

Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org

Foundation Liaison & Representative Training Guide

What Will You Find in this Training Guide?

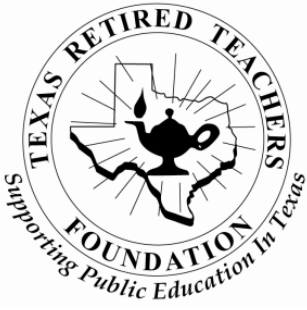
- I. Foundation Liaison & Representative Roles & Responsibilities
- II. Frequently Asked Questions
- III. A Brief History of the Texas Retired Teachers Foundation
- IV. TRTF Annual Calendar of Events
- V. TRTF Talking Points
- VI. Donation Cards
- VII. Brochures (available by request)

The TRTF Training Guide is updated frequently. For the most recent version, please visit <http://www.trtf.org/index.cfm/resources> or contact us at info@trtf.org, subject: Training Guide.

Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701

512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org



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 Outreach Specialist Cindee Sharp. (see Talking Points for additional info)
- Provide donation cards and/or brochures to local unit members as needed. If the representative does not have any donation cards or brochures, he or she may contact Cindee Sharp to request them.
- Accept donations from local unit members or other people in the community. Donors should provide the representative with either a donation card (see enclosed) or a sheet of paper specifying the donor's name, address, and phone number, as well as whether or not the donation is being made in honor or in memory of someone. **NOTE:** All donations should be forwarded immediately to the Foundation office at 313 E. 12th St., Ste. 200, Austin, TX 78701. Checks should be made out to the Texas Retired Teachers Foundation. TRTF will send acknowledgements and receipts to donors.
- 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.



Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org

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 or at <http://www.trtf.org/history.htm>.

What is the mission of TRTF?

The Texas Retired Teachers Foundation is non-profit organization providing resources and programming that contribute to an enhanced quality of life for retired Texas teachers and school personnel.

What are TRTF's charitable programs?

TRTF supports four charitable programs: student scholarships, classroom assistance grants, "A Helping Hand," and the Legacy Campaign. These programs enable TRTF to support retired, current, and future educators.

Student scholarships are awarded to education majors attending Texas colleges or universities. All recipients must be relatives of a TRTA member. Classroom assistance grants are awarded to public school teachers who demonstrate a daily commitment to public education and Texas children through the creation of programs, events or other learning platforms. "A Helping Hand" provides public education retirees with financial assistance for a one-time special need or short-term hardship. Recipients include anyone who is eligible to receive an annuity from the Teacher Retirement System of Texas. The Legacy Campaign provides factual resources about defined benefit retirement plans, and supports a positive image of public education and current and retired school personnel in Texas.

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 \$70,000! If every member of TRTA donated \$2, that amount would double to \$140,000! 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. 200, 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 four charitable programs and may give a gift in memory or honor of a loved one. Other methods of donating are described in detail at <http://www.trtf.org/index.cfm/giving/ways-to-give>.



Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org

Frequently Asked Questions continued...

Board of Trustees 2011-2012

Tom Pritchard, Board President
Dr. William "Corky" Pence, Vice-President
La Vonne Rogers, Secretary-Treasurer
Carlos Ortiz
Carolyn Lance
Mike Lehr
Robert "Bob" Richards
John Krodel
Dr. Kenneth Laycock, Board Adviser

For questions, suggestions, or brochures
please contact Cindee Sharp (Outreach Specialist) at
1-800-880-1650 or info@trtf.org.

The **TRTF website** is frequently
updated to answer your
questions: www.trtf.org.



Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@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. This financial structure prevails until the partnership ends in 2029. At that time, the Foundation will own 100 percent of the building and TRTA will own the lot.

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 \$21,000 in assistance to date.

In November 2011, TRTF began its newest venture, the Legacy Campaign. The purpose of the Legacy Campaign is to raise funds for developing factual resource materials about defined benefit pension plans and the value of the Teacher Retirement System of Texas. Additionally, the campaign will promote a positive image of public education in Texas, with an emphasis on appreciating the legacy of our retired and current school personnel.

The Board of Trustees, TRTA Executive Director Tim Lee, and Outreach Specialist Cindee Sharp work diligently to enhance the foundation's programs. We welcome your suggestions to improve the lives of education retirees.



Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org

TRTF Annual Calendar of Events

- **January/February/March**
 - *Accepting applications for Student Scholarships and Classroom Assistance Grants (applications due mid-March)*
- **April**
 - *TRTA Annual Convention*
 - TRTF Annual Meeting, including election of Board of Trustees officers
 - TRTF Training Session
 - TRTF Annual Luncheon
 - Recipients of scholarships and classroom grants announced
- **May-September**
 - *TRTF delivers grant and scholarship checks when possible, public relations “tour”*
- **September-December**
 - *Fall meetings are often designated by local units as a time to raise awareness of the Foundation and host a local fundraising campaign*
- **November**
 - *Foundation Month & Annual Appeal Letter*
 - Local units not meeting in November designate Foundation month earlier or later than November; however, the TRTF state office sends its Annual Appeal letter to all members of TRTA in November
- **December**
 - *Fundraising totals will be announced*
 - *Scholarship and grant applications for the upcoming year will become available at this time*

(Please note that “A Helping Hand” applications are accepted throughout the year and may be submitted for consideration at any time. It is possible grants for this program may not be awarded at certain times of the year if funds are not available).



Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org

TRTF Talking Points

- I. November 2011 was designated by the TRTA Board of Directors as Foundation Month.
 - a. The purpose was to increase awareness of the foundation, including recent accomplishments and goals for the coming year.
 - b. The Foundation's 2012 goals include:
 - i. 10 \$500 student scholarships
 - ii. 10 \$500 classroom assistance grants
 - iii. Providing at least \$10,000 in grants to retirees in critical need through the "A Helping Hand" program in 2012
 - iv. Creating factual resource materials from funds raised through the Legacy Campaign, including documents, video clips, and a website
 - c. TRTF asked districts and local units to participate in Foundation Month by sharing talking points at meetings as well as raising donations for the foundation
 - i. As of January 2012, local units and districts have donated nearly \$24,000
 - ii. Combined with donations from individuals, TRTF has raised \$72,000 since November 1st
 - iii. Our goal through the Legacy Campaign is \$85,000! We are only \$13,000 away from meeting our goal!
 - iv. All TRTA members received an annual appeal letter from the Foundation in November to coincide with Foundation Month. This letter promotes our newest venture: the Legacy Campaign.
 1. The Legacy Campaign will help us raise funds to create factual materials about the value of the TRS defined benefit plan and the important legacy of our Texas retired school personnel.
 2. The Foundation is partnering with TRTA in this campaign to develop educational documents, videos, and a website.
- II. It is important that every local unit designate a person to serve as their Foundation Representative.
 - a. This person should have a computer and an email address, as most correspondence sent by the Foundation is through email. This helps the Foundation reduce costs and use funds for charitable programs.
- III. TRTF has a monthly electronic newsletter available by email entitled *The Ledger*
 - a. TRTF needs updated email addresses for all district and local unit presidents, as well as foundation liaisons and representatives. Please contact Cindee Sharp to sign up (info@trtf.org).
- IV. The 2012-2013 Student Scholarship and Classroom Assistance Grant applications are ready!

- a. You may visit our website, www.trtf.org, to download an application (see the Scholarships and Grants tab)
 - b. You may request an application via email at info@trtf.org
 - c. You may request a hard copy by calling Cindee at 1.800.880.1650 ext 107.
 - d. The deadline to submit applications is February 23, 2012.
- V. The 2011 Student Scholarship and Classroom Assistance Grant recipients were announced at the 58th Annual TRTA Convention during the Foundation Luncheon on April 14, 2011. Following is a list of recipients. For more detailed information, please visit our web site at www.trtf.org.
- a. Last year's scholarship recipients were:
 - i. Bailey Long, related to Barbara and James Williams, members of the Collingsworth County RTA.
 - ii. Kristina Owen, related to Elizabeth Ellis of Bangs, a member of Brown County RTA.
 - iii. Jonathon Williamson, related to Sherry and Charles Bradberry of San Augustine, both at-large members of TRTA.
 - iv. Madilyn Shults, related to Floyd and Janice Sackett of the Pampa RTA.
 - v. Savannah Jones, related to Easton Wall, a member of the San Angelo RTA.
 - vi. Shanna Scarborough, related to Jack and Barbara Jordan of Taylor, both at-large members of TRTA.
 - vii. Brianna Bonnette, related to Billy Hall of the Smith County RTSPA.
 - viii. Jennifer Cox, related to Bonnie Longnion of Kingwood, a member of Humble Area RTA.
 - ix. Lauren McManus, related to Barbara J. Lopez, an at-large member of TRTA from Waxahachie.
 - x. Carlee Black, related to Barbara Pellet of Forestburg, Texas, an at-large member of TRTA.
 - b. Last year's classroom assistance grant recipients were:
 - i. Jim Heston, a videography teacher from G.W. Carver magnet middle school in Waco.
 - ii. Shannon Miller, a veterinary medicine teacher from R.L. Turner High School in Carrollton.
 - iii. Katherine Cantu-Sickle, a 2nd through 5th grade science teacher from Beacon Hill Elementary in San Antonio.
 - iv. Justin Harper, a criminal justice teacher at Jack E. Singley Academy High School in Irving.
 - v. Lori Mensing, a third grade math and science teacher at Delaney Elementary in Kennedale.
 - vi. Barbara Harris, a 3rd through 5th grade math teacher at Irving Elementary in Cleburne.
 - vii. Jerry Richey, a welding, architecture, and construction teacher at Waelder High School.
 - viii. Megan Kunkel, a science lab teacher at Anthon Elementary in Uvalde.
 - ix. Sandra Ramirez with Dancie Fulmer, both teachers at Patton Springs ISD in Afton.

- x. Kayla Turner, a veterinary medicine teacher at Cypress Springs High School in Cypress.
- VI. The 59th Annual TRTA Convention will be held in Houston March 25-27, 2012.
 - a. TRTF will host its annual luncheon on March 26 at 12:15 p.m.
 - i. Attendees will hear updates about all of TRTF's programs, including "A Helping Hand" and the Legacy Campaign.
 - ii. TRTF Scholarship and Grant winners will also be announced.
 - iii. A special donation card for use at the luncheon will be made available in the January, February and March issues of *The Ledger*. Persons wishing to make a donation during the luncheon in honor or in memory of a friend or loved one may use this donation card to have their gift announced.
 - b. TRTF will host a training session on March 26 for Foundation representatives and liaisons during the third breakout hour, which begins at 4:00 p.m.
- VII. TRTF has a Training Guide for Foundation liaisons and representatives (email Cindee at info@trtf.org to request one or download one from the website www.trtf.org on the Resources page).
- VIII. Foundation brochures are available and may be requested by calling Outreach Specialist Cindee Sharp at 1-800-880-1650 ext 107.
- IX. Donations:
 - a. Donations are needed to support our four programs: Student Scholarships, Classroom Assistance Grants, "A Helping Hand," and the Legacy Campaign.
 - b. How to donate (donation cards are available in the foundation brochure; in *The VOICE*; and online through the TRTF website using a feature called JustGive.org)
 - c. Donors may designate funds for a specific purpose (any of the four programs)
 - 1. Donors may also give a gift in memory or in honor of someone.
 - d. All donations will be acknowledged by the Foundation office.
 - e. Simple, cost-effective fundraising techniques are available on the TRTF website should your district or local unit choose to raise money for TRTF during the year.
- X. Progress on TRTF's newest program, "A Helping Hand:"
 - a. The purpose of "A Helping Hand" is to aid public education retirees in critical need by providing grants.
 - b. The program launched statewide in October 2010 and has provided \$19,000 in grants to retirees since that time (\$21,000 since the pilot program launched).
 - c. TRTF awarded the first "A Helping Hand" grant to Ms. Helen Jo Crump of Amarillo, Texas. TRTF paid to replace the tires on her 1990 Oldsmobile. To read Ms. Crump's story, please visit the web page www.trtf.org.
 - d. How to apply for "A Helping Hand": Local unit presidents or foundation representatives will accept applications and forward them to the TRTF office in Austin; 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. Please do not hesitate to send in applications.
 - e. 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 been provided for various needs, including but not limited to space heaters, utilities, medical and dental bills, eyeglasses, food, and a wheelchair.

- XI. What are the Foundation's plans for the future?
- a. TRTF will continue its four charitable programs: student scholarships, classroom assistance grants, "A Helping Hand" grants for retirees, and the Legacy Campaign.
 - b. Additionally, TRTF is researching opportunities to apply for grants from larger organizations and forming corporate partnerships. TRTF's vision is to become the leader in providing useful services to retired Texas teachers and school personnel.
 - c. TRTF will work closely with TRTA to continue the Legacy Campaign, creating resources that may be used by all TRTA members, TRS annuitants, and active school personnel.



Texas Retired Teachers Foundation

313 E. 12th St., Ste. 200, Austin, TX 78701
512.476.1622 x107 ▪ 800-880-1850 ▪ help@trtf.org

Foundation Donation Cards

TEXAS RETIRED TEACHERS FOUNDATION

👉 I WANT TO
HELP!

**DONATION
CARD**
DONATIONS ARE
TAX DEDUCTIBLE

Please accept my gift in memory or
in honor of (circle one):

Please accept my donation of:

\$25 \$50 \$100 \$ _____

NAME

ADDRESS

CITY

STATE

ZIP

PHONE

EMAIL

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