

# TEXAS RETIRED TEACHERS FOUNDATION



# DISTRICT FOUNDATION LIAISON AND LOCAL UNIT FOUNDATION REPRESENTATIVE RESOURCE GUIDE

September 2020



# 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](mailto: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. TRTF Board of Trustees
- IV. A Brief History of the Texas Retired Teachers Foundation
- V. TRTF Annual Calendar of Events
- VI. TRTF Talking Points
- VII. "A Helping Hand" Documents
- VIII. Donation Cards
- IX. Brochures (available by request)
- X. Contact Us

*The TRTF Resource Guide is updated frequently. For the most recent version, please visit [www.trtf.org](http://www.trtf.org) or contact us at [sarah@trta.org](mailto:sarah@trta.org) or [help@trtf.org](mailto:help@trtf.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 or Administrative Assistant Sarah Richardson. (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.
  - 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 Sarah Richardson at TRTA ([sarah@trta.org](mailto:sarah@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.

### **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, and "A Helping Hand." 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."

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 to 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. Applicants must be referred by 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.

## Frequently Asked Questions continued...

### **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 \$98,000! 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 Sarah Richardson. Donations may also be made through the TRTF website [www.trtf.org/donate](http://www.trtf.org/donate).



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## **Board of Trustees 2020-2021**

Mary Nell Short, Board President

Ronnie Jung, Vice-President

Lynn Granzin, Secretary-Treasurer

Bill Barnes

Maridell Fryar

Elva Garcia

Mary Jane Hamilton

Carla Meuth

Jesse Ramos

Brenda Ritter

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

For questions, suggestions, or brochures  
please contact Sarah Richardson 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 \$204,800 in assistance to date.

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, TRTA Associate Director Cindee Sharp, and TRTA Administrative Assistant Sarah Richardson 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**
  - *Accepting applications for Beginning Teacher Scholarships and Classroom Assistance Grants (applications due by the end of Feb)*
- **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*
  - *Beginning Teacher Scholarship and Classroom Assistance Grant applications for the upcoming year will become available at this time*
- **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*
- **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)*

### **Initiatives and Goals: What our Foundation Achieves!**

- I. Did you know TRTF has given out more than \$585,000 to educators across Texas since 2008? Please help us make a difference in the lives of educators by supporting Foundation Month!
  - a. November 2020 has been designated by the TRTA Board of Directors as Foundation Month.
  - b. TRTF is asking all TRTA local units and districts to designate any meeting this fall to raise funds for Foundation Month.
  - c. All members of TRTA will also receive an annual appeal letter from TRTF in the 3<sup>rd</sup> quarter issue of *The VOICE*.
  - d. Last year, \$107,000 in donations were received from this fundraising effort!
  - e. This year, TRTF hopes to reach \$100,000 in donations again.
  - f. The Foundation's 2020-2021 goals:
    - i. TRTF will provide 25 \$750 Beginning Teacher Scholarships to recent college graduates who will be teaching for the first time in the fall of 2021. This is an increase from the 20 scholarships awarded in 2020. TRTF has awarded more than \$108,000 in scholarship funds since 2008.
    - ii. TRTF will provide 40 \$500 Classroom Assistance Grants to public school teachers in Texas in 2021. This is an increase from the 30 grants awarded in 2020. Since 2008, TRTF has awarded more than \$108,000 in grants for public school teachers.
    - iii. Applications for the Beginning Teacher Scholarship program and the Classroom Assistance Grant program will be available on the TRTF website [www.trtf.org](http://www.trtf.org) for download by September 14, 2020.
    - iv. TRTF will provide \$27,000 in grants to retirees in critical need through the "A Helping Hand" program in 2021. TRTF has provided more than \$204,800 in grants to retired educators since 2010.
    - v. TRTF will provide limited grants through the Disaster Relief Fund as funds allow. We will continue to raise funds for this program to stand ready for the next disaster. In April 2020, TRTF raised over \$54,000 to assist Texas public school personnel affected by the Covid-19 pandemic and distributed grants to 26 individuals.

- vi. TRTF will continue to raise funds for the Lehr-Pritchard Endowment Fund, which began in 2016.
  1. All earnings from the endowment fund will be used to support “A Helping Hand” for the foreseeable future, as more and more retirees may be in need of assistance.

**Donations: Making it Work!**

- II. Donations are needed to support our many charitable programs: Beginning Teacher Scholarships, Classroom Assistance Grants, “A Helping Hand,” as well as the Lehr-Pritchard Endowment Fund and Disaster Relief Fund.
  - a. How to donate:
    - a. Use the donation card found in the Foundation brochure or in the *The VOICE* and mail to the TRTF office:  
TRTF  
313 E. 12<sup>th</sup> Street, Suite 220  
Austin, TX 78701
    - b. Members can also donate online through the TRTF website ([www.trtf.org/donate](http://www.trtf.org/donate)).
    - c. Members may call the TRTF office in Austin at 1.800.880.1650 and speak with Sarah Richardson to make a credit card donation over the phone.

Types of contributions

- b. Donors may give a gift in memory of a loved one. Instead of flowers, members may consider making a lasting memorial contribution to TRTF.
- c. Members may leave a contribution for TRTF in their will.
- d. 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.
- e. All donations will be acknowledged by the Foundation office.

**Why we need our Local Unit Representatives and District Liaisons**

- III. 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.
  - b. TRTF has an electronic newsletter available by email entitled *The Ledger*. Please contact Sarah Richardson to sign up ([help@trtf.org](mailto:help@trtf.org)).
  - c. TRTF has a Resource Guide to help representatives and liaisons. Email [help@trtf.org](mailto:help@trtf.org) to request one.
  - d. 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) (please specify the amount needed and provide a mailing address).

## **TRTF's Programs**

### **IV. "A Helping Hand"**

- a. TRTF's program "A Helping Hand" aids public education retirees in critical, emergency need by providing grants. The program has provided over \$204,800 in grants to 196 retirees.
- b. Applications can be requested by contacting the TRTF office at 1.800.880.1650 or sending an email to [sarah@trtf.org](mailto:sarah@trtf.org). **PLEASE NOTE:** Application materials were updated in August 2018. Please discard any previous application forms.
- c. Local unit presidents or foundation representatives can assist an individual seeking help. They may also receive the grant request and forward them to the TRTF office. 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.
- 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 helped retirees receive space heaters, pay for utilities, medical and dental bills, eyeglasses, food and even a wheelchair. TRTF has also helped purchase hearing aids and dentures.
- e. Recently, our Trustees have been able to refer applicants to an Area Agency on Aging counselor. Some applications that Trustees have reviewed required more help than TRTF was able to provide. Being able to share information about this important resource has provided long-term results for applicants and enhanced their quality of life. For a complete list of Area Agency on Aging offices contact: <https://www.dads.state.tx.us/contact/aaa.cfm>

### **V. *Beginning Teacher Scholarships***

- a. TRTF created the Beginning Teacher Scholarship program to replace its Student Scholarship program in 2017. The program provides funds to recent college graduates who plan to become educators in Texas. Applicants must be referred by a member of TRTA. The scholarship assists recipients with paying for certification tests and materials for their very first classroom. The Foundation will award 25 \$750 scholarships in 2021.
- b. Applications will be available on the TRTF website by September 14, 2020 and are due February 25, 2021.

### **VI. *Classroom Assistance Grants***

- a. 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. TRTF will provide 40 \$500 classroom assistance grants to public school teachers in Texas in 2021.
- b. Applications will be available on the TRTF website by September 14, 2020 and are due February 25, 2021.



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## TRTF Introduces New Tutor Initiative Program in 2020!

The Texas Retired Teachers Foundation (TRTF) is launching a new endeavor that benefits Texas public education students, teachers, and retirees alike. TRTF's mission has been to help educators of the past, present and future through grants and scholarships. **Now, we want to reach every Texas child!**

**TRTF's dream and goal is to provide access to reduced cost tutoring services to the 5.9 million public school students in Texas.**

Many students, teachers, and retirees are struggling due to the abrupt changes made to our public education system because of the Covid-19 pandemic. These circumstances prompted TRTF to launch a program that connects schools and parents to retirees across the state who will tutor students in an online setting on an hourly basis.

**TRTF's tutoring service will employ retired and certified Texas public school teachers who have the experience, time, and dependability needed to engage successfully with students of all ages and educational needs. Retirees can earn between \$30-\$40 per hour without TRS penalty concerns.**

Children will receive the educational support they need as they adapt to virtual learning environments that are quickly becoming the primary mode of education for most Texas families. Their parents will have access to reduced cost, reliable tutoring services that focus on empowering the student to succeed, not on profits!

Public school teachers who are already overloaded with the abrupt changes required for our education system will have a valuable and trusted resource for their students when additional help is needed outside of their daily classroom setting. Our program will help bolster students' learning and support public school teachers, not take away from our much-needed public education system.

Please consider joining our program as a tutor by contacting us at [www.trtf.org/tutors](http://www.trtf.org/tutors), by phone at 1.800.880.1650, or by email at [help@trtf.org](mailto:help@trtf.org). TRTF is also striving to raise donations for the program to help alleviate the cost of tutoring services for families in need. Your donation in any amount is appreciated. Please visit [www.trtf.org/tutorfund](http://www.trtf.org/tutorfund) or call us at the number listed above to make a tax-deductible contribution.



## **Texas Retired Teachers Foundation**

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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. **REQUIRED:** 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, SSA statement, bank statement showing deposits).
  - c. **REQUIRED:** 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. **BLOCK OUT SS NUMBERS.** 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. 220, 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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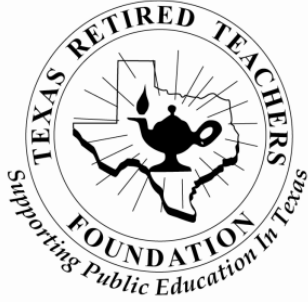
## **“A Helping Hand” Confidentiality Agreement**

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





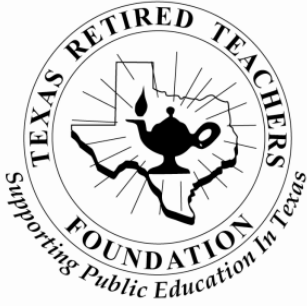
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## **“A Helping Hand” Application Materials**

- **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 benefits 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.

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

The grant seeker 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, estimates, 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 bills, bids or estimates for repairs, collection notices, or other estimates for services. 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 with emergency financial assistance for a 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 (if applicable) or send completed applications to [help@trtf.org](mailto:help@trtf.org) (email), 512.476.1003 (fax), or TRTF, 313 E. 12<sup>th</sup> St., Ste. 220, Austin, TX 78701.

**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

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

Monthly Income (including TRS pension, SS benefits, and any other source of income) \$ \_\_\_\_\_

**(REQUIRED:** Please include a copy of your most recent 1040, as well as proof of income from TRS and SSA, if applicable)

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 \_\_\_\_\_

**(REQUIRED: Please attach qualifying documentation, such as a bill or estimate for services from the specified vendor)**

**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 Foundation/"A Helping Hand" Representative, if applicable

Local Unit \_\_\_\_\_ "A Helping Hand" Representative Name \_\_\_\_\_

Phone \_\_\_\_\_ Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Foundation/"A Helping Hand" Representative Signature \_\_\_\_\_

Date \_\_\_\_\_

**SECTION 4** For Foundation Office Use Only

Approved  Denied  Not Eligible  More information required

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 \_\_\_\_\_

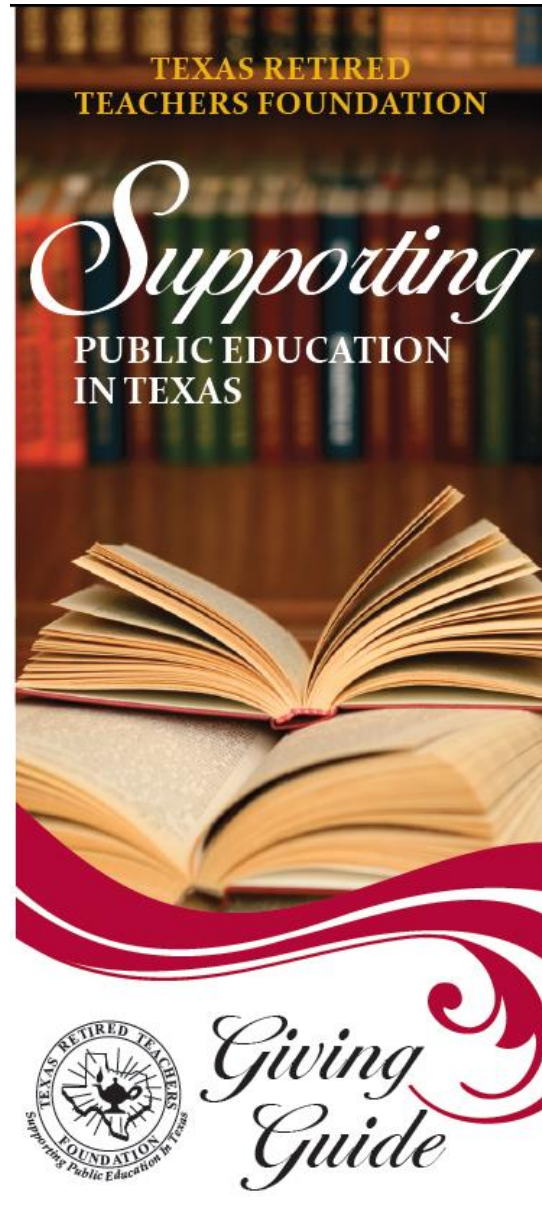
SAVE TRTF A STAMP AND EMAIL ACKNOWLEDGEMENT TO:  
Donations are tax deductible. Enclose a check, completed donation card and send to:  
Texas Retired Teachers Foundation • 313 E. 12th St., Ste. 200 • Austin, TX 78701-1957



# Texas Retired Teachers Foundation

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512.476.1622 ▪ 800-880-1650 ▪ [help@trtf.org](mailto:help@trtf.org)

## Foundation Brochures



Call 1.800.880.1650 or email [help@trtf.org](mailto:help@trtf.org) to order:

Provide your name, mailing address and number of brochures needed

# CONTACT US

For additional information, please contact the Foundation office.

**Contact Person:**

Sarah Richardson or Cindee Sharp

**Phone:**

512.476.1622 or 1.800.880.1650

**Email:**

help@trtf.org

sarah@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

