

TEXAS RETIRED TEACHERS FOUNDATION



**DISTRICT AND LOCAL CHAPTER
FOUNDATION LIAISON**

RESOURCE GUIDE

2023-2024



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 Resource Guide

What Will You Find in this Resource Guide?

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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.

What You Need to Know as a TRTF Liaison

Texas Retired Teachers Foundation (TRTF) is...

The charitable partner 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 Resource Guide.

TRTF's Mission is...

To provide resources for retired TRS annuitants, as well as active school personnel.

There is a Dire Need for TRTF because...

Texas ranks second to last in teacher retirement benefits when compared to all 50 states plus Washington D.C., according to a new study from Equable, a bipartisan organization that monitors pension programs across the country.

TRTF's Charitable Programs are...

First-Year Teacher Scholarships, Classroom Assistance Grants, "A Helping Hand," and Disaster Relief. These programs enable TRTF to support retired, current, and future educators.

TRTF also supports the Lehr-Pritchard "A Helping Hand" Endowment Fund to raise revenue for the long-term financial support of the "A Helping Hand" program.

First-Year Teacher Scholarships provide funds to assist the recipient in purchasing materials for his or her first-year classroom. **Classroom Assistance Grants** are awarded to public school teachers who demonstrate a daily commitment to public education and Texas students through the creation of programs, events, or other learning platforms, which go beyond the basic curriculum. **"A Helping Hand"** provides public education retirees with financial assistance for a one-time special need or short-term hardship. Recipients must be receiving an annuity from the Teacher Retirement System of Texas (TRS). **Disaster Relief** provides retired and active public-school personnel 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 (TRS).

What You Need to Know as a TRTF Liaison Continued...

TRTF Support Comes From...

Donations! For example, if every member of TRTA donated just \$1, TRTF would raise over \$95,000! The Foundation makes a significant difference in the lives of many students, educators, and retirees thanks to the generosity of TRTF donors.

Anyone can be a TRTF donor! For example, local business owners, professional organizations, social groups, corporations, and TRTA members and families.

Donations Can Be Made By...

Sending 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 to any of the Foundation's charitable programs or to the Lehr-Pritchard "A Helping Hand" 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 at www.trtf.org/donate.**

What You Need to Do as a TRTF Liaison

The Foundation Liaison should:

- Promote the mission and 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 liaison feels uncomfortable answering may be directed to TRTF Senior Operations and Programs Advisor Sarah Richardson (Sarah@trta.org).
- Promote special programs and events about TRTF at local chapters during November.
- Provide donation cards and/or brochures to local chapter members as needed. If the liaison 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.
- Provide the donor(s) a donation card (see enclosed). A donor(s) may submit the donation and information specifying the donor's name, address, and phone number, as well as whether the donation is being made in honor or in memory of someone. The donor(s) can designate a specific Foundation program.
 - All donations should be sent 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. Donations may also be made through the TRTF website at www.trtf.org/donate.
 - TRTF will send acknowledgements and receipts to donors. For questions about donations that have been made, please contact Sarah Richardson.
- Assist as needed in facilitating applications for Foundation programs.



Texas Retired Teachers Foundation

313 E. 12th Street, Suite 220, Austin, TX 78701
512.476.1622 ▪ 1.800.880.1650 ▪ help@trtf.org

Board of Trustees 2023-2024

Mary Nell Short, Board President

Carla Meuth, Vice-President

Mollye Long, Secretary-Treasurer

Bill Barnes

Nancy Byler

Maridell Fryar

Elva Garcia

Mary Jane Hamilton

David Olivas

Jesse Ramos

Brenda Ritter

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.

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 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 \$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 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 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. The program was modified in June 2023 and renamed First-Year Teacher Scholarship, focusing on first-year teachers.

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. In 2021, over \$165,000 in aid was given to both retired and active educators due to winter storm Uri. 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 its corporate partner and online platform, JoinKnack.com. Through this program, retired Texas educators were able to earn additional income without penalty to their TRS annuity. With the proliferation of other private tutoring programs, TRTF discontinued this program in December 2022.

The Board of Trustees, 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.

TRTF Annual Calendar of Events

- **January**
 - *Applications accepted for First-Year Teacher Scholarships and Classroom Assistance Grants (applications due by the end of January).*
- **February**
 - *Scholarship and grant applications reviewed by appointed committees.*
- **March**
 - *Recipients of scholarships and grants announced.*
- **April**
 - *TRTA Convention or Day at the Capitol*
 - TRTF Annual meeting, including election of Board of Trustees officers.
 - TRTF Annual Spring Fundraiser
- **May-July**
 - *TRTF delivers scholarship and grant 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.*
 - *First-Year Teachers 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.*

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 \$910,000 to educators across Texas since 2008? Please help us make a difference in the lives of educators by supporting Foundation Month!
 - a. November 2023 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, \$111,000 in donations were received from this fundraising effort!
 - e. This year, TRTF hopes to reach and pass that amount!
 - f. The Foundation's 2023-2024 goals:
 - i. TRTF will provide up to 35 \$1,000 First-Year Teacher Scholarships. This scholarship is to provide funds to assist the recipient in purchasing materials for his or her first-year classroom. TRTF has awarded \$155,250 in scholarship funds since 2008.
 - ii. TRTF will provide up to 30 \$1,000 Classroom Assistance Grants to public school teachers who demonstrate a daily commitment to public education and Texas students through the creation of programs, events, or other learning platforms which go beyond the basic curriculum. TRTF has awarded \$177,000 in grants since 2008.
 - iii. Applications for the First-Year Teacher Scholarship program and the Classroom Assistance Grant program will be available on the TRTF website www.trtf.org for download by September 15, 2023.
 - iv. TRTF will provide \$25,000 in grants to retirees in critical need through the "A Helping Hand" program in 2024. TRTF has provided more than \$240,000 in grants to retired educators since 2010.
 - v. TRTF will provide limited grants through the Disaster Relief Fund. We will continue to raise funds for this program to stand ready for the next disaster. Over \$375,000 in aid has been awarded to 1,100 active and retired school personnel to assist with emergency needs due to ice storms, tornadoes, wildfires, and hurricanes.
 - vi. TRTF will continue to raise funds for the Lehr-Pritchard "A Helping Hand" 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: First-Year Teacher Scholarships, Classroom Assistance Grants, “A Helping Hand,” as well as the Lehr-Pritchard “A Helping Hand” Endowment Fund and Disaster Relief.
 - a. There is a dire need for TRTF’s charitable programs.
 - b. 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
 - c. Members can also donate online through the TRTF website (www.trtf.org/donate).

Types of contributions

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

Why we need District and Local Chapter Liaisons

- III. It is important that every local chapter designate a person to serve as their Foundation Liaison.
 - 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 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 with critical, emergency need by providing grants. The program has provided over \$240,00 in grants since 2010.
- 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. 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 (AAA) 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. The AAA directory can be found at <https://apps.hhs.texas.gov/contact/aaa.cfm>.

V. *First-Year Teacher Scholarships*

- a. (Formerly Beginning Teacher Scholarships) The First-Year Teacher Scholarship program provides funds to assist the recipient in purchasing materials for his or her first-year classroom. The Foundation will award up to 35 \$1,000 scholarships in 2024.
- b. Applications will be available on the TRTF website by September 15, 2023, and are due January 26, 2024.


VI. *Classroom Assistance Grants*

- a. Classroom Assistance Grants are awarded to public school teachers who demonstrate a daily commitment to public education and Texas students through the creation of programs, events, or other learning platforms, that go beyond the basic curriculum. TRTF will provide up to 30 \$1,000 grants to public school teachers in Texas in 2024.
- b. Applications will be available on the TRTF website by September 15, 2023, and are due January 26, 2024.

VII. *Disaster Relief*

- a. Provides retired and active public-school personnel with financial assistance for a short-term hardship due to a disaster. Recipients include anyone who is eligible to receive an annuity from the Teachers Retirement System of Texas (TRS).
- b. More than \$375,000 in aid has been awarded to over 1,100 retired and active school personnel to repair damage caused by flooding, fire, tornadoes, and other emergencies.

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 _____

Please check the following if you would like to designate your donation to a specific Foundation program:

- "A Helping Hand"
- Disaster Relief
- Classroom Assistance Grants
- Beginning Teacher Scholarships
- Lehr-Pritchard Endowment Fund

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

Please notify their family of my donation at this address _____

Save TRTF a stamp and email acknowledgement to:

Donations are tax deductible. Please detach this card and mail to: **Texas Retired Teachers Foundation (TRTF)**
313 E. 12th Street, Suite 220 • Austin, TX 78701

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

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Website:

www.trtf.org

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