

TEXAS RETIRED TEACHERS FOUNDATION



**DISTRICT FOUNDATION LIAISON
AND
LOCAL CHAPTER FOUNDATION REPRESENTATIVE
RESOURCE GUIDE
*2022-2023***



Texas Retired Teachers Foundation

313 E. 12th Street, Suite 220, Austin, TX 78701
512.476.1622 ▪ 1.800.880.1650 ▪ 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
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The TRTF Resource Guide is updated frequently. For the most recent version, please visit www.trtf.org or contact us at 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 TRTF Senior Operations and Programs Advisor Sarah Richardson (sarah@trta.org).
- Provide donation cards and/or brochures to local chapter 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 chapter 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. 12th 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.
- 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 five charitable programs: Beginning Teacher Scholarships, Classroom Assistance Grants, "A Helping Hand," Disaster Relief, and the TRTF Tutor Program. 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."

Beginning Teacher Scholarships are awarded to college seniors and first-year educators to reimburse the applicant for certification tests and classroom materials. **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. **Disaster Relief** provides public education retirees with financial assistance for a short-term hardship due to a disaster. Recipients include anyone who is eligible to receive an annuity from the Teacher Retirement System of Texas. **TRTF Tutor Program** provides public education retirees the opportunity to make additional income without penalty to their annuity.

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 \$95,000! 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 also be made through the TRTF website www.trtf.org/donate.



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Board of Trustees 2022-2023

Mary Nell Short, Board President

Carla Meuth, Vice-President

Mollye Long, Secretary-Treasurer

Bill Barnes

Maridell Fryar

Elva Garcia

Lynn Granzin

Mary Jane Hamilton

Jesse Ramos

Brenda Ritter

(Note: Officer elections are held yearly at TRTF's annual meeting in April)

For questions, suggestions, or brochures
please contact Sarah Richardson at
1-800-880-1650 or help@trtf.org.

The **TRTF website** is updated
frequently to answer your questions: 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 12th 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 12th 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 12th 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 recent college graduates who will soon begin teaching in a Texas classroom for the first time, and grants for public school teachers to meet

classroom needs.

TRTF launched a pilot version of its 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 \$215,000 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 was a momentous achievement for TRTF and TRTA!

TRTF created the Beginning Teacher Scholarship program to replace its Student Scholarship program in 2017. The program provided 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 64th 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 disasters occur in Texas in the future.

In October 2020, TRTF launched its first ever Tutor Program with our corporate partner and online platform, JoinKnack.com. Through this program, retired Texas educators can earn additional income without penalty to their TRS annuity.

The Board of Trustees, TRTA Executive Director Tim Lee, and TRTF Senior Operations and Programs Advisor 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**
 - *Accepting applications for Beginning Teacher Scholarships and Classroom Assistance Grants (applications due by the end of January)*
- **February**
 - *Recipients of scholarships and grants announced*
- **March or April**
 - *TRTA Convention or Day at the Capitol*
 - TRTF Annual Meeting, including election of Board of Trustees officers
 - TRTF Annual Spring Fundraiser
- **March-July**
 - *TRTF delivers grant and scholarship checks when possible, public relations "tour"*
- **August**
 - *Training materials for Fall conferences are updated and available on the TRTF website*
- **September-December**
 - *Fall meetings are often designated by local chapters 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 chapters 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*



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TRTF Talking Points

(For use at district and local chapter meetings; choose the points that apply most to your chapter 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 \$850,000 to educators across Texas since 2008? Please help us make a difference in the lives of educators by supporting Foundation Month!
 - a. November 2022 has been designated by the TRTA Board of Directors as Foundation Month.
 - b. TRTF is asking all TRTA local chapters 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 3rd quarter issue of *The VOICE*.
 - d. Last year, \$105,000 in donations were received from this fundraising effort!
 - e. This year, TRTF hopes to reach and pass that amount!
 - f. The Foundation's 2022-2023 goals:
 - i. TRTF will provide 20 \$750 Beginning Teacher Scholarships to college seniors and first-year educators to reimburse the applicant for certification tests and classroom materials. TRTF has awarded \$138,750 in scholarship funds since 2008.
 - ii. TRTF will provide 30 \$750 Classroom Assistance Grants to public school teachers in Texas in 2023. Since 2008, TRTF has awarded \$154,500 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 for download by September 16, 2022.
 - iv. TRTF will provide \$30,000 in grants to retirees in critical need through the "A Helping Hand" program in 2023. TRTF has provided more than \$215,000 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 the Spring of 2021, TRTF raised over \$165,000 to assist retired Texas school personnel who were negatively affected by winter storm Uri that struck Texas in February and distributed 663 Disaster Relief grants in aid.
 - 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,” Disaster Relief, TRTF Tutor Program, and the Lehr-Pritchard Endowment 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. 12th Street, Suite 220
Austin, TX 78701
 - b. Members can also donate online through the TRTF website (www.trtf.org/donate).

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 Chapter Representatives and District Liaisons

- III. It is important that every local chapter 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 a Resource Guide to help representatives and liaisons. Email help@trtf.org to request one.
 - c. 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 (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 \$215,00 in grants to 215 retirees.
 - b. Applications can be requested by contacting the TRTF office at 1.800.880.1650 or sending an email to help@trtf.org. **PLEASE NOTE:** Application materials are NOT posted online.
 - c. Local chapter 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 pay for medical and dental bills, home and auto repair, groceries, prescriptions, hearing aids, and refrigerators.
 - 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, please visit: <https://www.hhs.texas.gov/providers/long-term-care-providers/area-agencies-aging-aaa>.

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 college seniors and first-year educators to reimburse the applicant for certification tests and classroom materials. The Foundation will award 20 \$750 scholarships in 2023.
- b. Applications will be available on the TRTF website by September 16, 2022 and are due January 27, 2023.

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 30 \$750 classroom assistance grants to public school teachers in Texas in 2023.
- b. Applications will be available on the TRTF website by September 16, 2022 and are due January 27, 2023.



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TRTF Tutor Program 2022

In October 2020, TRTF launched its first ever Tutor Program with our corporate partner and online platform, JoinKnack.com.

Due to recent legislative funding and policy changes, the Texas Retired Teachers Foundation (TRTF) now offers in-person and online tutoring opportunities with Texas school districts in partnership with the Texas Education Agency (TEA). TRTF is now an approved vendor serving Texas school districts through TEA's High Impact Tutoring Program.

If you are a retiree who is interested in helping our Texas students recover from COVID-19 learning loss and putting some extra money in your pocket, please visit www.trtf.org/tutor to learn more or trtf.joinknack.com to register. You do NOT need to be a member of TRTA to register as a tutor with this program.

Paid tutor positions with our Texas ISD's are plentiful! You can help students and schools while making additional income, with no penalty to your TRS annuity. In addition, with a few exceptions, there is no limit to the number of hours you may work per month. *Contact TRS if you are working in more than one position, retired after January 1, 2021, or are a disability retiree.*


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/donate or mail a check to the address listed above.



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Foundation Donation Cards



**TEXAS RETIRED TEACHERS FOUNDATION
DONATION CARD**

Your donation will provide resources for retired TRS annuitants, as well as active and beginning teachers!

Please accept my gift of \$_____

Donor's Name _____

Donor's Address _____

This is in *memory of* or in *honor of*
(circle one) _____

Please notify their family of my donation
at this address _____

Donations are tax deductible.

Please detach this card and mail to:
Texas Retired Teachers Foundation (TRTF)
313 E. 12th Street, Suite 220
Austin, Texas 78701



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Foundation Brochures



Call 1.800.880.1650 or email 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

Phone:

512.476.1622 or 1.800.880.1650

Email:

help@trtf.org

sarah@trta.org

Website:

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Address:

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