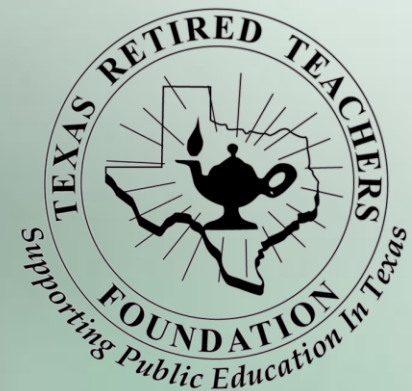


Texas Retired Teachers Foundation

Training Session

April 13, 2011

58th Annual TRTA Convention



TRTF: Mission & Vision

- **Mission:** The Texas Retired Teachers Foundation is a non-profit organization providing resources and programming that contribute to an enhanced quality of life for retired teachers and school personnel.
- **Vision:** To be recognized as a leader in providing useful services to retired Texas teachers and school personnel. To be a model for other similar foundations in the USA to emulate.





TRTF: Overview

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.
- TRTF supports three charitable programs: student scholarships, classroom assistance grants, and "A Helping Hand."

Three charitable programs:

supporting retired, current, & 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 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.



TRTF: Liaisons & Representatives

- **Liaisons:** Serve at the District level
- **Representatives:** Serve at the Local Unit level
 - Role & Responsibilities:
 - *Speak on behalf of the Foundation at functions such as local and district meetings, and answer basic questions about the activities and state of the Foundation.*
 - *Provide donation cards and/or brochures to local unit members as needed; accept donations from local unit members or other people in the community.*
 - *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*



Speaking on behalf of TRTF

Resources:

- *The Ledger*
 - *TRTF's monthly e-newsletter (email address required)*
- Talking Points
 - *May be downloaded from the trtf website (www.trtf.org)*
 - *May be shortened and/or customized to suit your needs and time constraints*

Answering basic questions about TRTF

Resources:

Training Guide (FAQ)

Website (www.trtf.org)

Annual Calendar of Events (general calendar to remind you what TRTF events may occur so that you can plan ahead)





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 Photo Booth
- TRTF Training Session
- TRTF Annual Luncheon
 - Recipients of scholarships and classroom grants announced

Calendar continued...

- **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

Calendar continued...

- **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*

Donations

- Donations may be designated for any of the Foundation's three charitable programs: student scholarships, classroom assistance grants, or "A Helping Hand"
- Donations made be made in honor or in memory of someone
- Resources:
 - *Donation cards (website: www.trtf.org)*
 - *Brochures (TRTF state office)*
 - *Copies of The VOICE*

Serving as “A Helping Hand” Representative

Statewide launch held in October 2010!

- *Did you participate in a training webinar?*
- “A Helping Hand” documents
 - *Application*
 - *Guidelines*
 - *Instructions for applicants*
 - *Instructions for you (“A Helping Hand” representatives)*



“A Helping Hand” brief training

- The purpose of “A Helping Hand”
 - *To provide public education retirees with financial assistance for a one-time special need or short-term hardship*
 - *Financial assistance is defined as a grant, not to be repaid by the individual receiving the funds*

"A Helping Hand" continued...

- Who can apply?

- *Any person who is receiving or is eligible to receive an annuity from the Teacher Retirement System of Texas (TRS)*
- *Including:*
 - *Retired educators or beneficiaries*
 - *Retired education support personnel (food service, transportation, custodial staff, etc.)*
 - *Anyone eligible for a TRS benefit who is not yet retired*
 - *Any of these who are or are not members of TRTA*

“A Helping Hand” continued...

- Grants are awarded from this program for EMERGENCY NEEDS only

Emergency need is defined as:

- *a short-term financial hardship caused by unexpected or extenuating circumstances such as natural disasters, illness, injury, accidents, or crisis that requires quick action*

- Examples:

- *Food, rent, or utilities*
- *Emergency transportation and vehicle repair*
- *Medical/dental expenses*
- *Expenses related to home repairs or vandalism*



“A Helping Hand” continued...

- What is NOT considered an emergency?

- *Examples*

- Non-essentials
- Financing vacation
- Paying fines or legal expenses
- Liquidating or consolidating debt
- Purchasing a home
- Making home improvements for aesthetic purposes only
- Covering bad checks or paying credit card bills



Emergencies must be verified

... with
qualifying
documentation

*Such as bills,
bids, collection
notices, or other
documentation
demonstrating
the financial
cost incurred by
the grant seeker*



“A Helping Hand” continued...

- How much aid may the grant seeker request?
 - *TRTF will award grants in any amount up to \$1000 per grant application*
 - *TRTF may consider grant applications in which the requested amount exceeds the \$1000 limit**

**approval of such a grant shall not set a precedent*



The applicant should indicate on the application form how much aid is needed and attach qualifying documentation (bills, bids, collection notices, etc.) to the request

“A Helping Hand” continued...

- How often may a grant seeker request aid?
 - *Applicants may request aid as many times as they wish within a calendar year; however, the awarding of an initial grant in no way implies or guarantees that a subsequent grant application will be approved*
 - **Disclaimer:** *TRTF reserves the right to deny any application that does not meet the program guidelines or that does not reflect or further the values of the Foundation as expressed in its mission.*



"A Helping Hand" continued....

How does a grant seeker apply?

- The individual in need (referred to as the **Grant Seeker**) submits the application to the Local Unit or District
- A concerned friend, family member, or citizen submits the application on behalf of the Grant Seeker to the Local Unit or District

NOTE: At times, a grant seeker may find an application online or call the TRTF state office to ask for one, and may send an application directly to TRTF.

“A Helping Hand” continued...

What is YOUR Role in the Application Process?

District Presidents/Foundation Liaisons +
Local Unit Presidents/Foundation Representatives=

TRTF's Helping Hand Representatives (HH Representatives)

- Generally, applications will be processed at the Local Unit level
- District Presidents or Foundation Liaisons should determine if the Grant Seeker is a member of a Local Unit
 - *If the Grant Seeker is not a member of a Local Unit, the District HH representative should process the application*



“A Helping Hand” continued...

What your role in the application process?

- Make applications, guidelines and instructions available to grant seekers
- Accept applications from grant seekers and verify:
 - *Application is complete (especially Section 1)*
 - *Qualifying documentation is included*
- You (HH Representative) must sign the application
- You must forward completed applications ONLY to TRTF in a timely manner
 - *Preferably via email (help@trtf.org), fax (512) 476-1003, or FedEx (TRTF, Attn: A Helping Hand, 313 E. 12th St. Ste. 200, Austin, TX 78701).*

Let's look at the application form!



The Texas Retired Teachers Foundation "A Helping Hand" Assistance Request

"A Helping Hand" assists public education retirees who require emergency assistance for a one-time special need or other short-term hardship. This form may be filled out by the grant seeker or a concerned citizen, friend, or family member of the grant seeker. Grant seekers are NOT required to be members of the Texas Retired Teachers Association, but must be eligible to receive benefits from the Teacher Retirement System (TRS) of Texas.

Complete Section 1 of the request and return to your Local Unit "A Helping Hand" Representative. For questions about your representative, please call 1-800-880-1650 or email help@trtf.org.

SECTION 1 *To be completed by the Grant Seeker*

Grant Seeker Name _____ Phone Number _____

Current Address _____ City _____ State _____ ZIP _____

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

Monthly Income of Grant Seeker (including TRS pension, SS benefits, other) \$ _____
(Please include a copy of your 1040 with your application)

Explain the nature of the emergency (If more space is needed, please attach an additional page).

Amount of Request \$ _____ Vendor/Company Name _____
(up to \$1000 in most circumstances; please see Guidelines for additional information)

Vendor/Company Phone Number _____

(Please attach all REQUIRED qualifying documentation)

SECTION 2 *To be completed ONLY if Section 1 is completed by a friend or family member of the Grant Seeker*

Name of Person Completing Application _____ Phone Number: _____

Address _____ City _____ State _____ ZIP _____

SECTION 3 *To be completed by Local Unit "A Helping Hand" Representative*

Local Unit Name _____ Phone Number _____

Address _____ City _____ State _____ ZIP _____

"A Helping Hand" Representative Name _____

"A Helping Hand" Representative Signature _____ Date _____

SECTION 4 *For Foundation office Use Only*

TRTF Representative Signature _____ Approved Denied Not Eligible
 More information required/decision pending

Date Received: _____

Date Processed: _____

Check Number: _____

"A Helping Hand" continued...

SECTION 1 *To be completed by the Grant Seeker or friend or family member of Grant Seeker*

- Grant Seeker Name _____
 - Phone Number _____
 - Current Address _____
 - City _____ State _____ ZIP _____
 - Is grant seeker receiving or eligible to receive benefits from TRS?
(Check one) YES NO
 - Monthly Income of Grant Seeker (including TRS benefits, SS benefits, other)
(Please include a copy of your 1040 with your application) \$ _____
 - Explain the nature of the emergency (If more space is needed, please attach an additional page). _____

 - Amount of Request (up to \$1000 in most circumstances; please see Guidelines for additional information) \$ _____
 - Vendor/Company Name _____
 - Vendor/Company Phone Number _____
- (Please attach all REQUIRED qualifying documentation)**

"A Helping Hand" continued...

SECTION 2 *To be completed ONLY if Section 1 is completed by a friend or family member of the Grant Seeker*

- Name of Person Completing Application _____
- Phone Number _____
- Address _____
- City _____ State _____ ZIP _____

"A Helping Hand" continued...

SECTION 3 *To be completed by Local Unit "A Helping Hand" Representative*

- Local Unit Name _____
- Phone Number _____
- Address _____
- City _____ State _____ ZIP _____
- "A Helping Hand" Representative Name _____
- "A Helping Hand" Representative Signature _____ *
- Date _____

**The signature of the "A Helping Hand" Representative indicates that to the best of the Representative's knowledge, the grant seeker has a legitimate need and the application is complete.*

"A Helping Hand" continued...

SECTION 4 *For Foundation Office Use Only*

- TRTF Representative Signature _____
 - Approved Denied Not Eligible
 - More information required/decision pending
- Date Received: _____
- Date Processed: _____
- Check Number: _____

Please do not fill out any portion of Section 4 of the application form. Immediately forward applications with sections 1, 2 (if applicable), and 3 to the Foundation Office

**FOR
OFFICE
USE ONLY**

“A Helping Hand” continued...

What happens next?



- Once the application is received by TRTF, a letter will be sent to the Grant Seeker verifying receipt of application
- A committee will review the application
 - *You may be asked to participate in a conference call when the committee discusses the application*
- If the application is approved, TRTF will forward funds directly to the vendor to whom money is owed
- All Grant Seekers will receive a letter from TRTF informing them of the final status of the application

“A Helping Hand” continued...

The importance of confidentiality

- All District Presidents/Foundation Liaisons and Local Unit Presidents/ Foundation Representatives must complete and return a **Confidentiality Agreement** to TRTF



The information provided by the Grant Seeker or by a person submitting the application on someone's behalf should remain confidential at all times, and should not be shared with anyone other than TRTF board members and staff or TRTF legal counsel

Questions & Answers . . .

Cindee Sharp

**Government Relations &
Outreach Specialist**

1.800.880.1650 | help@trtf.org



The historic walkway by the wall

