

**RTA District and Local Legislative Chairs,**

The RTA State Legislative Committee greets you in the midst of trying times. We hope you are well, safe, and looking forward to better days.

The Legislative Session at the RTA Convention had as its goal to provide information that Local and District Legislative Chairmen could use for newsletter articles, announcements at meeting, visits with candidates and with legislators as an education effort. We had planned six short speeches given by a few of our committee members. Each speech was to be accompanied with a one page handout for the chairs to use in their District or Local. We also had planned an election update from Former Representative Vicki Truitt.

Our Convention was canceled due to the virus crisis, so those plans were not realized. (We should be very proud of our RTA Board and Mr. Tim Lee for making that decision when they did. We are all in vulnerable risk groups, and their concern was greatly appreciated.)

RTA is distributing those handouts to the District and Local Chairmen. We hope the simple messages on issues of that address Legislative priorities will be helpful to you.

Thank you. Stay safe, Stay well.

Tonna Duke, RTA State Legislative Committee Chair

# **TRTA LEGISLATIVE TRAINING/ADVOCACY GUIDE**

**The Legislative Training Guide is just what it says it is.**

The Guide gives TRTA members direction when preparing for **ADVOCACY** for the issues and goals of educational retirees.

## **TRTA FOCUS**

- Build Relationships with State Legislature and US Congress.
- Preserve and maintain the TRS Defined Benefit Pension Fund and TRS Care Insurance Plan. Seek adequate funding.
- Protect, Promote, and Defend the interests of TRS members

## **CAN YOU EXPLAIN THE DIFFERENCE?**

### **TRS VS TRTA OR DEFINED BENEFIT VS DEFINED CONTRIBUTION**

- The Guide gives us that information.
- The Guide can be found on the TRTA Website.

## **CONTACT TEAMS**

Each Texas Legislator should have an active District or Local Unit Contact Team. This is a small group (3-4) of TRTA Members who are constituents of the Legislator. This team visits (in the District and in Austin offices), makes telephone calls, writes letters, sends emails, contacts by social media. They do this to build a relationship with the Legislator, and to educate on retiree issues with him/her.

## **EFFECTIVE DIRECT ADVOCACY TIPS**

Identify Yourself	Courtesy
Brevity	Protocol
Accuracy	Appreciation
Preparation	Report Back to TRTA

## **HOMEWORK**

**TERMS** often used and defined in the Guide:

COLA	Advocacy	PAC
Actuarial Soundness	Lobby	Contribution Rates

# RTA POLICY POSITIONS

## 2020 Election Cycle – Communication with Political Candidates

Document Purpose: Adopted by the RTA State Legislative Committee in January 2020 and distribution to RTA members and local units in preparation for communicating with candidates running for political office during the 2020 election cycle.

RTA Purpose and Mission: RTA will build relationships and work with the Texas State Legislature and United States Congress to preserve and maintain the TRS defined benefit pension fund and TRS-Care insurance for all Texas educators and protect, promote and defend the interests of Teacher Retirement System of Texas (TRS) members.

### Policy Positions in Preparation for the 2020 Election Cycle:

<b>Pension Fund Contributions</b>	Secure adequate contributions from the Legislature and stakeholders to meet the pension trust fund obligations and funding increases set to be phased in pursuant to Senate Bill 12 as passed by the 86 <sup>th</sup> Texas Legislature in order to maintain a path to actuarial soundness for the TRS pension fund.
<b>Cost-of-Living Adjustment</b>	Secure legislation to provide a cost-of-living adjustment (COLA) for all TRS annuitants.
<b>Pension Fund Fairness</b>	Secure equal contributions for equal benefits from all employer stakeholder contributors to the pension fund (currently higher education employers pay less contribution per employee than school districts).
<b>TRS-Care Benefits</b>	Provide for benefit improvements and lower out-of-pocket costs for TRS-Care participants and allow a one-time re-enrollment opportunity for any participant who has left the program since 2018.
<b>TRS-Care Funding</b>	Advocate for increased base funding and a long-term funding strategy for TRS-Care insurance indexed to the projected cost of health insurance over time (similar to the ERS insurance funding for state employees).
<b>Rules on Work After Retirement</b>	Reform and simplify employment after retirement statutes and rules to allow retirees to return to work full-time without penalties and modify the structure for half-time retirees dealing with minor return-to-work violations to allow for more fairness when dealing with unexpected circumstances.
<b>TRS Sunset Review</b>	Work collaboratively with TRS through the sunset process to improve administrative and customer service functions of the agency with emphasis on meeting the needs of the retiree members.
<b>Federal Offsets</b>	Reform the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) to eliminate unfair laws and rules affecting public servants who qualify for Social Security benefits.

# INVITING CANDIDATES TO A MEETING

Two ways for retirees to get to know the candidates

1. **Presentation:** Allow candidates 2-5 minutes to talk about their background and their support of public education and retired educators. You can send them the TRTA Policy Positions 2020 beforehand. Allow audience questions.
2. **Forum:** Much more structured. Ask each candidate questions either prepared by the moderators and/or attendees.

## **Steps:**

- a. Book a date, time and place: Ex. your meeting location before or school district, local college. Have speaker system + table for materials.
- b. Invite All the candidates: Send a letter, follow up with phone call. At the event, state that all were invited, but why some couldn't attend.
- c. Advertise highly through email, on Facebook, etc.—early and often.
- d. Select a Moderator to start the dialogue, and to keep the discussion moving on schedule. *A well-known, nonpartisan community member would stimulate interest.*
- f. Select a format:
  1. Prepared questions. Ideas in "TRTA Policy Positions for 2020 Election Cycle". Alternate between candidates: questions should require more than a yes/no answer. (*30 min. max*)
  2. Audience questions: Before the event, pass out cards for the audience to submit their name and question before the event begins. (*10 min.*)
  3. Candidate closing statements (*2 min. each*)
- g. Follow-up with thank you notes and/or phone calls.

## **THE RETIREMENT SYSTEM OF TEXAS (TRS)**

TRS is a State Agency tasked with protecting, investing and managing the pension fund of Texas education retirees. The agency also manages the health insurance of active and retired educators. TRS is under the direction of the Texas State Legislature.

In recent months, TRS members have had concerns. (Examples listed below)

- Making decisions without seeking input from members.
- Large bonuses for staff, investors when members have not received a COLA.
- Not addressing, in a timely manner, member questions, requests, and financial circumstances.
- Hirings of more staff and office space for those hires. Expensive office space for investment staff.
- Lack of oversight by Legislature.

*All items and situations listed are being addressed by The Legislature, TRS, and TRS Members.*

**In an interview on March 27, 2020, Mr. Tim Lee, Executive Director of TRTA discussed TRS Member Concerns with Mr. Brian Guthrie, Executive Director of TRS, on Facebook Live.**

Take a way notes:

- On 3-27-2020, our Pension fund stood at \$151 Billion. Jan. 1, 2020, it was at \$163 Billion (Due to unstable Market) our long term investment plan can withstand fluctuations in the market due to diverse investments.
- Annuities (monthly checks) will NOT change! They will be issued on time. THEY ARE GUARANTEED.
- Today, our pension fund is actuarially sound. Downturns in the economy and market values do affect actuarial soundness. Next measurement, August, 2020.
- Questions from Active Teachers concerning not following through with retirement plans for this year because of the virus crisis and economy changes was answered by Mr. Guthrie. Go ahead and finish the retirement process. Your annuity is based on a formula that will not change.
- Health Insurance will have new providers Jan. 2021.
  - ✓ United for over age 65
  - ✓ Seamless change over
  - ✓ Pays both in and out of Network
  - ✓ Free Gym memberships. Same as we have now.
  - ✓ Doctors and hospitals should be 99% the same. Promises the list will expand. Bears watching as we get more information

ADVOCACY can still take place with Candidates and Legislators through email. Phone calls, handwritten letters, and social media. Mr. Tim Lee, in the March 26<sup>th</sup> Inside Line said, "We believe the situation next Legislative Session may be very challenging and we, as an organization must remain strong and prepared to advocate for the protection and improvement of your TRS retirement benefits.

Runoff Election	July, 2020	(4 Months)
Nov. General Election	Nov, 2020	(8 Months)
Next Legislative Session	Jan, 2021	(10 Months)

# WHERE'S WEP REFORM

WEP=Windfall Elimination Provision

A federal law that greatly reduces the Social Security annuity earned by public servants BEFORE they retired from a non-Social Security job:

*95% Texas school districts opted out of Social Security in the '60's & 70's.*

Nearly 2 million public servants across the U.S. are affected.

"Public Retirees Alliance" was founded. "Like" this group on FB

*Lawmakers agree that the WEP is flawed and unfairly harms public retirees, but they haven't done more than sign onto the bills.*

Two bills that originated in the U.S. Congress Way & Means Committee:

**H.R. 4540** Rep. Richie Neal (D.) & **H.R. 3934** TX Rep. Kevin Brady (R.)

The bills are similar and ask for WEP reform, *not repeal*, which would be too costly.

Currently Congressmen are supporting their party's bill, but we're asking them to sign onto both.

Only one TX Congressman on Ways & Means has not supported either bill.

- Rep. Lloyd Doggett, CD 35---(202) 225-4865

Others:

- Rep. Michael Cloud, CD 27 (202) 225-7742
- Rep. Sheila Jackson Lee, CD 18 (202) 225-1688
- Rep. Mac Thornberry, CD 13 (202) 225-3706

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*Call and urge the above to support both bills! Tell your story!*

U.S. Senator Cornyn—"In the present system, we can't afford it: aging population + federal government raids the Trust Fund. Repeal should be considered as a complete overhaul of the current system."

Resources:

- NEA: Social Security: Brief History of Pension Offset and 'Windfall' Provisions" NEA.org
- Facebook Group: "Retired Texas Educators with TRS/Retirement Concerns"
- TRTA.org, Legislative Updates, Our Issues.