



# **TRTA: TEAMWORK IS KEY**

**THROUGH THE  
RETIREMENT EDUCATION  
COMMITTEE**

**RESOURCE GUIDE**

**2017-2018**



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



# Retirement Education



## Teamwork is Key to Retirement Education:

- Promote and provide the most current retirement education information to all active school personnel and retirees in your community.
- Encourage collaborative relationships with every superintendent and principal.
- Consider a variety of activities for presenting retirement education information.
- Recycle copies of *The Voice* to share in campus teacher's lounges.
- Attend or participate in district-wide school meetings for active personnel.
- Expand your team's contacts by adopting local schools or smaller school districts.
- Inform active school personnel of scheduled dates for TRS retirement meetings.
- Distribute TRTA information at retirement events and publicize the availability of the *Inside Line* for retirees and of *Before the Bell* for active school personnel.
- Always have flyers, cards, TRTA materials, and local enrollment forms handy.

## Prepare Your Team with the Retirement Education Resource Guide:

The new Retirement Education Committee Resource Guide may be downloaded at [www.trta.org](http://www.trta.org) under the Committees tab, 2017 Resource Guides. A variety of events and resources found in the resource guide are great for local and district use.

## Report Your Retirement Education Team's Annual Accomplishments:

- Local unit reports due to the District Chairman by February 15.
- District reports due to State Retirement Education Committee representative by March 1.
- Reports cover events from January 1 through December 31.
- Forms are available online at [www.trta.org](http://www.trta.org) under the Forms tab, Retirement Education.

## Reward Your Retirement Education Team with Achievement Awards:

- Certificates are awarded at the TRTA State Convention to districts with 100% local units reporting.
- Certificates are presented at spring district meeting to local units for outstanding events.
- Awards can be given locally to deserving members.

## **Local Unit Planning Calendar**

### **July and August**

- Designate a campus coordinator for each ISD and enlist team members to help.
- Meet with Local President and team to develop a plan and budget for retirement events. (Descriptions of different types of events & worksheets for planning provided in Resource Guide.)
- Contact superintendents and principals for permission to present information at staff meetings and to visit campuses. Secure an email address in each ISD for distribution of information.
- Contact TRTA office to place retirement events on the calendar and order TRTA materials. (Order form in Resource Guide and on the TRTA website).
- Assemble packets of handouts (Available on the TRTA website and in Resource Guide), TRTA materials, and Local and State enrollment forms for distribution at retirement events with your campus coordinator and team members.

### **Monthly**

- Conduct retirement events in months as planned.
- Visit campuses often to deliver current information on retirement issues.
- Report accomplishments at every local meeting.

### **January**

- Meet with Local President and campus committee team members to review or revise retirement events plan.
- Contact TRTA to update calendar and order more materials if required.
- Assemble more packets for distribution at retirement events if needed.

### **February**

- Send a final report for retirement activities in the previous year to your District Chairman of Retirement Education by February 15. (Form in Resource Guide or on TRTA website).

### **May or June**

- Meet with committee team members and campus coordinator to evaluate the results of this year's plan and prepare for next year. Enlist help especially from newly retired members.

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The following documents and forms are available online at [www.trta.org/retirementeducation](http://www.trta.org/retirementeducation)

- TRS–Care Fact Sheet
- Talking Points for Retirement Seminar
- Resources for a Retirement Education Event
- Key Sources for Retirement
- Flyer Sample
- Do You Know the Difference? Defined Benefit versus Defined Contribution

## Retirement Education Committee

Policy: The TRTA Retirement Education Committee shall collaborate with Districts and Local Units in developing and sponsoring retirement events for active educators, regardless of status of service, and shall promote collaboration with local school districts. The committee shall collaborate with other standing and special committees as appropriate to further the mission of TRTA.

### Suggested Activities

#### **The TRTA Local Unit Retirement Education Committee Chairmen:**

1. Provide retirement education information received from TRTA to active school personnel;
2. Plan and increase special activities such as seminars, fairs, programs and individual contact. If necessary, combine activities with several local units;
3. Assist and encourage district retirement education committee chairmen with retirement activities when appropriate;
4. Promote and provide retirement information of interest to retirees and active school personnel when appropriate;
5. Complete the retirement education report form for your unit. Submit the local unit report to your district retirement education committee chairman by due date; and
6. Communicate retirement events to appropriate sources for publication; and
7. Attend the retirement education training session at the district spring leadership training conference and if possible attend the retirement education training session at the TRTA Convention.

#### **The TRTA District Retirement Education Committee Chairmen:**

1. Be a facilitator for distributing TRTA retirement education materials to local unit retirement education committee chairmen in the district;
2. Provide information of interest for active school personnel and retirees to local unit retirement education committee chairmen;
3. Plan TRTA district activities to encourage and increase district-wide seminars, fairs, programs and individual contact;
4. Serve as resource person to local unit chairmen;
5. Promote and provide representation of TRTA and retirement information at active teacher organization events;
6. Encourage local unit retirement education committee chairmen to post events on websites;
7. Compile retirement education report forms from each local unit, tally information and submit the district annual report form to the state health care committee representative by due date;
8. Serve as trainer of the retirement education activities for local unit retirement education committee chairmen at the district spring leadership training conference; and
9. Attend the TRTA Convention retirement education training session.

#### **The TRTA State Retirement Education Committee Chairman:**

1. Develop and implement with the committee a retirement education program;
2. Identify a list of resource persons for retirement education events;
3. Work with TRTA leaders to ensure that the district committee chairmen get the support and training needed to carry out their responsibilities;
4. Gather information related to TRTA and TRS which would be of interest to retired school personnel and future retirees and send it to the district chairmen; and
5. Serve as presenter to train district and local unit counterparts at the TRTA Convention.

# Retirement Education Calendar of Planning, Dates, Meetings & Events

## July

### **Local Chairman**

- Designate a campus coordinator for each ISD and enlist members to help with visits.
- Local president and retirement education chairman meet with campus coordinators to plan items for visits.
- Contact superintendents for permission to present information at staff meetings and monthly visits.
- Contact principals for permission to visit each campus and set up at least one time to speak at a campus meeting.
- Develop a budget for events.

### **District & Local Chairman**

- Set a time and venue for a district or local retirement seminar.
- Develop a list of events for the year.

### **State Chairman**

- Schedule state, district and local unit committee meetings.
- Review resource guide with committee members.

## August

### **Local Chairman**

- Campus coordinators meet and prepare items for September campus visits. Include a few copies of the state or local unit membership form.

### **District & Local Chairman**

- Local or district speakers present TRTA information at ISD's in-service.

### **State Chairman**

- Prepare agenda for TRTA State Retirement Education Committee meeting.
- Review previous year's events, resources, minutes, and evaluations.
- Address charges from TRTA President as needed.

## September

### **Local Chairman**

- Make campus visits and deliver a publication and treats. Report on actions at the local meeting.
- Make a brief report at the local meeting of events.

### **District Chairman**

- Contact each local unit chairman and offer assistance, encourage planning of events, and forward the letter from the state chairman.

### **State Chairman & Committee**

- Prepare a September letter, provide information for retirees and actives, and email or use USPS to State Retirement Education Committee members.
- Remind members to keep address and other personal information updated with TRS. Prepare information on goals and actions for the District Fall Meeting.
- Committee members contact each district retirement education chairman and forward state chairman's letter. Offer assistance if needed.

## October

### **Local Chairman**

- Prepare items for campus visits and deliver to each building.
- Contact TRTA office to place retirement seminars on the calendar.
- Complete the "Worksheet for Planning a Retirement Education Event" in resource guide.
- Prepare for campus visits and include a copy of a TRTA publication or information sheet in each building.
- Make campus visits.
- Complete Retirement Education Event Information & Order Form for events in October-December and mail to TRTA and TRTA Retirement Education Chairman.
- Make a brief report of events and special information at local meeting.

### **State Chairman**

- Prepare and send October letter to committee members, and each district president, district chairman and local chairman.

## **November**

### **Local Chairman**

- Prepare items for campus visits and deliver to each building.
- Give a brief report of events at the local meeting.

### **District Chairman**

- Send Retirement Education District Report Form to state chairman. Please report retirement education event information when the event is conducted.

### **State Chairman**

- Send monthly letter to state committee members, each district chairman, and each local chairman.

## **December**

### **Local Chairman**

- Prepare items for campus visits and deliver to each building.
- Send a report of any events to TRTA State Retirement Education Committee Chairman.

## **January**

### **Local Chairman**

- Meet with campus committee members to organize items for delivery and deliver to each building. Prepare a short speech or have a legislative issue handout available for a campus staff meeting.
- Check with campus administrator for permission to present legislative priorities and ask for support from pre-retirees at a campus staff meeting.
- Make preparations for retirement seminars that are scheduled from January-May. Report events at the local meeting.
- Report retirement seminars to TRTA office using the form and send a copy to the state chairman.
- Send final report of retirement events as requested in resource guide by February 15.

### **District Chairman**

- Contact each local chairman to encourage reporting of events from January 1 to December 31 by February 1.
- Send final district report to state committee contact.

### **State Chairman & Committee**

- Send letter and information to committee members, and each district and local unit chairman.
- Meet with State Committee to prepare resource guide and convention presentation.

## **February**

### **Local Chairman**

- Campus committee members prepare items for delivery to each ISD building and deliver them early in the month.
- Continue to make preparations for seminars and events. Report results when event is completed to the state chairman and at the local meeting.
- Secure an email address in each ISD for distribution of urgent legislative information.

### **District Chairman**

- Contact locals for event reports that have not been submitted.
- Send final end-of-year reports to state committee member.

### **State Chairman & Committee**

- Send the monthly letter to each committee member and each district and local chairman.
- Compile report information from districts.
- Prepare Board of Directors report.
- Prepare report for TRTA Convention Program.
- Send final draft of resource guide to TRTA for approval by the Executive Committee.

## **March**

### **Local Chairman**

- Campus coordinators prepare items for the monthly delivery to each ISD building and complete the deliveries.
- Chairman and seminar committee complete plans and conduct events. Please report the results of the event to the state chairman at the end of the month.



**District Chairman**

- Report event results to state chairman by March 1.

**State Chairman**

- Prepare and deliver a letter of encouragement and information to state committee members, and district and local chairmen. Encourage attendance at state convention.

**April****Local Chairman**

- Give a brief report of events at the local unit meeting.
- Campus committee members prepare items for campus deliveries and deliver to each ISD building.
- Plan and prepare end-of-year programs for active school employees.

**District Chairman**

- Attend the TRTA State Convention and the retirement education session.
- Review resource guide to help you prepare and conduct training at Spring Leadership Conference.

**State Chairman & Committee**

- Prepare and send monthly letter to all committee members, and each district and local chairman to encourage attendance at Spring Leadership Training.
- Conduct retirement education session at TRTA State Convention.

**May****Local Chairman**

- Campus committee members prepare items for campus deliveries and to each ISD building.
- Report on events at the local meeting.

**District Chairman**

- Send letter of gratitude to each local chairman for efforts to provide information through the past school year to school employees.

**State Chairman**

- Prepare final letter from the state chairman and deliver to committee members and each district and local chairman. Complete end-of-year retirement education events and send reports to the state chairman.
- Prepare final report for Board of Directors.
- Review and evaluate committee charges and actions.

**June****Local Chairman**

- Meet with committee members and campus coordinator participants to evaluate and plan for the next year. Enlist help from new members to make campus visits.

**District Chairman**

- Plan and contact Regional ESC to speak at a monthly ISD superintendent's meeting. Use sample on page 18.

**State Chairman**

- Present final report at Board of Directors meeting.

# Types of Retirement Education Events

## Adopt a School

1. Talk to superintendent and principal about bringing TRS and TRTA information to the staff
2. Mentor
3. Give "goodie bags" with TRTA information included
4. Present a membership to a future retiree at PTO and other parent/teacher group meetings
5. Present TRS and TRTA literature at a faculty meeting (please note, individual questions about retirement benefits should be referred to TRS at 1.800.223.8778)
6. Ask to put up posters in lounge
7. Provide information about Before the Bell to the school superintendent
8. Provide teacher lounge snacks occasionally
9. Provide refreshments on a teacher in-service day

## Breakfast/Brunch/ Dinner or Luncheon

1. Invite a local member or district officer to speak about TRTA using the retirement education brochures and give only the ones discussed. Do not give brochures to be read later.
2. Give the TRS Benefits Handbook
3. Provide TRTA local unit membership forms

## ISD Retirement Banquet

1. Ask for a few minutes on the agenda
2. Invite a local member or district officer to speak about TRTA
3. Have TRTA and local membership forms available
4. Give "goodie bag" to each retiree with TRTA and local membership forms
5. Have a drawing for a first year membership
6. Ask PTA to give a first year membership
7. Ask ISD Superintendent to give first year membership

## Scholarship Presentations

1. Present scholarship at school with a short talk about TRTA
2. Give a goodie bag

## One on One

1. Keep brochures, TRTA phone number, enrollment for, etc. in your purse or car.
2. Use the "Each One Bring One" form

## Community Events and Fairs

1. Get a booth at the local fairs or community events.
2. Hand out membership brochures and pamphlets.
3. Have "Each One Bring One" for distribution

## Retirement Education Fair

1. Have a fair in open area such as exhibit hall and set up individual booths
2. Invite active public schools and higher education personnel to be guests
3. Solicit different individuals, organizations, and business to participate as resources.
4. Attendees should be able to visit and learn from each booth or table
5. Have a room where TRTA and TRS presentation could run several times during the day
6. Suggestions for booth/exhibits include, but are not limited to:
  - Attorneys working with wills and estate planning
  - Banks and Credit unions for investment counseling
  - TRTA endorsed member benefits companies
  - YMCA or similar organizations in your community that offer wellness programs
  - Senior Citizen centers/community parks and recreation services

Continued on next page.

- Organizations recruiting volunteers such as hospitals, museums, etc.
  - School district retirement procedures
  - Social Security
  - TRS printed information and sources for additional information
  - Travel agencies
7. Arrange to have door prizes and drawing for door prizes
  8. Send letters of appreciation to all assisting after the event
  9. Request follow-up information regarding event from those attending

### **Campus Coordinator Program**

1. The program is coordinated by the Retirement Education Committee Chairman.
2. A local member is appointed as coordinator of each campus. In most instances that person is a former staff member.
3. The campus coordinator will visit the principal at the beginning of the school year explaining what they plan to do and try to gain approval from the principal.
4. The campus coordinator will visit their campus each month and may leave newsletters, pamphlets, copies of the "Inside Line", the fact page "Do You Know the Difference," copies of *The VOICE*, and the Texas Retired Teachers Foundation brochure "Giving Guide" in the faculty workroom or in teacher mailboxes.
5. Brochures copied from the TRS and TRTA web sites may be left from time to time.
6. Unique ideas for monthly campus visits. If possible, prepare the following items for each ISD employee:
  - September:** Leave snack bags filled with raisins, cranberries, nuts, and a candy bar with label reading "You are planting the seeds of learning—Thank you! Compliments of (local unit)."
  - October:** Leave a small Pay Day candy bar with a label reading "Thank you for your service in our schools—You deserve an extra payday! Compliments of (local unit)."
  - November:** Leave a baked treat in the work room in each campus building. Pumpkin mini-muffins are great for the season. You may place a note that reads "(Local unit) is thankful for your service this Thanksgiving. Enjoy a baked treat from our members!"
  - December:** Leave a large container of puff mints in each ISD building with the following note: "Public school employees are "MINT" to be appreciated. Compliments of (local unit)."
  - January:** Leave a package of instant cocoa mix for each employee in the mailboxes with a label that reads "Thank you for warming the hearts of students for learning—Enjoy a cup of cocoa! Compliments of (local unit)."
  - February:** Leave a snack bag of Hershey's kisses in each mailbox with a label reading "Kisses for you in gratitude for your service!" Compliments of (local unit)."
  - March:** Consider leaving baked cookies, such as Pillsbury slice 'n bake shamrocks with the following message: "Luck O' the Irish' to public school employees—Enjoy cookies from (local unit)!"
  - April:** Leave individual bags of jelly beans for each employee with a label reading "You've "BEAN" good for our students—Thank you! Compliments of (local unit)."
  - May:** Leave 100 GRAND candy bar with a label reading "You deserve 100 GRAND—Thank you for your service this year! From (local unit)."

### **Steps for planning Faculty Meeting Presentation**

1. Contact School Superintendent for his approval
  - Show your prepared script
  - Bring pamphlets
  - Bring TRTA Fact Sheet
2. Schedule with principals
3. Find out how many pamphlets are needed
4. Order pamphlets from the TRTA office
5. Meet with volunteers to be sure they understand their role
  - Give each volunteer a copy of the TRTA Fact Sheet and script
  - Stress that speech will be short
  - Remember not to give advice, only the facts
6. Check to make sure volunteers have schedule with school principals
7. Return unused materials to the TRTA office

# Advanced Planning for Retirement Seminars

## **Factors for planning a Texas Retired Teachers Association (TRTA) retirement seminar:**

1. Target the Teacher Retirement System (TRS) active employees who will be retiring within the next ten (10) years.
2. Book TRS presenter one year ahead of event.
3. Decide if a local/district seminar or individual contact would be the best venue.
4. Enlist the support of the school districts, superintendents and Regional Education Service Centers (ESC).
5. Begin planning the retirement event well in advance.
6. Plan for pre-registration; take information to Education Service Centers.
7. Invite school districts and adjoining counties to join for a district wide seminar.
8. Invite a speaker from the Social Security Administration to address the GPO/WEP issues.
9. Invite a member benefits representative to inform the attendees about the benefits of joining TRTA, like AMBA.
10. Be sure to include a local unit and state membership enrollment form.

## **Addressing questions concerning individual retirement issues**

1. Refer participants to the TRS Benefit Handbook, or A Great Value for All Texans.
2. Have them call TRS for individual counseling.

## **Publicize the event**

1. Posters in schools, work places and check-in areas.
2. Notices in newspapers and on local TV/ radio stations.
3. School districts have internet communications to use for notices.
4. Many Education Service Centers (ESCs) will post TRTA retirement seminar information on web sites.
5. Make use of **social media** tools such as Facebook, Twitter and the TRTA Before the Bell online blog.
6. Deliver TRTA fliers to the schools. Get permission from local ISD superintendents before distributing TRTA information.
7. Post the event on the TRTA state, district and local unit websites.

## **Retirement Education Event Information & Order Form**

1. Complete and mail the Event & Order Form to TRTA on page 9 (or use TRTA website) at least one month prior to event.
2. TRTA will process your form, mail packets and post information on the TRTA web site under TRTA Retirement Education Committee web page.
3. Complete the response card and mail to TRTA. This information will be valuable in planning future retirement events.

**Anytime the Teacher Retirement System (TRS) is requested to come to a seminar, make sure it is understood that the Texas Retired Teachers Association (TRTA) will be hosting the event. TRTA membership can ONLY be solicited if TRTA sponsors the retirement event.**

**Refreshments will add to the enjoyment of the event. Many times local credit unions, merchants or banks will provide these.**

# Retirement Education Seminar Planning for More Than 100 Attendees District and/or Local Unit Retirement Education Chairman

## PRELIMINARY PLANNING

- 1. Encourage retirement education events at District and Local Unit planning meetings.
- 2. Set a tentative date for a retirement event.
- 3. Ask for a commitment of support and assistance from area superintendents and ESCs. Contact sponsors—Teacher Credit Union, Insurance Companies, Walmart, Subway, etc. are often times willing to help.
- 4. Contact the Teacher Retirement System (TRS) for a representative to make a presentation.
- 5. Contact other potential speakers (TRTA representative and TRTA member benefits sponsors) and **interview them.**
- 6. Contact the Social Security Administration for brochures about the Government Pension Offset (GPO), Windfall Elimination Provision (WEP), and Medicare.
- 7. Designate a local and district spokesman to promote membership in TRTA.
- 8. Set the date, time and place.
- 9. Develop a potential budget.
- 10. Prepare and distribute flyers (see page 11) and posters to all school personnel. Include on flyers/posters:
  - a. Contacts email and/or phone number
  - b. Date, time and place
  - c. Specify if lunch is included, free or cost
  - d. Recognition of sponsors

## ONGOING PLANNING

- 1. Publicize by newspapers, posters, local television and radio, ESC web sites, newsletters, TRTA social media sites, etc.
- 2. Pre-registration by email, ESC web site, or tear off flyer.
- 3. Order retirement packets from TRTA at least one month prior to event (see page 10). Order **only** the amount needed.
- 4. Prepare a printed agenda (schedule TRTA speaker first, TRS representative last).
- 5. Have each local unit provide a membership enrollment form.
- 6. Appoint a timekeeper.
- 7. Secure an on-call tech support person.
- 8. Secure registrants and greeters for event.

## CONCLUSION

- 1. Hold the retirement education seminar.
- 2. Collect all local unit membership forms and evaluations.
- 3. Send letters of appreciation to all those who assisted with the seminar.

# Worksheet for Planning a Retirement Education Activity

1. What type of activity? \_\_\_\_\_

2. Resources for the activity (Who will present information?): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. When: \_\_\_\_\_

4. Where: \_\_\_\_\_

## 5. Publicity

a. Posters/flyers (*post in all school buildings, colleges, universities, and departments: transportation, food custodian, teacher lounges, nurses' office, central office, athletic department, etc.*) \_\_\_\_\_

b. Education Service Centers (*web site, bulletin boards, ESC mail to schools in region*) \_\_\_\_\_

c. Radio/TV \_\_\_\_\_

d. Email/websites of local school districts and TRTA \_\_\_\_\_

e. Teachers' Credit Union \_\_\_\_\_

f. Social media (Facebook, Twitter, etc.) \_\_\_\_\_

## 6. Arrangements

a. Speakers \_\_\_\_\_

b. Building \_\_\_\_\_

c. Handouts/Supplemental Materials (*use TRTA order form, which is included in this packet to order TRTA materials at least one month ahead of the event*) \_\_\_\_\_

d. Refreshments/meal \_\_\_\_\_

e. Event Details (*Registration, direction, equipment, tech support*) \_\_\_\_\_

\_\_\_\_\_

7. Budget /sponsorships \_\_\_\_\_

\_\_\_\_\_



# Retirement Education Event Information & Order Form

Mail request to: Texas Retired Teachers Association  
313 E. 12th Street, Suite 200  
Austin, TX 78701-1957

- ◆ The TRTA Office will gladly send you the necessary materials for your event, as well as post the information on the TRTA web site.
- ◆ When contacting TRTA about your event, be sure to have all the necessary information complete and ready so that your requests can be handled properly (including the event's date, location, expected number of participants, etc).
- ◆ In order to process this request, please submit form to TRTA no later than 30 days prior to the event. This will allow TRTA enough time to process your packets and deliver them 2 weeks prior to your retirement education event.
- ◆ **Return unused materials to TRTA.**

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Date \_\_\_\_\_ Number of packets needed \_\_\_\_\_

Contact Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Local Unit \_\_\_\_\_ District \_\_\_\_\_

Retirement education event is: (circle one) District or Local Unit

Check one  with TRS  without TRS

Date of event \_\_\_\_\_ Time \_\_\_\_\_

Name of Building \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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TRTA Office Use

Date Order Filled \_\_\_\_\_

By \_\_\_\_\_

## LOCAL UNIT END OF YEAR REPORT ON RETIREMENT EDUCATION EVENTS JANUARY 1 THROUGH DECEMBER 31

Local Unit \_\_\_\_\_ District # \_\_\_\_\_

Local Unit Retirement Education Chairman \_\_\_\_\_

Report the number of attendees for the events listed below.  
Refer to pages 5-6 of the Resource Guide for events.

**Submit by FEBRUARY 15 to District Retirement Education Chairman**

Event	City Location Date	Number of Attendees	Number of Volunteers	Number of TRS Presenters	TRTA Presenters
Seminar					

Other Types of Retirement Education Events	Number of Events	Number of Attendees	Number of Volunteers	Number of TRS Presenters
Adopt a School				
Meal Event				
Superintendent Meeting				
One on One				
Booth at Event				
Faculty Meeting				
Campus Coordinator Program				
Other				

**COMMENTS** (Please report unique themes or event formats):

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