



# **TEXAS RETIRED TEACHERS ASSOCIATION**

*TRTA: The Voice For All Public Education Retirees*

## **LEGISLATIVE COMMITTEE**

### **RESOURCE GUIDE 2022-2024**

All documents in this guide are available online [www.trta.org/legcomm](http://www.trta.org/legcomm)



# TRTA POLICY POSITIONS

## TRTA Policy Recommendations for TRS Texas

TRTA's priorities are very important to us, and we want them to be very important to our legislators. We want to be seen, heard and respected by our elected officials. It is extremely important for all TRTA members to be active during the campaigns in the spring and fall. The major effort will be on educating legislators and candidates about our issues.

Get to know the candidates and their staff personally. **NOW is the time for you and your fellow retirees to tell the story! Be sure to stay on message and use the talking points above to help you.** A cohesive message across the state will help TRTA get commitments from legislators before Legislative Session begins in January. You may view a download a printable version of TRTA's Policy Recommendations for TRS Texas at [www.trta.org/our-issues](http://www.trta.org/our-issues).

**TRTA Purpose and Mission:** The Texas Retired Teachers Association (TRTA) works closely with the Texas Legislature and U.S. Congress to preserve and maintain the Teacher Retirement System (TRS) pension fund and TRS-Care insurance plan for all Texas educators. Together, we protect, promote, and defend the interests of TRS members.

### TRTA STATE ISSUES

**Preserve TRS Texas Traditional Defined Benefit Retirement Plan:** TRTA's primary public policy objective is the preservation of the TRS traditional defined benefit plan for all public-school retirees and pre-retirees. TRS proves that when these plans are managed and funded appropriately, they provide cost-efficient retirement security for plan participants and taxpayers alike. Please note that 95% of public-school employees do not participate in Social Security. This saves Texas taxpayers billions of dollars, but also raises the stakes when ensuring the TRS traditional defined benefit plan remains strong and viable for all future retirees.

**Fund TRS Pension Trust:** In 2019, TRTA championed the "TRS Actuarial Soundness—Raise the Base!" plan (Senate Bill 12). This plan is a multi-session increased funding initiative that will ensure the long-term solvency of TRS. TRTA members urge the 88th Texas Legislature to continue the plan by introducing and adopting a state budget that funds contribution rates of 8.25% for the state and active educators and 1.9% for school districts by 2024.

**Support a COLA for TRS Retirees:** TRTA is aware of the sincere interest expressed by the Legislature over the past several years to take steps regarding the loss of income retirees are experiencing. TRTA welcomes the open expression of support from legislators to address this issue during the 88th Texas Legislative Session. TRTA urges the enactment of a cost-of-living adjustment (COLA) for TRS retirees as an emergency item in the coming session.

**Protect TRS-Care:** TRTA appreciates the work of the Legislature to address increasing health care costs for TRS retirees over the past several years. However, it is our belief that the best solution for this issue is to design and implement a long-term plan that continuously reviews health care costs and associated state funding and compares them to the actual costs of health care. This solution would take the place of the current arbitrary formula that was established 35 years ago when TRS-Care was created.

## TRTA FEDERAL ISSUES

Arbitrary WEP Out, Fairness Now! The Windfall Elimination Provision (WEP) is an arbitrary formula from the 1980's and it is neither fair or needed. Congress knows that there is a better way. TRTA calls on Congress to pass WEP reform now and end the arbitrary and unfair WEP!

Stop the GPO pain! The Government Pension Offset unfairly penalizes public servants, including Texas retired school employees. The worst part is GPO typically hurts seniors after the loss of a spouse who was a Social Security recipient. The GPO is bad public policy that needs to be reformed immediately.

One-and-Done on GPO! While TRTA pushes an aggressive repeal/reform of the current Government Pension Offset (GPO), we believe Congress could and should implement a policy we refer to as "One-and-Done." Texas has many TRS retirees that have been hit with the GPO, but the impact of this unfair provision did not completely offset their spousal/auxiliary benefit. Whenever TRTA secures a benefit increase for retirees on their state pension benefits, the federal government then reduces the retiree's remaining spousal/auxiliary benefit. This is punitive and impractical and should come to an end! TRTA says if the federal GPO already has been applied to a retiree's spousal/ auxiliary benefit and it was not eliminated completely, then no further reduction in their Social Security income should occur ever again when there is an increase in their state pension benefits.

Protect the Texas TRS Defined Benefit Plan. Some leaders in Washington, D.C. have touted the idea that Texas public employees who are not paying into Social Security should be forced to do so. This concept is known as Mandatory Social Security. While there may be some advantages to having all Texas public workers pay into the federal Social Security program, the strategy to implement the concept often leaves our state defined benefit retirement systems without the assurance that it will be protected and remain fully funded.

**LEGISLATIVE COMMITTEE TRAINING SESSION**  
**Teamwork, Commitment, Time**

**Note:** The Legislative Resource Guide is a resource for all of TRTA members to use. The District Legislative Chair will use the guide for training at the District’s Spring Conference and at any time that new legislative chairs are named. The guide is online at [www.trta.org](http://www.trta.org). Key sections are in bold (noted by page number in the guide).

**Focal points:**

- We want to be heard, seen and respected
- We are better together speaking as one voice.
- Attitude is everything and is crucial to our success.

**Texas Retired Teachers Association Priorities:**

- Preserve TRS Texas Traditional Defined Benefit Retirement Plan
- Fund TRS Pension Trust: Continue Senate Bill 12 legislation to fund increased contributions through 2024
- Support a meaningful COLA for TRS Retirees
- Protect TRS-Care: Design long-term plan for base funding
- Ensure earned Social Security benefits are paid to retirees: Support repeal of the federal provisions GPO and WEP

**NOW TELL YOUR STORY**

When visiting a local or state legislator’s office, stay on message by asking the following questions:

- Will you protect the base funding for the Teacher Retirement System as a Defined Benefit plan?
- Will you support the Teacher Retirement System’s TRS-Care insurance continuation and raising the base funding for this program?
- Will you support a meaningful COLA for TRS Retirees?

Thank the Legislator, leave and start planning for your next visit either at the state office or the local district office). **STAY IN CONSTANT COMMUNICATION MODE!**

**Legislative Committee member suggested activities**

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**Communication**

- Disseminate information from the State Office
- Establish a contact team (1-3 local members) for each Representative and Senator
- Establish a personal relationship with your Representative and Senator
- Receive information from local chapters and pass it on to District and State members
- Always be prepared to speak at local, district, or state meetings
- Stay informed and up-to-date using *The Inside Line*, *The VOICE*, TRTA YouTube videos, Facebook, Twitter, newspapers, TV, and [www.trta.org](http://www.trta.org)

**TRTA and the Teacher Retirement System of Texas**

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- Texas Constitution guarantees you will have a pension for life.
- Texas Constitution does not guarantee other benefits.

**Defined Benefit vs. Defined Contribution**

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**Advocacy and Communication Tips**

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**Grassroots Involvement—Golden Rules**

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**Visiting the Representative and Senators Key:** Be Prepared, Be Positive, Be Brief, Be Courteous,  
Use Proper Protocol, and Show Gratitude

**Other information: Websites**

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## THE 2022-2023 LEGISLATIVE TEAM

The TRTA Legislative team:

In Austin

- |   |                           |
|---|---------------------------|
| • TRTA President                                | Marcy Cann                |
| • TRTA Executive Director                       | Tim Lee                   |
| • TRTA Legislative Coordinator/ Committee Chair | Dr. Mary Widmier          |
| • TRTA Retirement Consultant                    | Ronnie Jung               |
| • TRTA Consultant                               | Andrew Weber              |
| • TRTA Lobbyist                                 | Vicki Truitt              |
| • TRTA Associate Directors                      | Brock Gregg, Cindee Sharp |
| • TRTA Multimedia Specialist                    | Roy Varney                |

Around the State

- TRTA State Legislative Committee: 20 members (visit [www.trta.org/legcomm](http://www.trta.org/legcomm) to see all twenty committee members and to contact them)
- TRTA District Legislative Chairs: 20 members
- TRTA Local Legislative Chairs: 250 members
- TRTA members: 96,000+ members

These member representatives are advocates for:

- TRS 1.8 million members (active and retired)
- TRS 458,000+ annuitants

## **LEGISLATIVE COMMITTEE**

The Legislative Committee shall study pending legislation, develop & implement a plan to promote new legislation, and continuously inform members about related legislation. The committee shall collaborate with the Texas Silver-Haired Legislature, NRTA, other similar organizations, & with other education organizations concerning retirement issues. The committee shall collaborate with other standing & special committees as appropriate to further the mission of TRTA.

**The link between the TRTA Legislative Coordinator, State Legislative Committee, and The District and Local Unit chairs must be maintained if the TRTA State Legislative Committee is to be effective.**

### **Legislative Coordinator**

The TRTA Legislative Coordinator is recommended by the TRTA President with the approval of the Executive Committee, while working under the direction of the TRTA Executive Director. The Legislative Coordinator shall:

1. Serve as a voting member of the Board of Directors,
2. Work with the Executive Director, legislative team, and state legislative committee to implement state and federal goals and priorities,
3. Schedule meetings with Texas State House and Senate members and congressional members and/or staff to advocate for approved association state and federal policy objectives,
4. Attend House and Senate committee hearings and provide public testimony as directed,
5. Monitor proposed legislation impacting TRS retirees,
6. Implement an effective communications strategy during legislative sessions and interim periods and help facilitate Capitol visits with committee members,
7. Attend TRS Board meetings as needed,
8. May serve as TRTA Legislative Committee Chair and appoint members of the TRTA Legislative Committee, with review by the Board of Directors.

### **Suggested Activities**

#### **The TRTA State Legislative Committee Chair:**

1. The Chair is appointed by the TRTA State President with the approval of the TRTA Board of Directors.
2. The Chair is responsible to and collaborates with the Board of Directors and the Executive Director and other state committees as needed to further the mission of TRTA.
3. The Chair is a member of the Legislative Team which includes the Executive Director, legislative consultants, lobbyists, the TRTA Legislative Coordinator, TRTA staff members, and the TRTA President.
4. The Chair presides at all TRTA State Legislative Committee meetings. He/she develops meeting agendas with input from the Legislative Team and the members of the committee.
5. As per the TRTA Bylaws, the Chair appoints committee members (20) and submits those recommendations to the Board of Directors for approval. If necessary, replacement members are identified with the departing member, District President, and Chair choosing the new member. The Chair offers a shadowing opportunity to replacement member for six months and attendance at the January meeting before assuming his/her position.
6. The Chair communicates with the committee monthly to ensure current issues are addressed.
7. The Chair develops a positive working relationship with the TRTA staff, working with key members in preparation for committee meetings on the agenda and materials, as well as arrangements for hotel, meals, and travel.



8. The Chair prepares for and conducts a minimum of two required meetings per year to be held in January and July.
9. The Chair appoints subcommittees as needed to work on various projects that promote the goals of the TRTA Legislative agenda, such as creating talking points, legislative priorities, and a plan of action.
10. The Chair shall model a plan of communication and civic engagement to the members of the committee, instructing members to plan an information chain and alert system with local chapter chairs and TRTA members.
11. The Chair is responsible for updating materials such as the Legislative Training Initiative guides, the Committee Resource Guide for convention, and any other critical documents as needed.
12. The Chair is responsible for calling legislative committee meetings as needed utilizing conference calls when possible.
13. The Chair is responsible for managing the Legislative Committee budget as approved by the TRTA Board of Directors by working closely with the Executive Director and the Deputy Director.
14. The Chair works with the Legislative Coordinator under the direction of the TRTA Executive Director.
15. The Chair works with the committee members in facilitating visits with legislators and/or staffers at the Capitol during the legislative session and arranges for follow-up reports to be submitted by committee members following their visits.
16. The Chair conducts and presents a breakout session at the state convention.
17. The Chair submits a written report of committee activities to be published in the convention program.
18. The Chair submits written reports as required to the Board of Directors.
19. The Chair communicates at all times with the TRTA Executive Director.
20. The Chair establishes working relationships with legislators and their staff to facilitate Capitol visits, and when possible attends committee hearings at the Capitol.
21. The Chair establishes working relationships with external education and political groups to further information exchange and accomplish common goals.

**The TRTA District Legislative Committee Chairs:**

1. Share TRTA legislative priorities and legislative updates with all local chapter legislative committee chairs and local chapter presidents for dissemination to local chapter members.
2. Disseminate information from the TRTA Legislative Committee to the local legislative committee chairs;
3. Receive information from the local chapter legislative committee chairs to send to the TRTA Legislative Committee and the TRTA Legislative Coordinator;
4. Work with local chapters to maintain communication and personal contact with Texas and U.S. Senators and Representatives;
5. Be aware of legislative issues and elections in the district and share this information with the state legislative committee and state legislative coordinator;
6. Chair a district legislative task force committee composed of the local chapter legislative committee chairs or a local chapter member from each local chapter in the district;
7. Attend the TRTA Convention legislative training session if possible; and
8. Serve as presenter of the legislative committee training for local chapter legislative committee chairs at the District's Spring Leadership Conference;

### **The TRTA Local Chapter Legislative Committee Chairs:**

1. Ensure communications with local chapter members by:
  - a. Relaying to members information received from TRTA and the district legislative committee chair;
  - b. Working closely with the local chapter president to maintain a group email listing for communicating with local members;
  - c. Setting up a network for quick communication among members, if appropriate; and
  - d. Working with the chapter technology contact to post legislative updates on the local chapter web page, if appropriate.
2. Sign up for the Inside Line at [www.trta.org](http://www.trta.org) and urge all members to do so also.
3. Organize a local contact team (one to three members) for each local Texas Senator and Representative and each U.S. Congressman representing your area to relay TRTA legislative priorities and concerns;
4. Make a legislative report at each local chapter meeting and include legislative news in each chapter newsletter;
5. Check the TRTA website for legislative updates and work with the technology contact(s) in the local chapter to include a link to legislative updates on the local chapter's web page;
6. Survey members to determine legislative priorities to assist the TRTA legislative committee;
7. Attend the legislative training session at the TRTA Convention, if possible, and attend the legislative training session at the District's Spring Conference.

# **TRTA AND THE TEACHER RETIREMENT SYSTEM OF TEXAS**

## THE TEACHER RETIREMENT SYSTEM OF TEXAS

The Teacher Retirement System of Texas (TRS) was established through a constitutional amendment passed in 1936. The enabling legislation was enacted the following year. TRS was created to provide a retirement program for persons employed in public education, including professional and business administration, supervision and instruction. Membership was extended to auxiliary employees in 1949; and in 1977, all distinctions between teacher and auxiliary employees were removed.



**Article 16, Section 67 of the Texas Constitution and state statute 821.006** provide that the state contribution may not be less than six percent and not more than ten percent of the aggregate (total payroll) pay of active school personnel. The statute also provides that members' contributions may not be less than six percent of their salaries. The Constitution additionally requires that the financing of benefits must be based on sound actuarial principles (actuarial soundness), and that the assets are held in trust for the benefit of the members and may not be diverted. Actuarial soundness means that the TRS pension fund must be able to pay the benefits for all present and future retirees within a 31-year period. Usually in the month of February, an actuarial evaluation is due from TRS to the Texas Legislature to validate the fund's actuarial soundness. If on that date the fund is ruled to be actuarially sound, then a benefit increase may be paid to retirees. The Legislature must pass a bill authorizing for this benefit increase.

Because of legislation passed during the 86<sup>th</sup> Legislative Session (Senate Bill 12), the TRS pension fund is now on a path toward actuarial soundness. Every effort must be made to protect this fund, and to continue this plan. TRS represents financial stability and security for more than 1,400,000 active members and more than 458,000 retirees and beneficiaries. TRS is inherently a political institution. The system was born out of political action and submitted to the voters for the approval as an amendment to the Texas Constitution. Consequently, all benefit improvements granted to the members must be approved through legislative action.

## TRTA LEGISLATIVE INFORMATION

The constitutional and statutory duties of the Teacher Retirement System (TRS) Board of Trustees and the management staff are to administer the retirement system and invest the retirement funds. Advocating for influencing legislation by the TRS Board of Trustees or management staff for changes or annuity increases is prohibited.

The Texas Retired Teachers Association (TRTA) believes it is the responsibility of the TRS Board of Trustees and management staff to provide accurate and timely information to active and retired TRS members. TRS members need this information to develop improvements for active and retired members. TRTA is recognized as the organization responsible for advocating and working for benefit improvements for retired members of TRS. TRTA is the organization that works exclusively for retired public school and higher education employees. TRTA has been involved actively in proposing, monitoring, and supporting legislation benefiting retired and active public-school employees since its formation in 1953.

All of our annuity increases have been ad hoc benefits (pension and health care), requiring repeated requests during each legislative session. We have enjoyed very good support from our legislators, and we certainly appreciate them understanding our concerns. Benefit increases granted by TRS require legislative action and approval; therefore, we must remain alert and involved in the legislative process. We have a responsibility to become knowledgeable about our legislative priorities and proposals. It is also our responsibility to communicate our legislative priorities and proposals to the Legislature, other educational organizations, and our membership.

The retired and active members of TRS must be prepared and ready to become involved in support of legislative proposals affecting the welfare of the system. All local retired teacher association (RTA) chapters must have in operation a procedure for distribution of legislative updates to their members. It is the responsibility of the President of the local chapter to appoint a legislative chair who will be active and keep the membership fully informed about legislative matters. The local chapter should have a telephone committee, and if possible, an email list in operation for instant contact with legislators.

In large metropolitan areas, where the membership resides within several legislative districts, legislative committee members may be designated to contact legislators in the district where they live. TRTA's responsibility is to contact legislators, attend hearings to express our concerns and positions on legislative proposals, and request their support. The individual members of TRTA who live in the legislative district throughout the state can vote for these legislators; therefore, they must contact their Representatives and Senators and ask for their votes and support of legislative proposals. Many times, it will be a key staff person you will talk to when your legislator is not available. They are very helpful and usually can answer most of your questions. Treat them with respect and courtesy and express your appreciation for their help. To be effective with your legislator, good rapport with his or her staff is essential.



## **DO YOU KNOW THE DIFFERENCE?**

### **Defined Benefit vs. Defined Contribution**

Do you know the difference between a defined benefit retirement plan and a defined contribution plan? Public school personnel in Texas participate in a defined benefit (DB) program. The DB plan is very important for members of the Teacher Retirement System of Texas (TRS), as our annuities are guaranteed for life by the Texas Constitution. Our annuities are determined by number of years of service, age at retirement, highest salary and a 2.3 multiplier. The state of Texas, by law, is required to contribute a minimum of 6% and a maximum of 10% of the active aggregate teacher payroll to the pension fund. The state contribution was 6.8% in 2019, increased to 7.5% for 2020 and 2021, increased to 7.75% in 2022, will increase to 8.0% in 2023, and finally will reach 8.25% in 2024. Active employees now pay 7.7% of their salaries into the fund, an amount that increased gradually from 6.4% in 2014. This amount will increase again in 2022 to 8.0% and in 2024 to 8.25%. School districts contributed 1.5% through 2020, but this increased to 1.60% in 2021, and will further increase to 1.70% in 2022, 1.80% in 2023, 1.90% in 2024, and finally 2.00% in 2025. The increases are the result of the passage of Senate Bill 12 in 2019 during the 86th Legislative Session. TRS manages the plan, invests the funds and pays out benefits to annuitants monthly.

There are groups that want to eliminate defined benefit programs and replace them with defined contribution (DC) plans. DC plans require individuals to make investment and contribution decisions. Unlike DB plans, they are portable from job to job; however, this encourages job transition that is very costly for the workforce, especially public education. The employee must ride the ups and downs of the market. This shifts the responsibility onto retirees, who can outlive the benefits they receive or be faced with unpredictable retirement income. In contrast, the DB plan assures a lifetime annuity. It is especially important for TRS to remain a defined benefit program as most Texas public school districts are not coordinated with Social Security, and TRS serves as their only form of retirement security.

#### **DB vs. DC: Highlights**

	<u>DB</u>	<u>DC</u>
Guaranteed for life	Yes	No
Managed by TRS investment professionals	Yes	No
Selling point for recruiting and retaining teachers	Yes	No
Generates a predictable, steady retirement income	Yes	No
Sole guaranteed income for most Texas retirees	Yes	No
Allows retirement on predetermined and predictable formula	Yes	No
Rewards years of service and job stability	Yes	No
Provides secure disability and survivor benefits based on the individual's years of service and established formula	Yes	No

## DEFINED BENEFIT VS. DEFINED CONTRIBUTION

What is a Defined Benefit Plan?	What is a Defined Contribution Plan?
<p><b>A DEFINED BENEFIT PLAN (DB)</b> is a pension plan in which an employer promises a specified monthly benefit on retirement that is predetermined by a formula. It is not solely based on investment returns.</p>	<p><b>A DEFINED CONTRIBUTION PLAN (DC) PLAN</b>, such as a 401(k), is a pension plan in which the employee is only guaranteed the balance in the account at the time of retirement. This may fluctuate significantly due to the investment earnings and employers varying contributions depending upon the economy.</p>

Properties of a Defined Benefit Plan	Properties of a Defined Contribution Plan
<p>Your monthly income is determined before you retire based on your years of service, the average or the three highest years during your service and a specified multiplier (now 2.3%) You are guaranteed to receive this value for the rest of your life unless you choose a plan which assures your beneficiary of income after your death.</p>	<p>You are only guaranteed the size of your annuity at the time of retirement. You will specify your monthly retirement—usually ½ of 6% of your annuity, but that number will fluctuate as the amount in your account varies, depending on the interest rate it is earning.</p>
<p>You are guaranteed to receive this value for the rest of your life unless you choose a plan which assures your beneficiary of income after your death.</p>	<p>You are guaranteed an income only until the amount in your account is exhausted.</p>
<p>You cannot outlive your annuity.</p>	<p>If you live long enough to <b>EXHAUST</b> your annuity amount plus interest, your income from the annuity will stop.</p>
<p>Funds are managed by TRS investment professionals.</p>	<p>Funds are managed by you or by an investment professional which you employ, usually chosen from a State approved list of investment managers.</p>
<p>Interest income rate on your account will be based on the total amount in the TRS fund. The average varies; however the return is better because of the total amount of the fund.</p>	<p>Interest income on your account will be based on the amount in your account, and will generally be the prevailing rate for CDs or annuities.</p>
<p>Your cost of investment will be the total of the salaries of those TRS hires to administer the fund divided by the number of TRS members. Currently that is over 1.8 million—an extremely low cost per year per TRS member!</p>	<p>The cost of investment will be the rate charged by the company you choose to manage your account. This can be a significant amount depending on the type of investments and the investment activity you choose.</p>

**WHO WANTS TO CHANGE THE PLAN?**

Primarily a group of investment management companies.

<b>WHY ARE THEY PROMOTING DC PLANS &amp; WHY ARE DC PLANS BEING CONSIDERED BY THE STATE?</b>
To be able to act as managers of individual retiree accounts. There is a considerable amount of money involved.
To allow employers to reduce both benefits and contributions significantly.
In the opinion of those promoting a DC plan, to save money for the taxpayer of Texas. Texas taxpayers contribute considerably less than if teachers were under mandatory Social Security. Local schools would have to find the funds (\$5 billion per year) to pay the employer rate of 6.2%. By comparison, Texas taxpayers put in \$4 billion into TRS in 2011 and only \$3.54 billion in 2012. Current employees would also have to contribute the normal employee rate of 6.2%.

**OPPONENTS ARE MAKING ALLEGATIONS ABOUT THE TRS DB PLAN**

<b>Allegation</b>	<b>Fact</b>
The TRS fund is underfunded and not stable.	TRS was underfunded for many years because the State contribution of 6.8 % was very low. However, after increased contributions and an investment return of 24.8% in 2021, it is now actuarially sound with a funding period of 23 years and exceeds the national standard (a funding period of 31 years is considered the preferred standard).
The TRS Fund was hurt by the last recession and it was irreparably damaged.	The TRS fund was hurt by the recession, but the high earnings of the fund in recent years and the increased levels of contribution mandated by SB 12 have brought it back.
As a retired or currently employed Texas public educator in the program, you will not be affected by such a change; only teachers entering the system <b>AFTER</b> the change will be affected.	This is FALSE! Although currently retired or employed Texas educators will remain in the current plan, without active employee contributions, which account for 20% of the value of the fund, TRS will NOT be able to maintain the current trust valuation of over \$200 billion or remain actuarially sound.





# **ADVOCACY TIPS**

## ADVOCACY AND POLITICAL ACTION

In a political sense, the term lobbyist refers to someone who seeks to influence legislation. TRTA's advocacy reflects that same type of effort to benefit the interests of all retired educators in Texas, even those who are not members of the association.

Lobbying is a concerted effort designed to achieve some result, typically from government authorities and elected officials. It consists of reaching out to legislative members, public actions (e.g. mass demonstrations) and encouraging constituents to contact their representatives. Practitioners may work in specialist organizations sometimes known as "government affairs" or "public affairs."

A lobbyist is a person who tries to influence legislation on behalf of a special interest. The effort is to influence issues and votes, either a vote FOR or AGAINST. The lobbyist speaks for his employer's interests as his employer's representative.

Informational lobbying by those not paid or employed by the special interest group is more commonly called "advocacy." Both lobbyists and advocates of interest groups make use of their experience or knowledge on issues of importance for policymakers and are often regarded as an important means of influence. It is hoped that legislators will, on average, make "better" decisions with lobbying than without. Advocates can likewise impress upon the legislators the importance of an issue to a special interest group. TRTA makes use of employees within the organization, special consultants, and lobbyists. In addition, its many members act as volunteer advocates and offer additional information and influence on individual lawmakers to highlight our priorities and goals. The more information available, the more likely it is that the legislator will make a correct, fully informed decision.

## PAC

**A Political Action Committee or a PAC** is the name commonly given to a private group, regardless of size, organized to elect or defeat government officials or to promote legislation. State or federal laws regulate PACs. Under the Federal Election Campaign Act, an organization becomes a "political committee" by receiving contributions or making expenditures in excess of \$1000 for the purpose of influencing a federal election. The state may have similar regulations.

**TRTA does not have a PAC. Why?** The TRTA House of Delegates decides this issue and has chosen not to form a political action committee.

**TRTA has a volunteer legislative committee.** In 2012, the TRTA Legislative Training Initiative was first implemented at the local, district and state level and continues each year. Any member of TRTA can download the documents created for the TRTA Legislative Training Initiative on [www.trta.org/legcomm](http://www.trta.org/legcomm), receive updates and information via the *Inside Line*, and learn how to best advocate for our priorities through TRTA communications and activities.

## EFFECTIVE DIRECT ADVOCACY TIPS

We have several tips for making sure your meeting goes smoothly and your concerns are heard. Please be aware that legislators and staffers are often pressed for time and meet with many constituents during any given day. You want your message to be memorable for the right reasons, so remember the following:

**IDENTIFY YOURSELF:** Give your Senator or Representative or their staff member your business card.

**BREVITY:** In order to be effective, your presentations must be short. Whether your presentation is an informal conversation with an elected official in the hallway or a very structured presentation before an appropriations committee, it should be emphatic and to the point. You should always introduce yourself and tell whom you represent (including the number of TRS members in the elected official's district if you have it), the extent of your interest and involvement with a particular issue, and why you believe there is a need for some specific legislation to address the problem.

**ACCURACY:** You should always provide accurate information. The credibility of your testimony depends on its accuracy. If you cannot supply documentation to support your claim, do not make the statement. Since most of the issues you will be supporting will require repeated interaction with elected officials, administrators or staff in their offices, it is best to start with a correct base of information. Never lie! If you do not know an answer to a question, respond with "I don't know, but I will find that information for you" rather than guessing.

**PREPARATION:** Be prepared. Review any bills you plan to discuss thoroughly along with the support materials you are bringing along so that you may speak knowledgably. Anticipate questions. Before you meet with any elected official or community leader, have your thoughts organized. Remember that the burden of proof is on you. In order for you to be effective, you must establish your position with clear and convincing evidence. TRTA Fact Pages (provided by the state office) are excellent resources for you and your legislators.

**COURTESY:** Be polite, not demanding. Too often, advocates alienate entire legislative committees even though some of the elected officials may have been in agreement with the position originally. This change in attitude often occurs because the advocate was rude, hostile or combative.

**PROTOCOL:** You should address the elected official using a proper salutation (for example, Senator Harris or Representative Smith). Attire is business. Always carry your RTA business cards if you have them (or consider having some made). A business card provides a quick and easy method for legislators and staffers to get in touch with you if questions arise after your appointment.

**APPRECIATION:** Thank the elected official. Too often, we ask elected officials to act in our interest, but we fail to express our appreciation. When your elected official does something for you, respond accordingly with a note of gratitude, recapping what the elected official has agreed to do. When drafting your letter or email, keep in mind that your letter or parts of it may show up in the future campaign literature. Consider checking with your legislative chair, lobbyist, state president or executive director before sending the letter.

**REPORT BACK TO TRTA:** Contact the TRTA state office to let us know how your meeting went. What questions did the legislator pose that we can help answer? What concerns do you have as a constituent that were raised during the meeting? Your feedback is vital to our staff and state legislative committee and allows us to cultivate the relationship you have established with your elected official.

**FOLLOW UP:** Be sure to maintain contact with your elected official throughout legislative session and during the interim between sessions. If you are not able to schedule additional personal visits to the legislator's office, use other methods of contact such as phone calls and emails. Take note of any questions or concerns your legislator mentioned during your meeting and try to provide additional information based on those inquiries. TRTA staff is happy to assist you in answering any queries or sending additional information about TRTA issues.

**HOW DOES ALL OF THIS ACTIVITY APPEAR TO ELECTED OFFICIALS?**

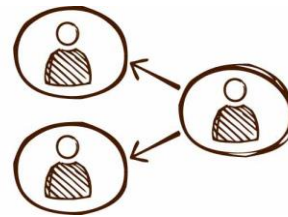
Lobbying is fair persuasion, responsible action, desired input and mutually useful. Elected officials expect to be contacted, and actually need to be contacted in order to do their job well. They may be helping you, but you are also helping them. In addition, because you are a volunteer, your opinion is more valued because you represent what you believe.

Your legislator is charged with representing all of the constituents in his or her district. Many times, they have information that you do not have. Try to understand their problems, outlooks, and objections. Never threaten political consequences.

Most controversial legislation is the result of compromise. There will be times when legislation does not go your way, so do not be too critical. Remember that you can simply not agree. Be wary of public criticisms of your legislator. Some legislators can be persuaded in the final vote to vote your way. It is much more effective to sit down in private to discuss the issue and a legislator's vote.

TRTA does not endorse candidates for office and does not have a PAC (political action committee). As an organization, we strive to work with all elected officials for the best outcomes for all TRS annuitants. Using the aforementioned guidelines will help you become a better advocate.

*Develop a member network.  
Volunteer for the local legislative committee.*



## LEGISLATIVE SESSION COMMUNICATION TIPS

**STATE LEVEL:** TRTA has an Executive Director, a contracted lobbyist, several contracted consultants, a volunteer legislative coordinator and dedicated staff members for legislative issues. They represent the association at every major legislative meeting and hearing at the Capitol. The TRTA State Legislative Committee members have scheduled day(s) at the Capitol during the session. The State Legislative Committee is divided into groups that will visit the Capitol and meet with Representatives and Senators. The committee members represent our members' legislative priorities and will advocate for any bills that address TRS issues.

**LOCAL AND DISTRICT LEVEL:** The most important and effective advocacy effort occurs at the **local level in the Representatives' and Senators' district offices.** Your visits to the district offices to discuss issues that affect education retirees and ask for their support on TRTA bills has been very effective. This should continue for the rest of the year. Information will be posted on the TRTA web site.

**TELEPHONE CALLS:** Phone calls are **VERY** important. Always 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.

**LETTER: Handwritten one-page letters (no form letters)** are very effective. Remember to **stay on message.** Ask the Representative/Senator for active support. If you ask your legislator to vote FOR or AGAINST a bill, be prepared to defend your position. (See sample letter on page 15)

**EMAIL:** Emails have become an effective way to communicate with a legislator's office staff. Still, stay on the 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 [trta.org/the-inside-line](http://trta.org/the-inside-line).**

**TELEPHONE CALLS and handwritten letters ARE THE MOST EFFECTIVE.** During the previous session, our calls completely overpowered the 800 number (888.674.3788) at the Capitol. The message recorders were filled to capacity, and the email boxes were filled. **This works!**

**SOCIAL MEDIA:** We must use **ALL** of our current methods for effectively communicating with our elected officials. The use of **Facebook, Twitter,** and other forms of social media is a must. When visiting with the staff of Representatives and Senators, ask if they are using these sources of communication. If so, use them! It can be quick, efficient and effective!

For association updates, you can follow:

TRTA Facebook page: <http://www.facebook.com/TexasRetiredTeachers>

TRTA Twitter feed: [twitter.com/TRTA](https://twitter.com/TRTA)

TRTA YouTube channel: [youtube.com/theTRTAtv](https://youtube.com/theTRTAtv)

## SAMPLE LETTER

Dear Senator/Representative (name) \_\_\_\_\_,

Thank you for your service to the state of Texas. I know that representing all of the constituents of this district is a great responsibility.

My name is \_\_\_\_\_. I am a registered voter and a retired teacher. I am very interested in maintaining the Teacher Retirement System of Texas (TRS) for current and future retirees.

TRS is a well-managed, cost-effective system for the taxpayers of this state. While pension programs in other states may have serious problems, TRS Texas does not. I am asking for your support to:

1. maintain the TRS defined benefit plan;
2. protect and support the changes in the contribution rate changes for the TRS Pension Fund made during the 86<sup>th</sup> Legislative Session through Senate Bill 12; and
3. continue the plan for making the system actuarially sound for the future while providing for much needed cost-of-living adjustments for retirees.

I am also asking for your support of the TRS-Care health insurance program. Health care is the number priority of retirees. TRS-Care participants pay premiums, co-pays, and out-of-pocket expenses. This benefit is not given to us by the government. TRS-Care has faced significant shortfalls over the past several biennia. In 2017, this resulted in major program changes and premium increases for retirees living on fixed incomes.

The program will continue to face imminent shortfalls if nothing is done to improve base funding for the program. Retirees, who live with no guarantee of receiving a raise, cannot afford to bear additional costs to maintain TRS-Care. Please help repair this much needed and very valuable health care program! Please raise the base funding for this vital program.

Our retirees give back to their local communities. We support the local economy with our pension income, generating millions in state revenues. When we began teaching, we knew our salaries would be low but that our pensions would be there when we retired. We appreciate the benefits we receive from TRS and need your support to maintain them for the long-term.

Thank you again for your service and for your support of these issues.

Respectfully,

Name, Address, Phone number, Email

# LEGISLATIVE PARTICIPATION

## GOLDEN RULES FOR GRASSROOTS INVOLVEMENT

Legislators are most interested in their **constituent** opinions. **Therefore, the most effective communication comes from local chapters that hold their legislators accountable.** The following suggestions can be useful in assuring local members are heard.

### 1. Stay well informed

- The *Inside Line* is used to keep members up to date. Please encourage your local members to sign up for this wonderful feature ([trta.org/the-inside-line](http://trta.org/the-inside-line)). Be sure to read *The VOICE* you receive each quarter and keep it as a reference. You may consider making copies of articles or fact pages printed in *The VOICE* to take with you to your visits with legislators.

### 2. Put someone in charge

- Develop a member network. Use a telephone committee for quick response as well as an email list. As alerts are sent, especially during session, have a plan ready to activate your local members into action. All local members should be participants in your plan. Legislators note the number of contacts that are made on a particular issue by their constituents. The person organizing this should be your local chapter's legislative chair.

### 3. Set up an appointment

- It is important to first try and meet with your legislator in his or her district office. It is best to take no more than three to four members to your appointment. Your time will be limited, so get to the point. Discuss your concerns with accurate facts. It might help to have a written document outlining your points to leave with the legislator. Be sure to thank the legislator and let them know that you will be contacting them again during the session. Let TRTA know that you have had a meeting so that a follow up can be made during session or sooner. Having a bill number is important during the legislative session.

### 4. Get personally acquainted

- Make sure that your members get to know their Senator, Representative and their staff as well as candidates running for office. Take a sincere interest in your legislators by attending their events. They need to know of your community involvement and that you want your issues addressed. Discuss TRTA priorities and be prepared to answer questions. If you do not know the answer, tell the legislator that you will find out and get back to them.

## 5. Send letters and emails

- When writing a letter, please reference only one bill. Be sure to place the bill number at the top of your letter. Present your issue logically and use facts. Emotional appeals usually do not influence a vote. Use background material provided by TRTA (fact pages from *The VOICE*, for example). Give facts and opinions concerning the effects of a particular measure on public school retirees.
- The importance of contacting a legislator on time cannot be overemphasized. The most eloquent letter does no good if it arrives after a vote. Using email is a great way to send your message quickly. Email addresses for Texas legislators are configured as such: [firstname.lastname@house.state.tx.us](mailto:firstname.lastname@house.state.tx.us) or [firstname.lastname@senate.state.tx.us](mailto:firstname.lastname@senate.state.tx.us). You might also call your legislator's office and ask for the email address of the staff member that works on retirement issues.

## 6. Vote!

- Although TRTA does not endorse candidates for political office, we do encourage our members always to exercise their right to vote. Opportunities to vote include primary elections, run-offs, and general elections. As an organization, our political power lies in the strength of our members. Use your voice to vote for the candidates you believe are representing your interests. Do not assume that your neighbors, colleagues or fellow TRTA members are voting. Your vote counts!

## 7. Understand your influence

- The strength of our organization lies in your decision to be involved. TRTA becomes stronger by encouraging other TRS annuitants to get involved. The more we are seen and heard, the stronger we become. Joining a local chapter or encouraging other TRS retirees to join local chapters is a great way to grow our influence.



## USEFUL WEBSITES

These websites are useful when researching legislative topics (including the defined benefit vs. defined contribution debate), Texas legislators, and U.S. Congressmen.

### Texas Legislature Online

[www.capitol.state.tx.us](http://www.capitol.state.tx.us)  
(mobile: <http://www.txlegis.com>)

### House Research Organization

<http://www.hro.house.state.tx.us>

### Senate Research Center

<http://www.senate.texas.gov/src.php>

### Texas Pension Review Board

[www.prb.state.tx.us](http://www.prb.state.tx.us)

### Secretary of State

[www.sos.state.tx.us](http://www.sos.state.tx.us)

### Legislative Budget Board

[www.lbb.state.tx.us](http://www.lbb.state.tx.us)

### Library of Congress THOMAS

<http://thomas.loc.gov>

### National Institute on Retirement Security

[nirsonline.org](http://nirsonline.org)

### GovTrack (Members of Congress, etc.)

[www.govtrack.us/congress/members](http://www.govtrack.us/congress/members)

## TRTA Sites and Social Media

### Texas Retired Teachers Association

[www.trta.org](http://www.trta.org)

### TRTA Twitter feed

[twitter.com/TRTA](https://twitter.com/TRTA)

### Taxpayers for Common Sense

[www.taxpayer.net](http://www.taxpayer.net)

### Legislative Reference Library

<http://www.lrl.state.tx.us>

### Texas Public Policy Foundation

[www.texaspolicy.com](http://www.texaspolicy.com)

### Economic Policy Institute

[www.epi.org](http://www.epi.org)

### Center for Public Policy Priorities

[www.cppp.org](http://www.cppp.org)

### Texas Tribune

[texastribune.org](http://texastribune.org)

### Laura and John Arnold Foundation

<https://www.arnoldventures.org/>

### Texas Educators Vote

<http://texaseducatorsvote.com/>

### Raise Your Hand Texas

[www.raiseyourhandtexas.org/](http://www.raiseyourhandtexas.org/)

### TRTA Facebook page

[www.facebook.com/TexasRetiredTeachers](https://www.facebook.com/TexasRetiredTeachers)

### TRTA YouTube channel

[www.youtube.com/user/TheTRTATV](http://www.youtube.com/user/TheTRTATV)



*TRTA Facebook,  
Twitter, Youtube—  
regular updates!*