



TEXAS RETIRED TEACHERS ASSOCIATION

TRTA: The Voice For All Public Education Retirees

RETIREMENT EDUCATION COMMITTEE CHAIR

RESOURCE GUIDE 2020-2022

Forms in this guide are available online at www.trta.org/retirementeducation



Retirement Education

Retirement Education events and activities help identify and recruit potential NEW members by providing the most current retirement information to all active school personnel and retirees in your community.

Keys to Success with Retirement Education

- Every superintendent matters. Encourage collaboration with all school administrators and participate in district-wide meetings for active personnel.
- Expand your outreach by adopting local schools or by including smaller school districts in programs.
- Always have flyers, cards, TRTA materials and local enrollment forms handy. Recycle copies of ***The Voice*** to share in campus teacher's lounges.
- Inform active school personnel of scheduled dates for TRS retirement meetings.
- Distribute TRTA information at all retirement events and publicize the availability of the ***Inside Line*** for retirees and active school personnel.

Boost the Success of Events and Activities with Help from TRTA

Use the **Retirement Education Information Request** to:

- Promote your retirement education event on the TRTA website calendar.
- Use the RSVP contact support or your local/district email to register attendees and, most importantly, to follow up after the event.
- Receive retirement education materials from the TRTA office to gather additional information about your potential new members.

All Resources for Success are Available Online

Visit www.trta.org/retirementeducation for printable materials:

- **Retirement Education Resource Guide**
- **Retirement Education Information Request**
- **3 Steps To Plan Your Future** Brochure
- Activity - **Retirement Education Facts Sheet** for ***3 Steps To Plan Your Future***
- Answers - **Retirement Education Facts Sheet** for ***3 Steps To Plan Your Future***
- PowerPoint - **Retirement Education Facts** for ***3 Steps To Plan Your Future***



Local Unit Planning Calendar

Before School Starts

- Local President meets with team to develop a plan and budget for retirement events. (Descriptions of different types of events & worksheets for planning provided in Retirement Education Resource Guide.)
- Retirement Event Contact person/s named to coordinate plans.
- Contact Superintendents and Principals for permission and dates to present information at events, staff meetings, and campus visits. Secure an email address in each ISD for distribution of information.
- Submit the **Retirement Education Information Request** (included in the Retirement Education Resource Guide) to the TRTA office. Event information will be listed under the Calendar tab on the home page. TRTA will also help establish an RSVP system for all of your activities and events.
- Utilize the resources located on the Retirement Education Committee web page for distribution of handouts and presentation materials at all retirement education activities and events.

Throughout the Year

- Conduct retirement activities and events in months as planned. Fall is a great time for school personnel retiring mid-year and Spring is good for those retiring at the end of the school year.
- Visit campuses when possible to deliver current information on retirement issues and share accomplishments or current retirement information at local meetings.
- Confirm that the **Retirement Education Information Request** (included in the Retirement Education Resource Guide) was received by the TRTA office and that event information is listed.
- Use an RSVP email to register attendees before the event and to stay in contact with after the event for future retirement events and TRTA membership upon retirement.
- After the event, return a copy of the attendance list and the Event Feedback forms (included in the Retirement Education Resource Guide) to the TRTA office.

Before School Ends

- Send a Thank You email to all of your event attendees and request an update to any changes in their contact information or email addresses for the next year.
- Meet with your team to evaluate the results of this year's plan and prepare for next year. Enlist help especially from newly retired members.

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The following documents and forms are available at www.trta.org/retirementeducation.

- Retirement Education Information Request
- *3 Steps To Plan Your Future* Brochure and Activity Sheets/PowerPoint
- Retirement Education Event Flyer Sample
- If You Are Hosting A Group Retirement Event
 - Advanced Planning for Retirement Education Events
 - Retirement Education Event for More than 100 Attendees
 - Worksheet for Planning a Retirement Education Event
- Do You Know the Difference? Defined Benefit versus Defined Contribution
- Resources for a Retirement Education Event
- Key Sources for Retirement

Retirement Education events are listed also on the TRTA website under [Calendar](#).

Retirement Education Committee

Policy: The TRTA Retirement Education Committee shall collaborate with Districts and Local Units in developing and sponsoring retirement events for active educators, regardless of status of service, and shall promote collaboration with local school districts. The committee shall collaborate with other standing and special committees as appropriate to further the mission of TRTA.

Suggested Ways to Encourage Retirement Education

The TRTA Local Unit Retirement Education Committee Chairs:

1. Provide retirement education information received from TRTA to active school personnel;
2. Plan and increase special activities such as events, fairs, programs and individual contact. If necessary, combine activities with several local units;
3. Assist and encourage district retirement education committee chairs with retirement activities when appropriate;
4. Promote and provide retirement information of interest to retirees and active school personnel when appropriate;
5. Communicate retirement events to appropriate sources for publication; and
6. Attend the retirement education training session at the Spring Leadership Development Conference and if possible attend the retirement education training session at the TRTA Convention.

The TRTA District Retirement Education Committee Chairs:

1. Be a facilitator for distributing TRTA retirement education materials to local unit retirement education committee chairs in the district;
2. Provide information of interest for active school personnel and retirees to local unit retirement education committee chairs;
3. Plan TRTA district activities to encourage and increase district-wide events, fairs, programs and individual contact;
4. Serve as resource person to local unit chairs;
5. Promote and provide representation of TRTA and retirement information at active teacher organization events;
6. Encourage local unit retirement education committee chairs to post events on websites;
7. Serve as trainer of the retirement education activities for local unit retirement education committee chairs at the Spring Leadership Development Conference; and
8. Attend the TRTA Convention retirement education training session.

The TRTA State Retirement Education Committee Chair:

1. Develop and implement with the committee a retirement education program;
2. Identify a list of resource persons for retirement education events;
3. Work with TRTA leaders to ensure that the district committee chairs get the support and training needed to carry out their responsibilities;
4. Gather information related to TRTA and TRS which would be of interest to retired school personnel and future retirees and send it to the district chairs; and
5. Serve as presenter to train district and local unit counterparts at the TRTA Convention.

Retirement Education Information Request

TRTA will promote events and provide resources for the presenters and attendees.
Complete and return as soon as the date for your event is confirmed.

Event
Contact

Name _____

Phone _____ Email _____

Local _____ District _____

Calendar
Event
Details

Date of Event _____ Time _____

Building Name/Room _____

Address _____

City _____ State _____ Zip _____

Sponsored by: Local District With TRS Without TRS

Email for RSVPs to event: _____

RSVP Contact
Support

Need TRTA setup for RSVP email? Yes No

Resources

Number of attendees _____

Mail to: Name _____

Address _____

City _____ State _____ Zip _____

TRTA will gladly send you the necessary materials for your event, as well as post the information on the TRTA website. In order to process this request, complete and return as soon as the date for your event is confirmed. This will allow TRTA enough time to process and deliver in a timely manner prior to your event. **Additional information is available at www.trta.org/retirementeducation.**

Submit to
TRTA

Email: info@trta.org

Mail: Texas Retired Teachers Association
ATTN: Retirement Education Request
313 E. 12th Street, Suite 200
Austin, TX 78701



Types of Retirement Education Events and Activities

Adopt a School

1. Talk to superintendent and principal about bringing TRS and TRTA information to the staff
2. Mentor
3. Give “goodie bags” with TRTA information included
4. Present a membership to a future retiree at PTO and other parent/teacher group meetings
5. Present TRS and TRTA literature at a faculty meeting (please note, individual questions about retirement benefits should be referred to TRS at 1.800.223.8778)
6. Ask to put up posters in lounge
7. Provide teacher lounge snacks occasionally
8. Provide refreshments on a teacher in-service day

Breakfast/Brunch/Dinner or Luncheon

1. Invite a local member or district officer to speak about TRTA using the retirement education brochures and give only the ones discussed. Do not give brochures to be read later.
2. Give the TRS Benefits Handbook
3. Provide TRTA local unit membership forms

ISD Retirement Banquet

1. Ask for a few minutes on the agenda
2. Invite a local member or district officer to speak about TRTA
3. Have TRTA and local membership forms available
4. Give “goodie bag” to each retiree with TRTA and local membership forms
5. Have a drawing for a first-year membership
6. Ask PTA to give a first-year membership
7. Ask ISD Superintendent to give first year membership

Scholarship Presentations

1. Present scholarship at school with a short talk about TRTA
2. Give a goodie bag

One on One

1. Keep brochures, TRTA phone number, enrollment for, etc. in your purse or car.
2. Use the “Each One Bring One” form

Community Events and Fairs

1. Get a booth at the local fairs or community events
2. Hand out membership brochures and pamphlets
3. Have “Each One Bring One” for distribution

Retirement Education Fair

1. Have a fair in open area such as exhibit hall and set up individual booths
2. Invite active public schools and higher education personnel to be guests
3. Solicit different individuals, organizations, and business to participate as resources.
4. Attendees should be able to visit and learn from each booth or table
5. Have a room where TRTA and TRS presentation could run several times during the day

6. Suggestions for booth/exhibits include, but are not limited to:
 - Attorneys working with wills and estate planning
 - Banks and Credit unions for investment counseling
 - TRTA endorsed member benefits companies
 - YMCA or similar organizations in your community that offer wellness programs
 - Senior Citizen centers/community parks and recreation services
 - Organizations recruiting volunteers such as hospitals, museums, etc.
 - School district retirement procedures
 - Social Security
 - TRS printed information and sources for additional information
 - Travel agencies
7. Arrange to have door prizes and drawing for door prizes
8. Send letters of appreciation to all assisting after the event
9. Request follow-up information regarding event from those attending

Campus Coordinator Program

1. The program is coordinated by the Retirement Education Committee Chair.
2. A local member is appointed as coordinator of each campus. In most instances that person is a former staff member.
3. The campus coordinator will visit the principal at the beginning of the school year explaining what they plan to do and try to gain approval from the principal.
4. The campus coordinator will visit their campus each month and may leave newsletters, pamphlets, copies of the "Inside Line", the fact page "Do You Know the Difference," copies of *The VOICE*, and the Texas Retired Teachers Foundation brochure "Giving Guide" in the faculty workroom or in teacher mailboxes.
5. Brochures copied from the TRS and TRTA websites may be left from time to time.
6. Unique ideas for monthly campus visits. If possible, prepare the following items for each ISD employee:
 - September: Leave snack bags filled with raisins, cranberries, nuts, and a candy bar with label reading "You are planting the seeds of learning—Thank you! Compliments of (local unit)."
 - October: Leave a small Pay Day candy bar with a label reading "Thank you for your service in our schools—You deserve an extra payday! Compliments of (local unit)."
 - November: Leave a baked treat in the work room in each campus building. Pumpkin mini-muffins are great for the season. You may place a note that reads "(Local unit) is thankful for your service this Thanksgiving. Enjoy a baked treat from our members!"
 - December: Leave a large container of puff mints in each ISD building with the following note: "Public school employees are "MINT" to be appreciated. Compliments of (local unit)."
 - January: Leave a package of instant cocoa mix for each employee in the mailboxes with a label that reads "Thank you for warming the hearts of students for learning—Enjoy a cup of cocoa! Compliments of (local unit)."
 - February: Leave a snack bag of Hershey's kisses in each mailbox with a label reading "Kisses for you in gratitude for your service!" Compliments of (local unit)."
 - March: Consider leaving baked cookies, such as Pillsbury slice 'n bake shamrocks with the following message: "'Luck O' the Irish' to public school employees—Enjoy cookies from (local unit)!"
 - April: Leave individual bags of jelly beans for each employee with a label reading "You've "BEAN" good for our students—Thank you! Compliments of (local unit)."
 - May: Leave 100 GRAND candy bar with a label reading "You deserve 100 GRAND—Thank you for your service this year! From (local unit)."

Steps for planning Faculty Meeting Presentation

1. Contact the School Superintendent for approval
 - Show your prepared script or PowerPoint
 - Bring the 3 Steps To Plan Your Future brochure
 - Bring the TRTA Facts Sheet and Answer Sheet to accompany the 3 Steps To Plan Your Future brochure which may be printed off of the TRTA web site
2. Schedule with principals
3. Find out how many pamphlets are needed
4. Submit the **Retirement Education Information Request** (included in the resource guide) to the TRTA office as soon as the date is set. TRTA will post event details on the TRTA website under the [Calendar](#) webpage, set up an RSVP email system for registering attendees if needed, and send materials for all of the event attendees.
5. Meet with volunteers to be sure they understand their role
 - Give each volunteer a copy of the TRTA Facts Sheet and Answers
 - Stress that speech will be short
 - Remember not to give advice, only the facts
6. Check to make sure volunteers have scheduled with school principals

Retirement Education Calendar of Planning, Dates, Meeting & Events

Local Committee Chair

July

- Designate a campus coordinator for each ISD and enlist members to help with visits.
- Local president and retirement education chair meet with campus coordinators to plan items for visits.
- Contact superintendents for permission to present information at staff meetings and monthly visits.
- Contact principals for permission to visit each campus and set up at least one time to speak at a campus meeting.
- Develop a budget for events.
- Submit the **Retirement Education Information Request** (included in the resource guide) to the TRTA office as soon as the date for any event is set. TRTA will post event details on the TRTA website under the Calendar webpage, set up an RSVP email system for registering attendees if needed, and send materials for all of the event attendees.

August

- Campus coordinators meet and prepare items for September campus visits. Include a few copies of the state or local unit membership form.
- Complete the “Worksheet for Planning a Retirement Education Event” in resource guide.

September

- Make campus visits and deliver a publication and treats. Report on actions at the local meeting.
- Make a brief report at the local meeting of events.

October

- Prepare for campus visits and include a copy of a TRTA publication or information sheet in each building.
- Make campus visits.
- Make a brief report of events and special information at local meeting.

November and December

- Prepare items for campus visits and deliver to each building.
- Give a brief report of events at the local meeting.

January

- Meet with campus committee members to organize items for delivery and deliver to each building. Prepare a short speech or have a legislative issue handout available for a campus staff meeting.
- Check with campus administrator for permission to present legislative priorities and ask for support from pre-retirees at a campus staff meeting.
- Make preparations for retirement events that are scheduled from January-May. Report events at the local meeting.
- Continue to submit the **Retirement Education Information Request** (included in the resource guide) to the TRTA office as soon as the date for any event is set. TRTA will post event details on the TRTA website under the Calendar webpage, set up an RSVP email system for registering attendees if needed, and send materials for all of the event attendees.

February

- Campus committee members prepare items for delivery to each ISD building and deliver them early in the month.
- Continue to make preparations for events. Report results when event is completed to TRTA state office and at the local meeting.
- Secure an email address in each ISD for distribution of urgent legislative information.

March

- Campus coordinators prepare items for the monthly delivery to each ISD building and complete the deliveries.
- Chair and event committee complete plans and conduct events. Report results when event is completed to TRTA state office.

April

- Attend the TRTA State Convention and the retirement education session.
- Give a brief report of events at the local unit meeting.
- Campus committee members prepare items for campus deliveries and deliver to each ISD building.
- Plan and prepare end-of-year programs for active school employees.

May

- Campus committee members prepare items for campus deliveries and to each ISD building.
- Report on events at the local meeting.

June

- Meet with committee members and campus coordinator participants to evaluate and plan for the next year. Enlist help from new members to make campus visits.

District Committee Chair

July

- Set a time and venue for a district or local retirement seminar.
- Develop a list of events for the year.
- Plan and contact Regional ESC to speak at a monthly ISD superintendent's meeting.

August

- Schedule local or district speakers to present TRTA information at ISD's in-service.

September

- Contact each local unit chair and offer assistance, encourage planning of events, and forward the letter from the state chair.

November

- Monitor retirement education events information and when the event is conducted, make sure that copies of RSVP contact lists and Feedback forms are sent to TRTA state office.

February and March

- Contact locals for event information that has not been submitted.
- Make sure that copies of RSVP contact lists and Feedback forms are sent to TRTA state office.

April

- Attend the TRTA State Convention and the retirement education session.
- Review resource guide to help you prepare and conduct training at Spring Leadership Conference.

May

- Send letter of gratitude to each local chair for efforts to provide information through the past school year to school employees.

State Committee Chair

July

- Schedule state, district and local unit committee meetings.
- Review resource guide with committee members.

August

- Prepare agenda for TRTA State Retirement Education Committee meeting.
- Review previous year's events, resources, minutes, and evaluations.
- Address charges from TRTA President as needed.

September

- Prepare a September letter, provide information for retirees and actives, and email or use USPS to State Retirement Education Committee members.
- Remind members to keep address and other personal information updated with TRS. Prepare information on goals and actions for the District Fall Meetings.
- Committee members contact each district retirement education chair and forward state chair's letter. Offer assistance if needed.

October - December

- Prepare and send newsletter to committee members, and each district president, district chair and local chair.

January

- Meet with State Committee to prepare resource guide and convention presentation.
- Send final draft of resource guide to TRTA for approval by the Executive Committee.

February - April

- Prepare and send newsletters to committee members, and each district president, district chair and local chair to encourage attendance at Spring Leadership Conference and State Convention.
- Prepare Board of Directors report.

April

- Conduct retirement education session at TRTA State Convention.

May

- Prepare final report for Board of Directors.
- Review and evaluate committee charges and actions.

June

- Present final report at Board of Directors meeting.