is in session.

The amendment, which is receiving a recommendation of approval by the TRTA Board of Directors, provides opportunities for members of TRTA to gather and do the important business of the association in even-numbered years and to promote the legislative priorities and encourage association-wide participation with legislators in Austin during odd-numbered years.

After considerable discussion of this amendment, TRTA's past presidents recognize the need for the state association to remain focused on legislative activities in odd-numbered years so that all staff and TRTA members' attention can be directed towards securing better retirement benefits for Texas public education retirees. The past presidents have confidence that the association can conduct all other important miscellaneous business required to operate during even-numbered years.

TRTA's past presidents have provided the following official statement: The following TRTA Past Presidents have agreed to fully support proposed amendment one (1), which changes the TRTA bylaws so that the TRTA convention will be held in every even-numbered year only and a Day at the Capitol event will be held in every odd-numbered year during the regular legislative session.

Nancy Byler (Immediate Past President), Fran Plemmons, Maridell Fryar, Herbert Norris, Dora H. Scott-Nichols, Aubrey Cherry, Tom Pritchard and Myrtice Larson

NEW YEAR, NEW WAY TO ACCESS YOUR MEMBERSHIP CARD

As you may be aware, TRTA is no longer mailing membership cards due to increased costs in printing and postage. So that dues revenue may be used more efficiently, your membership card is now available online whenever you may need it! This exciting new feature is available at your fingertips and can be accessed 24/7 from your member profile on the TRTA website. You can also update your mailing address or phone number, renew your dues, and see all of the benefits available to TRTA members from your profile.

Current and Diamond Plus members can follow these easy steps to save or print a membership card:

1. Visit www.trta.org and select "Member Login" at the top right.
2. Log in to your account. Your username is your member ID number and the default password is `trta123` (all lowercase, no spaces).
3. Select "Print Your Member Card" to print or save your card as a digital file.

No computer? No problem! A member ID card is also available on every issue of TRTA's quarterly news bulletin, *The VOICE*, on the back page. Simply cut out the address label which contains your membership status and ID for a quick and easy card on-the-go.



If you have not yet renewed your membership, you can follow the same steps above to renew your dues and print your membership card right away. Please direct any questions concerning your account login or member benefits to membership@trta.org.

TRTA is Pleased to Welcome Staff Members to the Team

Madeleine Watts, Membership Assistant, grew up in the Dallas area and attended the University of Texas at San Antonio where she earned a BBA in Marketing. Before joining TRTA, she worked in various customer service management and training roles and as a marketing manager for a family-owned business in Austin. Madeleine spends her spare time with her fiancé and dog, and enjoys making pasta from scratch, hunting down vinyl treasures and trying new restaurants. As part of the TRTA family for over a year, Madeleine performs a multitude of tasks such as processing membership enrollments and renewals. She also supports local unit chairs by serving as the staff liaison for the state Healthy Living Committee.



Madeleine Watts and Sarah Richardson

Sarah Richardson, Administrative Assistant, is originally from Austin and attended Stephen F. Austin State University in Nacogdoches where she majored in English and History. For the past seven years, she taught Pre-K and thoroughly enjoyed working with children. In her free time, she enjoys working out by either dancing in Body Jam at the gym or running. She also enjoys baking and watching football with her husband, Nathan. Sarah fulfills multiple roles at TRTA, including receptionist duties, helping with membership processing and administering the "A Helping Hand" program for the Texas Retired Teachers Foundation. 📧

PROPOSED AMENDMENTS TO THE TRTA BYLAWS

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

PROPOSED AMENDMENT 1

If adopted, TRTA would have an even-numbered year convention and an odd-numbered year Day at the Capitol event.

ARTICLE VI: HOUSE OF DELEGATES, CONVENTION AND DAY AT THE CAPITOL

Section 1

The voting body of TRTA, which shall be known as the House of Delegates, shall consist of:

1. Members of the Board of Directors;
2. Chairs of the TRTA Standing Committees;
3. District Presidents, First Vice–Presidents, Second Vice–Presidents, Secretaries and Treasurers or alternates appointed by the District Presidents when the elected officers cannot attend;
4. In even-numbered years, Local Unit delegates, determined as follows:
 - a) Two (2) delegates for the first 100 TRTA members in a Unit or fraction thereof; and
 - b) One (1) delegate for each additional 100 TRTA members in a Unit or fraction thereof; and
5. Past Presidents of TRTA.

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 (in even-numbered years),
2. Receiving reports,
3. Amending bylaws,
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.

Section 3

The Board of Directors shall determine the time and place of the TRTA Day at the Capitol in odd-numbered years during the Texas Legislative Session for the purpose of:

1. Advocating for improved benefits for all Texas public education retirees;
2. Supporting legislation filed during the legislative session that will protect and improve benefits for Texas public education retirees;
3. Providing an opportunity for all TRTA members and members of the community who support Texas retired educators to meet with their legislators and to be recognized by the Senate and the House; and
4. Providing opportunities for social interaction with other TRTA members present.

ARTICLE VIII: NOMINATIONS, ELECTIONS, AND INSTALLATION

Section 2

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.

ARTICLE IX: BOARD OF DIRECTORS

Section 2

The TRTA Board of Directors shall:

1. Conduct TRTA business between ~~annual~~ Conventions, subject to the 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 bylaws.

PROPOSED AMENDMENTS TO THE TRTA 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 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 3

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

ARTICLE XIII: PARLIAMENTARY AUTHORITY

Section 2

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

ARTICLE XV: AMENDMENT OF BYLAWS

Section 3

The Board of Directors shall submit to the House of Delegates all proposals to amend the TRTA 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 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.
3. All amendments shall become effective July 1 following the ~~annual~~ state convention unless otherwise stated as a proviso with the proposed amendment.

Maker: Organizational Affairs Committee

OAC Recommends: Approval

OAC Rationale: Convention and the Day at the Capitol will be two separate events.

Because of the growing costs of an annual convention and the difficulty of finding venues which can accommodate the size of TRTA conventions, having convention on the even numbered years would reduce the cost drastically. All organizational business can be conducted in the even years and members would still have the opportunity to enjoy fellowship. In the odd-numbered years, members would enjoy working together and focusing on our legislative issues. The Day at the Capitol event would be at a lower cost to the organization as well as to individual participants. This proposal is based over a 2-year cycle correlated to the TRTA officers' terms. If adopted, this would go into effect in 2020.

BOD Recommends: Approval

BOD Rationale: The TRTA Board of Directors recommends approval and agrees with the rationale of the OAC with the addition of the following: Planning for the TRTA annual convention is intense and time-consuming for the TRTA staff. This change will allow staff to serve the various other needs of our members while providing more time to plan TRTA events that are engaging, productive, and well-executed.

PROPOSED AMENDMENT 2

If adopted, Nominating will be struck through the committee list and the word "and" will be inserted before Finance.

ARTICLE X: EXECUTIVE COMMITTEE

Section 2

The Executive Committee shall, in the interim between meetings of the Board of Directors:

1. Exercise all powers of the Board, provided that nothing shall be done contrary to the policies adopted by the Board of Directors or to any action of the Board of Directors; and
2. Confirm the President's appointments of the Historian, the Legislative Coordinator, the Organizational Affairs Coordinator, and the chairs of all standing committees and special committees except the chairs of the following committees: Membership, Public Relations, and Finance, ~~and Nominating~~.

PROPOSED AMENDMENTS TO THE TRTA BYLAWS

Maker: Organizational Affairs Committee

OAC Recommends: Approval

OAC Rationale: Change the wording to reflect the vote approved by the House of Delegates to eliminate the Nominating Committee in April 2018.

BOD Recommends: Approval

BOD Rationale: The TRTA Board of Directors recommends approval and accepts the rationale of the OAC.

PROPOSED AMENDMENT 3

If adopted, annual dues of active and associate members will be \$36 with a \$3 rebate to the local unit. Annual dues of support personnel including cafeteria workers, custodians, instructional aids will be \$12 with no rebate to local units.

ARTICLE IV: MEMBERS

Section 4

Annual dues of both Active Members and Associate Members shall be ~~thirty-five dollars (\$35.00)~~ thirty-six dollars (\$36.00), three dollars (\$3.00) of which shall be rebated to the respective TRTA ~~District~~ Local Unit. Annual dues of support personnel including cafeteria workers, custodians, instructional aids will be \$12 with no rebate to local units.

Maker: Stephens County Retired School Personnel

Contact Individual: Karen Donnell

Maker's Rationale: We have no support personnel members because the dues are too high for them. The financial impact of this change would be positive. Some money as opposed to none from these people. Also, since the number of members to our state organization is so important, this would surely increase our membership state wide.

OAC Recommends: Opposition

OAC Rationale: 1. Neither TRS nor TRTA distinguishes between support personnel and others. School districts define support personnel differently. Librarians, nurses, counselors, bus drivers, and cafeteria workers may be considered support personnel in some districts and not in others. Some support personnel are, in fact, degreed and/or certified or may not be members of TRS.

1a. Even if we can define support personnel, TRTA cannot require TRS to write a new program to distinguish different dues levels.

2. This reduction in dues will result in a loss of revenue for TRTA and districts. The number of support personnel members TRTA may gain will not equal the revenue TRTA would lose if members change their status and thus, their dues.

3. This amendment would change the dues rebate from the districts to the local units, thereby eliminating the budget for many districts.

BOD Recommends: Opposition

BOD Rationale: The TRTA Board of Directors recommends approval and accepts the rationale of the OAC.

OUTLOOK



LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

THANK YOU FOR DONATING!

Supporting TRTF's Charitable Programs

15

TRTF RAFFLE, BREAKFAST & TRAINING SESSION AT TRTA CONVENTION

16

DONATE TODAY!

Donation card on the back of *The VOICE*

16



THANK YOU FOR DONATING!

The Texas Retired Teachers Foundation (TRTF) believes that education and educators impact the future every day! The Foundation is able to do just that, thanks to the overwhelming generosity of the members of the Texas Retired Teachers Association (TRTA).

Your donation means a retiree in need can receive help to get back on their feet or a classroom teacher can fund a unique project or learning platform for their students.

Our members change lives by supporting TRTF's programs "A Helping Hand," Classroom Assistance Grants and Beginning Teacher Scholarships. Since 2008, the donations of our members have enabled TRTF to give more than \$486,000 to educators of the past, present and future!

November 2018 was Foundation Month, a time designated by the TRTA Board of Directors to honor the Foundation through local unit programs and an annual appeal. In the third quarter issue of *The VOICE*, TRTA generously allowed TRTF to use several pages to promote its annual request for donations.

TRTA members have donated more than \$105,000 to the Foundation's programs since November 1!

If you want to donate to a valuable cause that has a direct impact on education in Texas, please consider making a tax-deductible donation to TRTF. You may use the form found on the back of *The VOICE* or pay by phone using a credit card (call 1.800.880.1650 and ask for Sarah). You may donate online at www.trtf.org/donate.

Thank you for reaching into your hearts and sharing your donations to help your fellow retirees and active teachers.



The VOICE

Send address changes to:
Texas Retired Teachers Association
313 E. 12th Street, Suite 200 | Austin, TX 78701-1957
1.800.880.1650 | www.trta.org

TRTF TO HOST FUNDRAISING RAFFLE, BREAKFAST, & TRAINING SESSION AT CONVENTION

The Texas Retired Teachers Foundation (TRTF) looks forward to the upcoming 66th Annual TRTA Convention in Austin, being held April 1-2, 2019.

We hope you will stop by the Foundation exhibit booth on Monday, April 1, where you can buy raffle tickets to win one of twenty prize baskets valued at \$200 being donated by TRTA's twenty districts! Each basket will be unique and representative of the district's region. Tickets will be just \$5 each, or you may purchase five tickets for \$20. Be sure to stop by and purchase your tickets on Monday between 10:00 a.m. and 6:00 p.m., because names of the winners will be drawn and prizes given out Tuesday morning. All proceeds from raffle ticket sales benefit the Foundation's charitable programs.

TRTF will host a breakfast on Tuesday, April 2 at 7:00 a.m. The menu features orange juice, coffee, and hot tea to drink, as well as muffins and croissants, scrambled eggs, potatoes and bacon. Tickets are \$35 per person and may be purchased when you submit your convention registration form (see page 10).

Our 30 Classroom Assistance Grant and 21 Beginning Teacher Scholarship recipients will be announced during the breakfast. The Foundation will also provide an update for members about the Lehr-Pritchard Endowment Fund.

It is common for individuals, districts and local units to present gifts to the Foundation in honor or in memory of someone at the end of the meal. If you are attending the breakfast and would like to make a donation, you may complete a form to include a personal message. Forms will be available on your table or in *The Ledger*, our monthly e-newsletter, and on the TRTF website (www.trtf.org).

TRTF will host a training session on April 2 at 9:45 a.m. in room 414. It is recommended that Local Unit Foundation Representatives and District Foundation Liaisons join the session. Understanding the roles of liaisons and representatives, fundraising and program implementation will be discussed. See you there!

TEXAS RETIRED TEACHERS FOUNDATION

OUTLOOK

LEADING POSITIVE CHANGE FOR TEXAS EDUCATION

TEXAS RETIRED TEACHERS FOUNDATION



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