

2026-2027

TRTA LEADERSHIP MANUAL



TRTA

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SECTION 1: ABOUT TRTA & DIRECTORY

Overview

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How to Use the TRTA Leadership Manual

Icons (pictured on the right) are shown on most pages in this manual, indicating to whom the information pertains. Sections 1 and 2 will be used by all leaders.

Mission Statement

The Texas Retired Teachers Association advocates improved benefits for all education retirees and promotes the well-being of its members.

Tagline

TRTA: The Voice for All Public Education Retirees

Where to Find the TRTA Forms

Many member resources for District and Chapter Committees are available by visiting the TRTA website at www.trta.org/about-trta/standing-committees. (You can also navigate to this page by visiting trta.org, hovering over the About tab, then clicking on Standing Committees). Click on Learn More for the Committee you wish to view (you may also click on President or Secretary). This will take you the Committee's webpage, where you will find a one-page summary detailing the responsibilities of District and Chapter Chairs for that Committee, as well as any other additional documents that may be helpful for that role.

Some member resources are only available on the TRTA Member Login site. This includes the District and Chapter Treasurer resource guides, installations and memorial ceremony documents, and District and Chapter awards templates. You will also be able to locate Technology resources and Retirement Seminar processes on this site, as well as forms for the Children's Book Project, Proposed Amendments to the *TRTA Bylaws*, E.L. Galyean Award Nominations, and much more.

To access the Member Login site, click the red Member Login button at the top right of the TRTA website (www.trta.org). Please enter your username and password. Typically, your username is your member ID (your member ID is printed on the back of every issue of *The VOICE*). In many cases, your password is `trta123` unless you have changed it. If you forgot your Username, please use the Forgot Username link. To retrieve your password, use the Forgot Password link. You will receive an email to reset your password. If you have any difficulty with your username and password, please send an email to membership@trta.org or call **1.800.880.1650** and a staff member will assist you. Click on the Member Resources Tab to view a series of tabs where you can find additional forms and guides.



History of the Texas Retired Teachers Association (TRTA)

The Texas Retired Teachers Association (TRTA) originated through the efforts of the National Retired Teachers Association (NRTA), which organized six Chapters in Texas: El Paso (1945), Dallas (1949), Fort Worth (1950), Houston (1951), and both San Antonio and Austin in 1952.

In July 1953, 65 members from these Chapters attended the NRTA convention in Miami, Florida. There, they met with NRTA founder Dr. Ethel Andrus and, under her guidance, planned the formation of a Texas state organization. On November 17, 1953, in Dallas, Officers were elected, a constitution and bylaws were adopted, and a statewide meeting was scheduled for fall 1954—officially establishing TRTA.

Initially, TRTA operated without a formal office, with early Presidents storing records in their homes. In 1979, the Executive Board approved the creation of a central office in Austin and began organizing Texas into 20 Districts. This restructuring became especially important after NRTA merged with the American Association of Retired Persons (AARP) in 1982. Following the merger, TRTA Districts and Chapters became more autonomous, assuming leadership roles previously supported by NRTA.

By February 2019, TRTA had grown to include 254 Chapters and nearly 94,000 members, making it the largest organization of its kind in the U.S.

Over the past several decades, TRTA has led numerous legislative efforts to improve retirement benefits for Texas public education retirees. Key milestones include:

1970s-1980s: Retirement benefits improved, including changes from a 10-year to a 3-year salary average for annuity calculations. However, these changes initially excluded current retirees.

1993: TRTA launched the Consumer Price Index (CPI) Catch-Up Plan to address inequities for current retirees. Phased in over four legislative sessions, it provided benefit increases and enhancements, including recalculated annuities, minimum floors, and an improved multiplier (from 2% to 2.3%). A “pop-up” option was extended to retirees from earlier years.

1985-1986: TRTA helped establish TRS-Care, a health program including prescription coverage.

2001-2008: Amid rising inflation, TRTA secured the first benefit increase in six years, delivering a 13th check in January 2008.

2013: Passage of Senate Bill 1458 ensured the TRS pension fund was actuarially sound and granted a permanent 3% COLA for 200,000 retirees.

2015-2017: TRTA safeguarded TRS-Care with \$768 million in state funding and supported reforms under HB 3976, transitioning to a high-deductible plan and Medicare Advantage options.

2019: Senate Bill 12 again secured actuarial soundness and provided supplemental payments for retirees.

2021–2023: TRTA influenced major legislative victories, including additional funding, TRS-Care improvements, and two return-to-work bills. In 2023, TRTA advocacy led to a historic \$5 billion in general revenue appropriated for tiered COLAs and supplemental payments.

TRTA members also successfully championed Proposition 9 in the November 2023 General Election, which passed with 84% of the vote and provided \$3.3 billion in funding for COLAs. On January 5, 2025 President Joe Biden signed H.R. 82, the Social Security Fairness Act, into law. With this signing, the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) are finally repealed!

The Power of Membership

TRTA's greatest strength lies in its dedicated members. Every accomplishment—from legislative victories to expanded benefits—is the direct result of their tireless advocacy. Thank you for your continued service and commitment to supporting Texas public education retirees.

2025-2026 Highlights

July 2025

- TRTA successfully ran digital marketing campaign that raised awareness of association and WEP & GPO victory.
- TRTA Board of Directors and staff hosted virtual meetings to begin planning for first-ever House of Delegates Live event.

August 2025

- Standing Committees, as well as the Health and Safety Special Committee, met virtually to update goals and objectives for the coming year.
- TRTF began planning “Boots & Books” event.
- TRTA launches Chalkboard Champion, a series of stories celebrating the dedication, innovation, and impact of public school educators across Texas.

September 2025

- Districts began hosting their Fall Conferences across the state.
- TRTA partnered with Congress members to ensure fair implementation of WEP & GPO repeal.

October 2025

- Districts continued hosting their Fall Conferences across the state.

November 2025

- TRTF promoted its charitable programs to fundraise for Foundation Month.
- The E.L. Galyean Service Award Recipient was named: Earl Wall, District 12.
- TRTA promoted voting in the election regarding state constitutional amendments.

December 2025

- TRTA Executive Director Tim Lee visits Washington D.C. to advocate for improved Social Security benefits for retirees.
- Planning for the House of Delegates Live continued.
- TRTA & ME digital stories capped off its inaugural year by highlighting five key stories.

January 2026

- TRTA celebrated the one-year anniversary of the repeal of the WEP and GPO.
- Tim Lee hosted live stream event commemorating the WEP and GPO victory.
- TRTA launched a new web series called TRTA 101, informing retirees about key issues.

February 2026

- TRTA and Districts ran rehearsals for House of Delegates Live.
- TRTA continued to run TRTA 101 live streams.

March 2026

- TRTA hosts successful House of Delegates Live event.
- House of Delegates approved dues increase to \$48 per year, starting in 2027.
- District Spring Conferences began.
- TRTA continued to run TRTA 101 live streams.
-

April 2026

- TRTF successfully hosts “Boots & Books” event at National Medal of Honor Museum.

May 2026

- Governor Greg Abbott sent a letter to TRS instructing them to lower TRS-Care premiums.

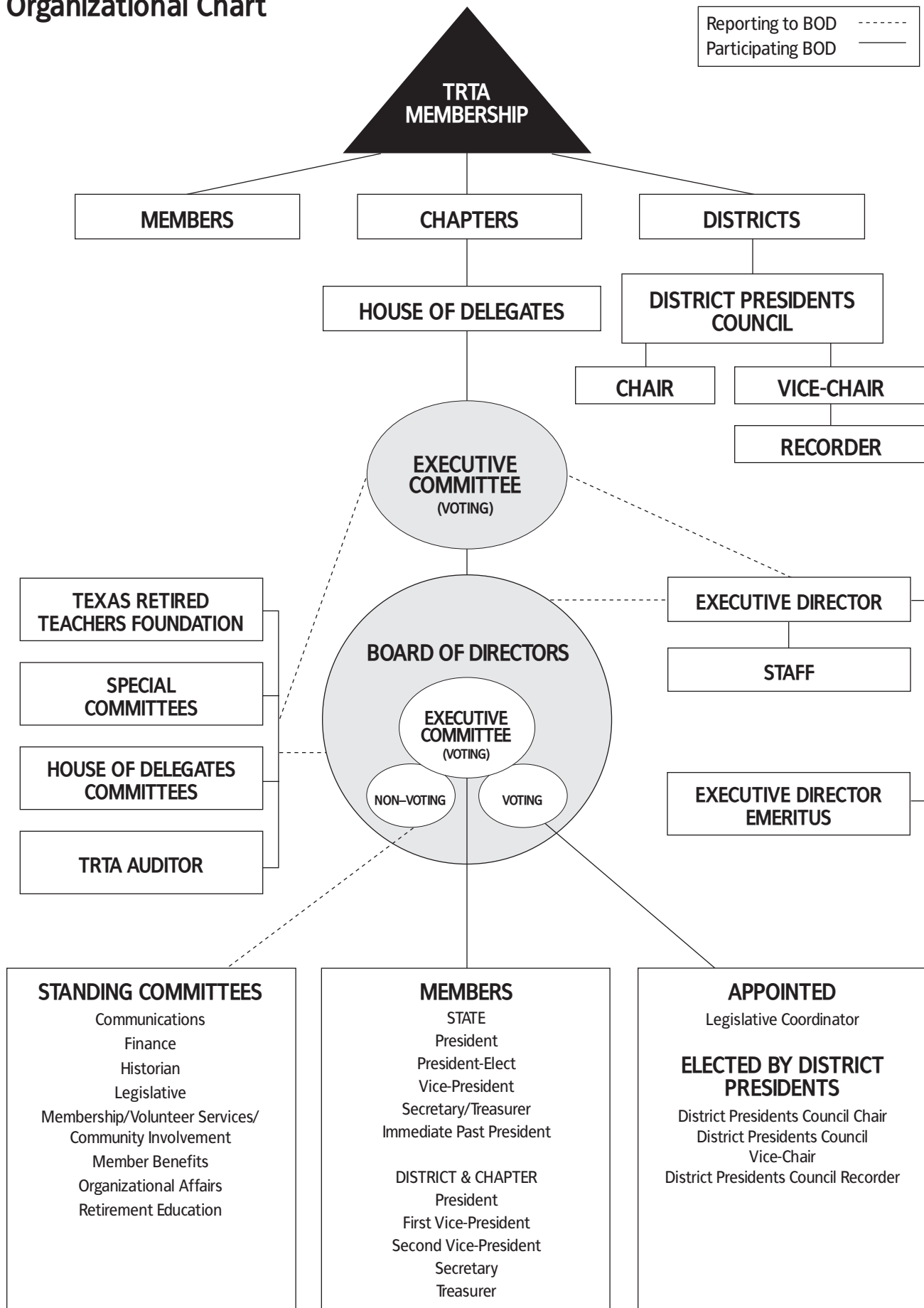
In addition:

- The TRTA Board of Directors met a total of 13 times since July 2025, including 2 in person meetings and 11 virtual meetings.
- *The VOICE*, the TRTA news bulletin, was published four (4) times.
- The rebate of \$3.00 per member was paid in May 2026 to the 20 Districts in the total amount of \$255,762 for the 2025-2026 membership year.
- Eighty Chapters received a total of \$5370, which represented an increase of 537 members over the previous year. Dues revenue increased by a total of \$18,795 because of these additional numbers.
- TRTA membership as of February 28, 2026 was 96,372 members (at-large members 56,948, Chapter members 39,424).

Contributions by TRTA members for 2025:

- Contributed 5,760,868 hours of community service, valued at \$200,420,597 million.
- As part of the Children's Book Project and the Student-to-Student Book Program, 219,542 books were distributed to schools.
- The 2025-2026 "Greatest Increase in Membership Numbers" was awarded to District 1.
- The 2025-2026 "Greatest Increase in Membership Percentage" was awarded to District 1.
- The 2025-2026 "Chapter With the Greatest Increase in Membership Percentage" was awarded to Zapata Co RSEA.
- The 2025-2026 "Chapter With the Greatest Increase in Membership Numbers" was awarded to Erath Co ARSE .
- In April 2026, TRTF awarded 45 First-Year Teacher Scholarships in the amount of \$1,000 each. TRTF has awarded \$270,000 in scholarships since 2008.
- In April 2026, TRTF awarded 50 Classroom Assistance Grants in the amount of \$1,000 each. TRTF has awarded \$298,000 in grants since 2008.
- In 2025, TRTF's charitable program "A Helping Hand" distributed more than \$30,000 to retirees to assist with medical and dental bills, home and auto repairs, and utility bills. Since its inception in 2010, TRTF has awarded over \$345,000 in aid.

Organizational Chart



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Chapters by Districts

District 1

Brownsville Area RSEA
Edinburg RTA
Harlingen Mid Valley RTA
Laredo Area RSEA
Magic Valley RSPA
Palm Valley ARSP
Starr Co RSEA
Zapata Co RSEA

District 2

Aransas Co RTA
Corpus Christi Area RTA
Kingsville-Tri City RTA
Live Oak Co RTA
San Patricio Co RTA
Tri-Co RTA

District 3

Bee Co RSP
Colorado Co RTA
De Witt Co RSP
Goliad Co RSP
Jackson Co RSP
Karnes Co RSP
Lavaca Co RSP
Matagorda Co RTA
Refugio Co RSP
Victoria Co RTA
Wharton Co RTA

District 4

Alvin Area RSP
Barbers Hill Area RSP
Baytown Area RSEA
Brazoria Co RTA
Brazosport ARSP
Clear Creek ART
Crosby Area RTA
Cypress-Fairbanks ARE
Fort Bend Co REA
Fort Bend-Harris RE
Galveston RTA
Houston ART
Houston-Harris Co RTA
Humble Area RTA
Katy Area RE
Klein ARE
La Porte RSEA
Mainland RTA
North Harris Co ARSP
Northeast Harris Co REA
Pasadena Area RSE
Pearland EAR
Spring Branch Area RSE

District 5

Beaumont ART
Hardin Co RTA
Jasper RTA
Kirbyville RSPA
Mid-Jefferson Co RSP
Orange Co RTA
Port Arthur ARSP
Twin Co RSPA

District 6

Austin Co RTA
Brazos Co RSP
Brenham Area RSP
Grimes Co RSPA
Leon Co RTA
Madison Co RSPA
Milam Co RSPA
Montgomery Co ARSP
North Montgomery Co RSP
Polk Co RTA
Prairie View RTSPA
Robertson Co RTA
San Jacinto Co RSPA
Walker Co RTA
Waller Co RTA

District 7

Anderson Co REA
Angelina RTSPA
Cherokee RSP
Henderson Co RSPA
Nacogdoches Co RTA
Panola Co RSEA
Rusk Co RTA
Smith Co RTSPA
Toledo Bend RTA

District 8

Cass Co RSEA
Eastern Cass Co SRA
Franklin Co RSEA
Harrison Co RTA
Hopkins-Rains RSP
Hughes Springs RSE
Lamar-Delta RTSEA
Longview-Gregg Co RTA
Morris Co RSEA
Mt Pleasant-Titus Co RSPA
Oil Patch TRTA SE
Red River Co RSEA
Texarkana-Bowie Co RTA
Upshur Co RSEA
Western Bowie Co RTA
Wood Co RSPA

District 9

Baylor Co ARSP
Burkburnett RTEA
Clay Co ARSP
Graham Area RTA
Hardeman Co RSP
Jack Co RSEA
Montague Co RSP
Olney Area RSP
Vernon Regional RSEA
Wichita Falls Area ARSP
Wichita-Archer RSP

District 10

Allen REA
Carrollton-Farmers Branch RSPA
Dallas RTA
Ennis RSPA
Fannin Co RTSP
Forney REA
Frisco Area RSP
Garland RSP
Grand Prairie RSP
Greenville Area RTE
Irving RSPA
Kaufman Co RSP
McKinney Area SRA
Mesquite ARSE
Northeast Hunt Co RSE
Plano RTA
Richardson RSP
Rockwall Area RTA
Southwest Dallas Area RSE
West Ellis Co RSP
West Grayson RSPA
Wylie RSE

District 11

Arlington RSEA
Azle Tri-Co RSEA
Birdville ARSP
Burleson Area RSEA
Castleberry SRA
Cooke Co RSP
Denton Area RSPA
Eagle Mt-Saginaw RSE
Everman Area RSEA
Fort Worth RSEA
Grapevine-Colleyville Area RSE
Hood Co RSPA
Hurst-Euless-Bedford RSE
Johnson-Somervell Cos RSEA
Lewisville Area RSPA
Mansfield RSEA
Northwest RSEA
Palo Pinto Co RTA
Parker Co RTA
White Settlement RSEA
Wise Co RSPA

District 12

Bell Co RSEA
Bosque Co RTA
Copperas Cove RTA
Coryell RSP
Falls Co RTA
Freestone Co RTA
Hamilton Co RSP
Hill Co RTA
Killeen SRA
Lampasas Co RTA
Limestone Co RSP
Waco-McLennan Co RTA

District 13

Austin RTA
Bastrop Co RTA
Blanco and Western Hays Cos ARES
Caldwell Co RTA
Comal TRTA
Fayette Co RTA
Gillespie Co RTA
Gonzales Co RTA
Guadalupe Co RSP
Highland Lakes RTA
Lee Co Unit of RTA
New Braunfels RTA
San Marcos ARTS
Williamson Co RTA

District 14

Abilene RTA
Eastland Co RTA
Rolling Plains Unit RSP
Scurry Co RTA
Shackelford RTA
Stephens Co RSPA

District 15

Brown Co RSE
Coke Co RTA
Coleman Co RTA
Comanche Co RSE
Concho Valley RTA
Erath Co ARSE
McCulloch Co RTA
Menard-Kimble-Mason RTA
Runnels Co RSE

District 16

Amarillo ARSP
Childress RSP
Collingsworth Co RSPA
Dimmitt Area RSPA
Donley Co RSPA
Hereford RSEA
Hutchinson Co RSPA
Pampa RSPA
Parmer Co RTSP
Perryton Area RSPA
REA Dumas
REA Panhandle Schools
Swisher-Briscoe RSP

District 17

Cochran-Hockley ART
Cottle Co RSP
Lamb Co RSPA
Lubbock-S Plains RTA
Plainview Area RSPA
Slaton RTA
Terry Co RSPA
Yoakum Co RSPA

District 18

Andrews/Gaines Co RSEA
Crane REA
Howard Co Area RSE
Midland ARSP
Mitchell Co RSP
Monahans Area RSP
Odessa RT/SPA

District 19

El Paso RTA
El Paso-Lower Valley RTA
Ysleta RSEA

District 20

Atascosa McMullen RSP
Bandera Co RTA
Del Rio Area RSPA
Harlandale-S Bexar Co ERA
Hill Country RSEA
Huajilla Area RTS
Kendall Co RTA
Maverick Co RSPA
North San Antonio RTA
Randolph Area RE
San Antonio Area RTA
Uvalde Area RTA
Wilson Co RSP

Flag Etiquette

Pledges of Allegiance to National and State Flags

- A. When on display, the United States flag is accorded the place of honor, always positioned to its own right (left to a person facing the wall). Place it to the right of the speaker or staging area or sanctuary. Other flags should be to the left. When displaying the flag against a wall, vertically or horizontally, the flag's union (stars) should be at the top, to the flag's own right, and to the observer's left. The Texas flag should be placed to the observer's right.
- B. Pledges of allegiance to the flags should be rendered by all present except those in uniform by standing at attention facing the flag with the right hand over the heart. An individual who is not in uniform and who is wearing a head covering that is easily removable should remove it with the right hand and hold it at the left shoulder, with the hand over the heart. Individuals in uniform should remain silent, face the flag, and render the military salute. Veterans may choose not to remove their head covering and may render a military salute.
- C. The pledge of allegiance to the state flag may be recited at all public and private meetings at which the pledge of allegiance to the United States flag is recited, and at state historical events and celebrations.
- D. The pledge of allegiance to the state flag should be recited after the pledge of allegiance to the United States flag if both are recited.
- E. When the National Anthem is played or sung, citizens should stand at attention, place the right hand over the heart or salute at the first note and hold the salute through the last note. The salute is directed to the flag, if displayed, otherwise to the music.
- F. The pledge of allegiance may be recited without the flag being present. The flag should be present; however, when situations dictate that it is not present, it would still be appropriate to recite the pledge. Simply stand and place the right hand over the heart and face towards the person leading the recitation of the pledge or where the flag would normally be placed.

"I pledge allegiance to the Flag of the United States of America, and to the Republic for which it stands, one Nation under God, indivisible, with liberty and justice for all."

"Honor the Texas flag; I pledge allegiance to thee, Texas, one state under God, one and indivisible."

2026-2028 TRTA Board of Directors

President

Frana Patterson ◇
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President-Elect/

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◇ Executive Committee

* Also Standing Committee Chair

■ Non-voting

2026-2028 TRTA Standing Committee Chairs

Historian

Melissa Ramos ■
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Member Benefits

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2026-2027 TRTA Standing Committees

Communications Committee:

Gary L. Schepf, Chair, District 10

Finance Committee:

Karen Hoelscher, Chair, District 15

Historian Committee:

Melissa Ramos, Chair, District 20

All District Historians

Membership/Volunteer Services/ Community Involvement Committee:

Terri Navrkal, Chair, District 17

Member Benefits Committee:

Frana Patterson, Chair, District 11

Terri Navrkal, District 17

Gary L. Schepf, District 10

Karen Hoelscher, District 15

Ella Gauthier, District 4

Legislative Committee:

Dr. Mary Widmier, Coordinator, District 4

Dora Luz Cackley, District 1

Belinda Aguilar, District 2

Robin Metting, District 3

Jane Eixmann, District 4

Richard Briggs, District 5

Johnie Walker, District 6

Phil Worsham, District 7

George Moore, District 8

Dee Palmore, District 9

Thomas Poore, District 10

Bill Combs, District 11

Alicia Smith, District 12

Gloria Cisneros Lenoir, Ph.D., District 13

Sharon Daugherty, District 14

Nancy Byler, District 15

Katrece Hale, District 16

Eric McKnight, District 17

Shirley Johnson, District 18

Helen Rojas, District 19

Richard Herbst, District 20

Organizational Affairs Committee:

Sandra Barber, Chair, District 10

Retirement Education Committee:

Judy Kennedy, District 17

2026-2028 TRTA District Presidents

District 1

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District 12

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josugg@embarqmail.com

District 13

Joe Ramirez
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Austin, TX 78704
512.917.8691
joemram@yahoo.com

District 14

William Cochran
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Abilene, TX 79606
325.660.1213
wcochran2022@yahoo.com

District 15

Deborah Davis
7200 US Highway 84
Coleman, TX 76834
432.934.4248
davisdebbie919@gmail.com

District 16

Kathy Cavalier
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Pampa, TX 79065
806.662.2729
kathykavalier@gmail.com

District 17

Robert Cooper
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Slaton, TX 79364
806.787.5965
rlcoop28@att.net

District 18

Judy Crawford
1406 Cedar Lane
Andrews, TX 79714
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judithleec@yahoo.com

District 19

Stephen Evans
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El Paso, TX 79925
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steveevans0208@gmail.com

District 20

Adele Murphy, PhD
7834 Broadway #503
San Antonio, TX 78209
830.522.0838
adelem54@yahoo.com

Past TRTA Presidents

* Deceased

Eula Ware* (1953-1955), Ella J. Smith* (1955-1963), Mrs. James R. Wright* (1963-1965),
Virginia R. Juergens* (1965-1967), Jennie Wilmot* (1967-1969), Juanita Dupue* (1969-1971),
Dr. L. C. McDonald* (1971-1973), Dr. Grady St. Clair* (1973-1974), Blanche Shear* (1974-1976),
T. E. McCollum* (1976-1977), Mayme Carlin* (1977-1979), Dr. Ernest S. Rambo* (1979-1981),
Dr. Kate A. Bell* (1981-1983), Dr. Anthony Hunt* (1983-1985), Gladys Neu* (1985-1987),
Enid Littlefield* (1987-1989), Jewell Harris* (1989-1991), Elmer Grounds* (1991-1992),
Charles Mitchell* (1992-1994), Myrtice Larson* (1994-1996), Robert “Bob” Richards* (1996-1998),
Dr. Kenneth Laycock* (1998-2000), Dr. Myron Koehler* (2000-2002), Tom Pritchard* (2002-2004),
Jack Felts* (2004-2006), Aubrey Cherry (2006-2008), Dora H. Scott-Nichols* (2008-2010),
Herbert Norris (2010-2012), Maridell Fryar (2012-2014), Fran Plemmons (2014-2016), Nancy Byler (2016-2018),
Patricia Macias (2018-2020), Leroy DeHaven (2020-2022), Marcy Cann (2022-2024), Ella Gauthier (2024-2026)

E.L. Galyean Service Award Recipients

Dilla Enochs (1996), Dr. Kate Bell (1998), Ernest I. Kelly (2000), Michael W. Lehr (2002), Dr. Charles R. Kelso (2002),
Dr. Kenneth Laycock (2003), William M. Stribling (2004), Enid Littlefield (2005), LaVonne Smith Rogers (2005),
Myrtice I. Larson (2006), T.C. Letts (2007), Bill and Sue Passmore (2008), Jack and Marjorie Felts (2009),
Dr. Ruth Amend (2010), Tom and Jane Pritchard (2011), Dr. Norma Hill (2012), Glenna Burns (2013),
Tom Rogers (2014), Dora H. Scott-Nichols (2015), Carlos Ortiz (2016), Maridell Fryar (2017),
Dr. William “Corky” Pence (2018), Herbert Norris (2019), Bill Barnes (2020), Aubrey Cherry (2021),
Martha Kallus (2022), Mary Ann Dolezal (2023), Elva Garcia (2024), Mary Jane Hamilton (2025), Earl Wall (2026)

TRTA Staff

Tim Lee, Executive Director (tim@trta.org)

Directs state office and legislative program; provides organizational support to Executive Committee and Board of Directors and represents TRTA at TRS, in the Texas Legislature, Congress and at various public gatherings. Responsible for the overall strategic direction of TRTA. Manages the staff of TRTA. TRTF State Coordinator. General Partner, 12th Street Limited. (Committees: Executive, Finance, and Member Benefits).

Rosalind Johnson, CPA, Deputy Director (rosalind@trta.org)

Assists the Executive Director in overseeing and implementing various aspects of TRTA, TRTF and 12th Street Ltd. Provides financial oversight in budget development, financial reporting and ensuring financial compliance for all entities. Manages the combined annual audits for TRTA, TRTF, TRTA GP LLC and Twelfth Street Ltd. entities and compiles all the information for the required tax returns. Maintains the accounting and tax compliance of all the entities. Assist the Executive Director in supervising and supporting staff. Works with building management company to maintain the state office building and tenants. (Committees: Executive, Finance, and Member Benefits).

Brock Gregg, Associate Director, Strategic Partnerships and Member Outreach (brock@trta.org)

Assists with the legislative development. Works with the Executive Director and lobbyists to review plans, programs, and advancement of objectives to ensure annual goals. Assists with representing TRTA at TRS, in the Texas Legislature and various public gatherings. Serves as liaison to District Presidents. (Committees: Legislative and Retirement Education).

Roy Varney, Associate Director of Communications and Multimedia (roy@trta.org)

Writes and edits all publications. Generates video and social media content, assists with district and chapter web pages, writes, and edits all publications. Generates video for the Foundation. Maintains the TRTA website. Assist with technology for TRTA. Provides leadership to the Communication Team. (Committees: Legislative, Communications, Health and Safety).

Ashley Jaramillo, Chief of Staff (ashley@trta.org)

Works with the Executive Director and Deputy Director on operations, program integration, volunteer leadership, and organizational planning. Oversees internal team coordination, staff projects, and initiatives. Plans all state meetings and prepares materials for the Executive Committee and Board of Directors meetings. Manages TRTA state events such as House of Delegates, Convention, DPLC, and Day at the Capitol. (Committees: Executive and Organizational Affairs).

Brenda Faught, Controller (brenda@trta.org)

Works with the Deputy Director to maintain the financial activities of TRTA, TRTF and 12th Street Ltd. Assist with the annual audits. Implements and maintains internal controls to protect the assets and ensure the integrity of the financial information for all entities. Assists with the compliance requirements of the database. Assists membership with database programs and serves as liaison with third party software and network support vendors. (Committees: Finance and Membership/Volunteer Services/Community Involvement).

Laura Rios Escareño, Graphic Designer (laura@trta.org)

Develops visual concepts to communicate ideas and information for all publications, email communications, direct marketing materials, and promotional items. Assists with updating the TRTA website by adding and maintaining content and visuals to ensure brand consistency. Collaborates with the communications team to create new materials and support strategic initiatives. Organizes, maintains, and updates governing documents to ensure compliance with organizational policies and procedures. Prepares and submits requests for pricing to printing vendors with project specifications and timelines. Designs Foundation publications and digital advertisements. (Committee: Communications).

Wendy Ward, Communications and Multimedia Assistant (wendy@trta.org)

Writes and edits TRTA & ME stories. Manages TRTA's social media channels. Provides reporting and analytics on digital content platforms. Assists with digital content distribution and membership queries. Oversees the Executive Director's calendar and travel arrangements. (Committee: Retirement Education).

Brandy Lockard, Membership Analyst (brandy@trta.org)

Supports membership operations by processing enrollments and renewals. Serves as a point of contact for member and chapter officer inquiries. Provides administrative support for the membership database and in other essential areas of the membership department. (Committee: Membership/Volunteer Services/Community Involvement).

Courtnie Lockard, Office and Operations Coordinator (courtnie@trta.org)

Supports daily organizational operations by coordinating administrative tasks and contributing to special projects. Provides administrative and operational support to staff and leadership while assisting with membership services.

Hannah Soechting, Office/Membership Assistant (hannah@trta.org)

Provides general administrative support, such as answering and directing incoming calls, assisting with membership inquiries, dues processing, and data entry.

Sarah Richardson, TRTF Senior Operations and Programs Advisor (sarah@trta.org)

Works as direct liaison to the TRTF. Manages the charitable programs for TRTF. Assists TRTA District and Chapter leaders with Foundation services. Works with TRTA management on membership relations and strategic interactions. Contributes creative content and ideas to the Communication team.

Texas Retired Teachers Foundation Board of Trustees and Staff

Bill Barnes, President
santabell@prodigy.net

Jesse Ramos, Vice-President
jesse@byramos.com

Nancy Byler, Secretary/Treasurer
Byler0445@hotmail.com

Gwen Craig, Trustee
gwen.craig@yahoo.com

Maridell Fryar, Trustee
mfryar4950@att.net

Mollye Long, Trustee
mlong0022@gmail.com

Patricia Macias, Trustee
pmaciasalice12@gmail.com

David Olivas, Trustee
dolivasceltics@gmail.com

June Cooper, Trustee
swjgcooper@aol.com

Cathleen Duvall, Trustee
cmduvall@aol.com

Andi Kirby, Trustee
kirbypars@aol.com

Tim Lee, Executive Director
tim@trta.org

Sarah Richardson, TRTF Senior Operations and Programs Advisor
sarah@trta.org

Key Sources for Retirement Information

Teacher Retirement System of Texas (TRS).....	1.800.223.8778
1000 Red River • Austin, TX 78701-2698	512.542.6400
email: trs@trs.state.tx.us.....	www.trs.state.tx.us.....fax 512.542.6597
TRS Automated Information.....	1.888.877.0123
TRS–Care	1.800.223.8778 x 6456
TRS–TTY Service (hearing impaired).....	800.841.4497 512.542.6444
The best days to call TRS are Tuesday and Thursday.	
Express Scripts Prescription Drug.....	1.800.367.3636, PRESS 2
TTY Service (hearing impaired)	1.800.716.3231
A complete listing of TRTA Member Benefits.....	www.trta.org
Social Security.....	1.800.772.1212
TX Dept. of Social Security Administration (TDSS)	www.ssa.gov
Medicare.....	www.medicare.gov 1.800.772.1213
TX Dept. of Aging and Disability Services	www.dads.state.tx.us..... 512.438.3011
Veteran Resources.....	1.800.827.1000
Life Insurance.....	1.800.669.8477
Health care benefits.....	1.877.222.8378
Texas Veterans Commission.....	www.tvc.state.tx.us 1.800.252.8387

Three Important Organizations and What Happens in Each to Benefit Education Retirees

TEXAS LEGISLATURE	TEACHER RETIREMENT SYSTEM OF TEXAS (TRS)	TEXAS RETIRED TEACHERS ASSOCIATION (TRTA)
Legislature passes laws to determine: ★ Funding for TRS–Care health insurance ★ Annuity increases ★ Benefit improvements ★ Who can lobby	★ Invests contributions made by active school employees and state contributors ★ TRS is a defined benefit plan, not a defined contribution plan ★ Provides TRTA with requested data so TRTA may propose legislation ★ Sends annuity checks to retirees ★ Cannot influence legislation	★ We are the only organization that works exclusively for TRS annuitants ★ TRTA has an Executive Director and 21 legislative committee members ★ <i>The VOICE</i>, TRTA news bulletin ★ <i>Inside Line</i>, an immediate update on legislative issues Sign up at www.trta.org ★ Member Benefits

TEA Education Service Centers

REGION 1

Dr. Daniel King
1900 West Schunior
Edinburg, TX 78541
956.984.6001
fax 956.984.7655

REGION 2

Dr. Esperanza Zendejas
209 North Water Street
Corpus Christi, TX 78401
361.561.8400
fax 361.883.3442

REGION 3

Morris Lyon
1905 Leary Lane
Victoria, TX 77901
361.573.0731
fax 361.576.4804

REGION 4

Dr. Rodney Watson
7145 West Tidwell
Houston, TX 77092
713.462.7708
fax 713.744.6514

REGION 5

Dr. Byron Terrier
350 Pine Street, Suite 500
Beaumont, TX 77701
409.951.1700
fax 409.951.1800

REGION 6

Michael Holland
3332 Montgomery Road
Huntsville, TX 77340
936.435.8400
fax 936.295.1447

REGION 7

Todd Schneider
1909 N. Longview Street
Kilgore, TX 75662
903.988.6700
fax 903.988.6708

REGION 8

Dr. David W. Fitts
4845 U.S. Highway 271 N.
Pittsburg, TX 75686
903.572.8551
fax 903.575.2611

REGION 9

Wes Pierce
301 Loop 11
Wichita Falls, TX 76306
940.322.6928
fax 940.767.3836

REGION 10

Dr. Jana Melsheimer
400 E. Spring Valley Road
Richardson, TX 75081
972.348.1750
fax 972.231.3642

REGION 11

Dr. Brad Schnautz
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817.740.3600
fax 817.740.7600

REGION 12

Dr. Kenny Berry
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fax 254.666.0823

REGION 13

Dr. Rich Elsasser
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fax 512.919.5374

REGION 14

Mr. Chris Wigington
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325.675.8600
fax 325.675.8659

REGION 15

Dr. Casey Callahan
612 S. Irene Street
San Angelo, TX 76903
325.658.6571
fax 325.655.4823

REGION 16

Dr. Tanya Larkin
5800 Bell Street
Amarillo, TX 79109
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fax 806.677.5001

REGION 17

Dr. Kyle Wargo
1111 West Loop 289
Lubbock, TX 9416
806.792.4000
fax 806.792.1523

REGION 18

Dr. Dewitt Smith
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Midland, TX 79706
432.563.2380
fax 432.567.3290

REGION 19

Dr. Armando Aguirre
6611 Boeing Drive
El Paso, TX 79925
915.780.1919
fax 915.780.6537

REGION 20

Dr. Jeff Goldhorn
1314 Hines Avenue
San Antonio, TX 78208
210.370.5200
fax 210.370.5750

TRTA Districts do not always align
with Education Service Centers.

SECTION 2: BYLAWS & POLICIES

Overview

This section contains directories for the following:

- TRTA Bylaws | 25-31
- TRTA Policies | 33-53

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TRTA BYLAWS



**Amended by the House of Delegates
March 25, 2026**

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2026-2028 TRTA Bylaws

Article I. Name

The name of the corporation shall be the Texas Retired Teachers Association, hereinafter referred to as TRTA.

Article II. Purpose

The corporation is organized for the purpose of promoting the economic, intellectual, and social well-being of retired school personnel and other public-school employees through the District and Chapters.

Article III. Affiliation

TRTA is an autonomous organization which consists of the state organization supported by Districts and Chapters all of which function to promote the purpose of TRTA. Districts and Chapters operate under the TRTA bylaws and policies.

Article IV. State Members

Section 1. Membership Eligibility

The following are eligible for membership upon payment of State dues:

1. An annuitant or a beneficiary receiving an annuity from a teacher retirement system; or
2. Any person interested in public education and willing to work to achieve the objectives of TRTA.

Section 2. State Dues

Membership State dues are based on a rate established by the Board of Directors and approved by the House of Delegates.

Section 3. Calendar

The fiscal year shall be July 1 through June 30.

Article V. State Officers and Elections

Section 1. Officers

The Officers shall be the President, President-Elect, Vice-President, Secretary/Treasurer, and Immediate Past President.

Section 2. Nominations and Elections

The House of Delegates will be presented with the names of all nominees meeting the qualifications of the office for which the nominee has filed. The Officers shall be elected by the House of Delegates. If circumstances prevent an in-person House of Delegates, election by delegates may be conducted electronically.

Section 3. Eligibility

Members are eligible for office if they receive an annuity from the Teacher Retirement System of Texas, have been in a Chapter for at least three (3) years, have served as an elected Officer of a District or Chapter, but need not have served as a statewide Officer.

Section 4. Terms

Officers are elected for two-year terms, coinciding with the fiscal year, with no subsequent consecutive term.

Section 5. Vacancies

If there is a vacancy in the office of President, the President-Elect will become the President. If the President-Elect is unable to assume the office of President in such a case, the Vice-President, Secretary/Treasurer, in that order, shall do so. When any officer assumes the office of President, the resulting vacancy shall be filled by appointment. The President, with the approval of the Board of Directors, shall appoint a qualified member to fill a vacancy occurring in any elected office and in any appointed position.

Section 6. Removal from Office

An Officer can be removed from office only for cause by a two-thirds vote of those present at a regular meeting of the Board of Directors, with a quorum present, when previous written notice has been given.

Article VI. State Board of Directors

Section 1. Board of Directors

The voting members of the Board of Directors shall be the President, President-Elect, Vice-President, Secretary/Treasurer, Immediate Past President, District Presidents Council Chair, District Presidents Council Vice-Chair, District Presidents Council Recorder, and Legislative Coordinator.

Section 2. Terms

All board members shall serve two-year terms in their respective positions, except for the Legislative Coordinator, who shall be eligible for reappointment and serve no more than 8 years. The Legislative Coordinator is required to be a member of a Chapter and be receiving an annuity from the Teacher Retirement System of Texas.

Section 3. Responsibilities

The Board of Directors shall:

1. Conduct business between the meeting of the House of Delegates, subject to the instructions of the House of Delegates;
2. Maintain a blanket fidelity bond covering the officers and all employees;
3. Employ an Executive Director and determine compensation and period of contract;
4. At its discretion, appoint an Executive Director Emeritus; and
5. Conduct such other duties as outlined elsewhere in these bylaws.

Section 4. Meetings

The Board of Directors shall meet at least four (4) times a year, at an agreed upon time and place. Special meetings may be called by the President, the Executive Director, or four (4) directors. The Board of Directors may meet via electronic communications media as directed by the President and the Executive Director, so long as all members can simultaneously hear each other and participate during the meeting.

Section 5. Quorum

A majority of the Board of Directors shall constitute a quorum at a meeting of the board.

Section 6. Liability

A member of the Board of Directors shall not be liable to the membership for monetary damages for an act taken or an omission in their official capacity as a board member, except that this provision does not eliminate or limit the liability of a board member for:

1. A breach of a board member's duty of loyalty to TRTA or its members;
2. An act or omission not in good faith or that involves intentional misconduct or knowing violation of law;
3. A transaction from which a board member receives an improper benefit, whether or not the benefit results from an action taken within the scope of the board member's office;
4. An act or omission for which the liability of a board member is expressly provided by statute; or
5. An act related to an unlawful stock repurchase or payment of a dividend.

Section 7. Removal from Legislator Coordinator

The Legislative Coordinator, a position filled by appointment of the President, may be removed from the Board of Directors for the inability to perform duties or for non-performance of duties as prescribed in policies, by a two-thirds vote of those present at a regular meeting of the Board of Directors, with a quorum present, when previous written notice has been given.

Article VII. State Executive Committee

Section 1. Executive Committee

The Executive Committee shall be the President, President-Elect, Vice-President, Secretary/Treasurer, and the Immediate Past President.

Section 2. Responsibilities

The Executive Committee shall, in the interim between meetings of the Board of Directors, exercise all powers of the Board of Directors, provided that nothing shall be done contrary to the policies adopted by the Board of Directors or to any action of the Board of Directors. The Executive Committee will confirm the President's appointments

of the Legislative Coordinator, and the Standing Committee Chairs and members, except for the Chairs of the Communications, Finance, and Membership/Volunteer Services/Community Involvement Committees.

Section 3. Meetings

Meetings of the Executive Committee shall be at the call of the President or shall be at the request of three (3) members of the Executive Committee. The Executive Committee may meet via electronic communications media as directed by the President and the Executive Director so long as all members can simultaneously hear each other and participate during the meeting.

Section 4. Quorum

Three (3) members shall constitute a quorum at a meeting of the Executive Committee.

Article VIII. State Committees

Section 1. Standing Committees

The following Standing committees shall be held by the organization: Communications, Finance, Historian, Legislative, Member Benefits, Membership/Volunteer Services/Community Involvement, Organizational Affairs, and Retirement Education. Committee Chairs are required to be members of a Chapter and be receiving an annuity from the Teacher Retirement System of Texas. The President-Elect shall be the Membership/Volunteer Services/Community Involvement Committee Chair, the Vice-President shall be the Communications Committee Chair, and the Secretary/Treasurer shall be the Finance Committee Chair.

Section 2. Members

Except for the Legislative Committee, all Standing Committees shall be composed of a maximum of five (5) members including the Chair and may serve a maximum of four (4) years. The Legislative Committee shall be composed of a minimum of twenty (20) members and its members may serve a maximum term of eight (8) years.

Section 3. Special Committees

The President may appoint Special Committees, with approval of the Board of Directors, as needed.

Section 4. Meetings

Committees shall meet as directed by the President or by the Committee Chair. Committees may meet in person, via teleconference or through other electronic communications media so long as all the members can simultaneously hear each other and participate during the meeting.

Article IX. District Presidents Council

Section 1. District Presidents Council

The District Presidents Council shall consist of the twenty (20) District Presidents.

Section 2. Responsibilities

The District Presidents Council shall elect three (3) Officers that will serve on the Board of Directors. The District Presidents Council Officers shall be a Chair, Vice-Chair, and Recorder.

Section 3. Terms and Vacancies

The District Presidents Council Officers are elected for two-year terms, coinciding with the fiscal year, with no subsequent consecutive terms. District Presidents Council Officer vacancies shall be filled by current District Presidents.

Section 4. Removal from Office

District Presidents Council Officers can be removed from office only for cause by a two-thirds vote of those present at a regular meeting of the Board of Directors, with a quorum present, when previous written notice has been given.

Article X. Districts

The Districts, as established by TRTA, shall follow and implement TRTA standing rules. Each District shall provide leadership to and communication with the Chapters. Elected District Officers and Committee Chairs are required to be members of a Chapter within that District. Elected District Officers shall be receiving an annuity from the Teacher Retirement System of Texas.

Section 1. District Officers

The Districts shall have a minimum of five (5) Officers: President, First Vice-President, Second Vice-President, Secretary, and Treasurer. If circumstances prevent an in-person meeting, election of Officers may be conducted electronically.

Section 2. District Committees

The Districts shall have a minimum of six (6) Committees: Communications, Historian, Legislative, Member Benefits, Membership/Volunteer Services/Community Involvement, and Retirement Education. The First Vice-President shall be the Membership/Volunteer Services/Community Involvement Committee Chair and the Second Vice-President shall be the Communications Committee Chair.

Section 3. Conferences

The Districts may conduct two (2) conferences per year for the purpose of offering resources to elected Chapter Officers and appointed Committee Chairs. Districts may meet via electronic communications media so long as all members can simultaneously hear each other and participate during the meeting.

Article XI. Chapters

Each Chapter meeting the following requirements established by the Board of Directors shall be issued a TRTA certificate of affiliation:

1. Adoption of standing rules not in conflict with the bylaws or policies of TRTA;
2. A minimum of five (5) regular meetings per year; and
3. All elected Officers and Committee Chairs must be members of the Chapter and of TRTA.

Section 1. Chapter Officers

The Chapters shall have a minimum of five (5) Officers: President, First Vice-President, Second Vice-President, Secretary, and Treasurer. If circumstances prevent an in-person meeting, election of officers may be conducted electronically.

Section 2. Chapter Committees

The Chapters shall have a minimum of five (5) Committees: Communications, Legislative, Member Benefits, Membership/Volunteer Services/Community Involvement, and Retirement Education. The First Vice-President shall be the Membership/Volunteer Services/Community Involvement Committee Chair and the Second Vice-President shall be the Communications Committee Chair.

Section 3. Meetings

The Chapters shall conduct a minimum of five (5) regular meetings per year. Chapters may meet via electronic communications media so long as all members can simultaneously hear each other and participate during the meeting.

Article XII. Executive Director

The Executive Director shall serve as the Chief Administrative Officer of TRTA, transacting all necessary business affairs of the organization and performing such duties as required by the Board of Directors.

Article XIII. State Events

The Board of Directors shall determine the time and place of the meeting of the House of Delegates, Convention, and Day at the Capitol, and any other events as needed. In situations which make in-person meetings impossible or impractical, TRTA may help arrange virtual visits by electronic communication media.

Article XIV. House of Delegates

The House of Delegates shall meet in even-numbered years for the purpose of electing Officers and amending bylaws.

Section 1. State Delegates

The delegates shall consist of the Board of Directors, Standing Committees Chairs, and Past Presidents.

Section 2. District Delegates

The delegates shall consist of the Presidents, First Vice-Presidents, Second Vice-Presidents, Secretaries, and Treasurers. Alternates may be appointed by the District Presidents when the elected Officers cannot attend. Delegates must be receiving an annuity from the Teacher Retirement System of Texas.

Section 3. Chapter Delegates

The delegates shall be determined by:

1. Two (2) delegates for the first 100 members in a Chapter or fraction thereof;
2. One (1) delegate for each additional 100 members in a Chapter or fraction thereof; and
3. Delegates must be receiving an annuity from the Teacher Retirement System of Texas.

Article XV: Parliamentary Authority

Robert's Rules of Order Newly Revised (latest edition) shall govern meetings when not in conflict with the organization's bylaws and policies. The Board of Directors shall engage a parliamentarian to assist the Board and the House of Delegates.

Article XVI. Amendments

The House of Delegates may amend the bylaws in even-numbered years by a two-thirds vote, provided that the members have been given notice of the proposed amendment through communications at least 30 days prior to the House of Delegates or a three-fourths vote if members have not been given such notice. All amendments shall become effective July 1 following the House of Delegates unless otherwise stated as a proviso with the proposed amendment.

Section 1. Submittal Process

Proposed bylaws amendments to be considered by the House of Delegates shall be submitted to the TRTA office by a date specified by the Board of Directors. Proposed bylaws amendments may originate from a District, Chapter, the Board of Directors, or the Organizational Affairs Committee when authorized by the Board of Directors.

The Board of Directors shall submit all proposed bylaws amendments to the House of Delegates. The proposals will include the Board of Directors and the Organizational Affairs Committee recommendations and rationales.

Section 2. Organizational Affairs Committee Proposals

The Organizational Affairs Committee shall study each submitted proposal and determine its potential impact on the operation of TRTA and other articles in the bylaws. The Organizational Affairs Committee will also:

1. Edit and format the proposal with the approval of the author of the proposed amendment;
2. Recommend approval, disapproval, or continued study; and
3. Forward the proposal and recommendations to the Board of Directors by January 1.

Last amended March 25, 2026

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TRTA POLICIES



**As Adopted by the Board of Directors
May 13, 2026**

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Section 1. Organizational Foundations (reference TRTA Bylaws, Articles II, and III)

Purposes and Objectives

The purpose of the Texas Retired Teachers Association (TRTA) is to promote the preservation and maintenance of the Teacher Retirement System of Texas (TRS) Pension Trust Fund, as established in Article XVI, Section 67 of the Constitution of the State of Texas. To accomplish this, TRTA shall encourage the Texas Legislature and the TRS Board of Trustees to ensure that the Pension Trust Fund is preserved to pay, upon retirement, annuities and future annuity increases to the retired members of TRS, and work with the Texas Legislature and the United States Congress to protect, promote, and defend the interests of all TRS Texas members.

The objectives of TRTA shall be to promote the professional, economic, intellectual, social, and healthy well-being of retired school personnel, while maintaining a functional and united organization. To accomplish these objectives, TRTA will provide guidance to Chapters of TRTA. TRTA will also network with associations of retired and active school personnel, as well as with other associations of retired persons in solving problems of mutual concern. TRTA will encourage retired school personnel to give voluntarily of their time, talents, training, and experience in the furtherance of education and civic endeavors in the community, the state, and the nation.

1. Code of Ethics

All members of TRTA are expected to:

- a. Act in a loyal manner toward TRTA, by supporting its efforts to maintain and improve benefits for members of the Teacher Retirement System of Texas;
- b. Show faith in the teaching profession, by supporting active and retired school personnel to warrant worthiness of a reputation for quality of service;
- c. Give voluntarily of time, talents, training, and experience in the furtherance of education and civic endeavors;
- d. Unite TRTA Districts and affiliated Chapters of retired school personnel in a bond of friendship, fellowship, and mutual understanding; and
- e. Provide for open discussion on matters of public interest, without public debate of partisan politics or sectarian religions.
- f. It is required that members of the Board of Directors, State Committee Chairs, and members of the Finance Committee sign a nondisclosure agreement.

2. Conflict of Interest

Members of the Board of Directors, Standing and Special Committees, and staff shall avoid any real or perceived conflicts of interest. They shall not engage in activities that create a conflict of interest between their assigned functions and other interests or obligations. They shall not participate in any decision making where there is a conflict of interest.

Except (1) as provided in agreements between TRTA and AMBA, whereby AMBA sponsors and/or funds certain named events and activities with TRTA, or (2) as expressly approved in advance, in writing, by the Executive Committee, no TRTA District or Chapter Officer, Committee member or staff member shall accept any amenity or gratuity from a business entity or organization doing business with or contemplating doing business with TRTA.

3. Political Nonpartisanship

The leadership, particularly the Legislative Coordinator and the Executive Director, shall monitor legislative and political activity and shall inform the Board of Directors and the membership when they believe or anticipate that action needs to occur. The focus shall be on, but not limited to, activity related to retired and active public-school personnel. TRTA shall not endorse candidates for any political office.

4. Sponsored Benefits

Benefits shall be considered for sponsorship by the Board of Directors in response to a recommendation by the Executive Director. The recommendation shall be the result of an investigation by the Executive Director which includes consideration of the following:

- a. Financial viability supported by financial statements and or public trading rating;
- b. Status of any previous or pending lawsuits;
- c. An organizational history of conducting business in Texas, and other applicable states, with focus on unresolved complaints or issues according to regulatory agencies;
- d. A review of the expected "user friendly" operational process with members, including a marketing plan to meet the need of members;

- e. A proposed process to provide TRTA with indication of responding to complaints;
- f. Provision to current customer organizations, including educator organizations, with contract information;
- g. Compliance in concluding a contract or letter of agreement including a TRTA cancellation for cause clause and allowance for TRTA disclaimer language;
- h. Offer a benefit that anticipates members use;
- i. Indication of any residual to be paid to TRTA with details for payment;
- j. A tracking system of members use of the product; and
- k. Willingness to accept first opportunity to exhibit at the state events.

5. Cooperation with Other Organizations

TRTA shall cooperate with other organizations in programs and issues of common concern. The Board of Directors shall be kept informed about such cooperative efforts.

6. Indemnification

The Board of Directors shall indemnify its Officers, directors and employees if any such person was or is a party, or is threatened to be made a party, to any threatened, pending or completed legal action, suit or proceeding, whether civil, criminal, administrative or investigative, by reason of his or her actions or omissions within the scope of his or her official capacity as a director, Officer or employee of the board, against expenses (including attorneys' fees), judgments, fines and amounts paid in settlement actually and reasonably incurred by him or her in connection with such action, suit or proceeding.

The board will indemnify a person only if he or she acted in good faith and reasonably believed that his or her conduct was in the board's best interest, and/or if he or she had no reasonable cause to believe that the conduct was unlawful or that it was not in compliance with the policies. Such right of indemnification shall not be deemed exclusive or any other rights to which such person may be entitled under the bylaws, or under any agreement, vote of members or otherwise.

Section 2. Membership (reference *TRTA Bylaws*, Article IV)

According to the *TRTA Bylaws*, to be eligible for membership, upon payment of State dues, one must be an annuitant or a beneficiary receiving an annuity from a teacher retirement system; or any person interested in public education and willing to work to achieve the objectives of TRTA.

1. Membership Dues

Membership dues are \$35 per year (or \$2.92 per month) through June 30, 2027. The TRTA Board of Directors can recommend a change in dues, subject to ratification by the House of Delegates. TRTA shall permit members to pay dues annually via check, credit card, or annual bank draft directly to TRTA, or via check through an affiliated Chapter; or monthly at a rate of \$2.92 through payroll deduction via the Teacher Retirement System of Texas or TRTA's affiliate partner Association Member Benefits Advisors (AMBA) using the RAMP credit card system. For membership year beginning July 1, 2027, dues are \$48 per year or \$4.00 per month.

2. State Incentive Rebate Program

Districts shall receive \$3.00 per member (exclusive of life members) on the membership roll at the close of each membership year on February 28. Chapters shall receive an incentive rebate of \$10 per member increase over the previous year. Allocations and rebates are paid as soon as possible after the end of each fiscal year on June 30.

3. Privacy of Information

- a. No TRTA Officer or employee shall distribute lists of TRTA members except upon approval from the Executive Director. TRTA shall not release its membership list or the name of any member to political candidates, current office holders or representatives of political parties.
- b. TRTA will not disclose member email addresses to anyone other than TRTA-affiliated entities or TRTA's contracted third party administrator.

Section 3. State Officers (reference *TRTA Bylaws*, Article V)

1. Qualifications for Running for TRTA State Office

According to the *TRTA Bylaws*, to qualify to run for TRTA State office, members must receive an annuity from the Teacher Retirement System of Texas, have been in a Chapter for at least three (3) years, and have served as an elected Officer of a District or Chapter, but need not have served as a statewide Officer.

2. Guidelines for Filing for TRTA State Office

Nominations for Officers will be solicited in the third issue of *The VOICE*. The filing form is available on the TRTA website or by contacting the TRTA office. Applicants should submit their filing form and a digital image to the TRTA office no later than January 15 for inclusion in *The VOICE*. Upon verification of the qualifications for office, candidate information will be published in the first quarter of *The VOICE* in the order in which filing forms were submitted. An Officers handbook will be distributed to each candidate. A workshop conducted via Zoom for potential Officers may be provided.

3. Campaign Procedures

The following procedures for candidates running for office are:

- a. Whether announced or unannounced as a candidate for a TRTA office, the campaigning period shall begin 90 days prior to the start of the meeting of the House of Delegates and conclude upon the election of Officers;
- b. TRTA shall not pay campaign expenses incurred for any candidate;
- c. During the campaign period, a sitting Officer who has an opponent may not use financially reimbursed assignments to District and Chapter meetings for campaign purposes;
- d. Candidates, their Chapter, or their District may send campaign materials to other Chapters and Districts and to the Board of Directors;
- e. Name and address mailing labels of District and Chapter Presidents and the Board of Directors may be provided to candidates upon written request to the Executive Director. A payment of \$50 is required. The request must indicate that the label information will be used only in the campaign for the current office sought;
- f. The TRTA office may email, upon request from the candidate, campaign materials to the delegates;
- g. A slate of Officer nominations will be presented prior to the meeting of the House of Delegates; and
- h. TRTA shall not endorse any candidate.

4. Election of State Officers

The House of Delegates shall elect the Officers by secret ballot. A majority vote shall elect. If no majority vote is achieved, a run-off election shall be conducted between the two (2) candidates receiving the most votes. If there is only one (1) nominee for an office, a vote for that office may be by voice.

5. State Officers Installations

Officers may be installed during the TRTA House of Delegates at which they are elected.

6. State President Transition

Officers are elected by the House of Delegates in even-numbered years. For a smooth transition, the person elected to serve as President (referred to as incoming President) will need to make the following decisions before July 1:

- a. The incoming President will immediately begin working with the TRTA staff to plan State events and meetings for the upcoming year;
- b. The incoming President will communicate with the current President of any future activities;
- c. The incoming President will meet with the Officers and Standing Committee Chairs after the June Board of Directors meeting;
- d. The incoming President will prepare a list including Legislative Coordinator, Standing Committee Chairs; and members appointments for confirmation by the June Executive Committee meeting or as soon as possible.

7. President

- a. Preside at Board of Directors and Executive Committee meetings, and other meetings appropriate to the office;
- b. Communicate and follow up regularly and respond to all emails and phone calls from all Officers, Standing Committee Chairs, and members to ensure that responsibilities are being met;
- c. Schedule meetings of the Board of Directors and the Executive Committee;
- d. Consult with the Executive Director in the preparation of agendas for regular and special meetings of the Board of Directors and the Executive Committee;
- e. Maintain a working relationship with other organizations having similar interests and determine any representation at events of those organizations;
- f. Appoint Standing Committee Chairs and all State Committee members;
- g. Assume an active role in legislative activities;
- h. Monitor the status of Districts and Chapters, and support their efforts;
- i. Be responsible for the awards program and determine any special recognitions; and
- j. Perform other assigned duties to fulfill the objectives of TRTA.

8. President-Elect

- a. Preside at appropriate meetings in the absence of, or at the request of, the President;
- b. Serve as the Chair of the Membership/Volunteer Services/Community Involvement Committee;
- c. Serve as a membership resource to assist Districts and Chapters; and
- d. Perform other assigned duties to fulfill the objectives of TRTA.

9. Vice-President

- a. Preside at appropriate meetings in the absence of both the President and President-Elect, or at the request of the President;
- b. Serve as the Chair of the Communications Committee;
- c. Coordinate and promote the Children's Book Project;
- d. Promote TRTA and collaborate with other Committees and Officers;
- e. Serve as a communications resource to assist Districts and Chapters;
- f. Review and confirm applications for the E.L. Galyean Service Award, collecting additional information if necessary, then present applications at the January Board of Directors meeting; and
- g. Perform other assigned duties to fulfill the objectives of TRTA.

10. Secretary/Treasurer

- a. Record, or cause to be recorded, the proceedings of the Executive Committee and the Board of Directors;
- b. Serve as the Finance Committee Chair;
- c. Direct the Finance Committee in its work with the TRTA staff to prepare an annual budget;
- d. Review financial reports and annual financial statements prepared and presented by the TRTA staff at the Board of Directors regularly scheduled meetings;
- e. Serve as a finance resource to assist Districts and Chapters; and
- f. Perform other assigned duties to fulfill the objectives of TRTA.

11. District Presidents Council Representatives

Representatives from the District Presidents Council shall be the current District Presidents Council Chair, Vice– Chair and Recorder.

12. Vacancy of the Immediate Past President

If there is a vacancy in the office of the Immediate Past President, the President shall appoint, with the Board of Directors' approval, a TRTA Past President to serve as the Immediate Past President.

13. Completion of Service of the State President

TRTA membership shall be conferred for life upon the completion of service in the office of State President.

Section 4. Board of Directors (reference *TRTA Bylaws*, Article VI)

1. Meetings

Prior to July 15 each year, the Board of Directors will meet for the purpose of approving the annual budget and to conduct other business.

2. Policies

Policies may be amended at any time by a majority vote of the Board of Directors.

3. Minutes

Staff shall send each director a draft copy of the Board of Directors meeting minutes within thirty days of the meeting. Once approved, minutes signed and dated by the President and the Secretary/Treasurer shall be filed in the TRTA office. Signed and dated minutes shall be the official record of Board of Directors and Executive Committee meetings. A report of the action items in the minutes shall be sent to the Board of Directors, and to the Presidents of Districts and Chapters. Electronic recording of any TRTA meeting shall be limited to the staff recording for minutes' purposes. Such recording shall be destroyed upon approval of the minutes, when applicable.

4. Master Calendar

The Board of Directors and Executive Director shall provide information about speaking engagements accepted. This information shall be maintained on a master calendar. Chapter invitations, for a TRTA representative to address the Chapter, shall be assigned to the Executive Director or Officer requested. The calendar shall include any meeting scheduled, including Zoom, if not using the TRTA account.

5. Grounds for Removal from office

According to the bylaws, an Officer can be removed from office only for cause by a two-thirds vote of those present at a regular meeting of the Board of Directors, with a quorum present, when previous written notice has been given. Evaluation of a Board of Directors member's inability to perform duties or for non-performance of duties shall be as indicated by:

- a. A physical, mental or other condition preventing performance of duties as prescribed in the bylaws or policies, and/or
- b. Unexcused absences from two consecutive regularly scheduled Board of Directors meetings.

6. Process for Notification and Removal

- a. The President shall notify the Board of Directors and the non-complying board member, other than the President, of the specific non-compliance in performance of duties or non-attendance at regularly scheduled Board of Directors meetings. Remediation expectations shall be included in the notices. The President shall notify the Board of Directors of continuation of the non-compliance, or additional non-compliance, with a recommendation of removal from office. The Board of Directors shall forward a copy of the recommendation, to the member, with a request for a written response within thirty days. Upon review of the response, or if no response is received, the Board of Directors may affirm the member's removal from office.
- b. An elected Officer shall notify the Board of Directors of the President's specific non-compliance of duties or nonattendance at regularly scheduled Board of Directors meetings. Remediation expectations shall be included in the notices. The Board of Directors shall appoint an elected Officer to monitor the specified non-compliance, or additional non-compliance, and provide a recommendation to the Board of Directors. The Board of Directors shall notify the President about specifics of the recommendation and request a written response within thirty days. Upon review of the response, or if no response is received, the Board of Directors may affirm the President's removal.
- c. The Board of Directors member who is purported to be in non-compliance shall be allowed to address the Board of Directors.

7. Immediate Past President

- a. Serve as advisor to the President, the TRTA Executive Committee, and the TRTA Board of Directors;
- b. Attend designated functions;
- c. Present slate of Officer nominations to the House of Delegates;
- d. Serve as a resource to assist Districts and Chapters; and
- e. Perform other assigned duties to fulfill the objectives of TRTA.

8. Legislative Coordinator

The TRTA Legislative Coordinator is recommended by the TRTA President with the approval of the Executive Committee, while working under the direction of the TRTA Executive Director. The Legislative Coordinator shall:

- a. Serve as a voting member of the Board of Directors;
- b. Work with the Executive Director, Capitol Team, and State Legislative Committee to implement state and federal priorities;
- c. Attend meetings with Texas State House and Senate members and congressional members and/or staff to advocate for approved association state and federal policy objectives as directed;
- d. Attend House and Senate committee hearings and provide public testimony as directed;
- e. Be aware of proposed legislation impacting TRS retirees;
- f. Attend TRS Board meetings as needed; and
- g. May serve as TRTA Legislative Committee Chair.

9. Legal Counsel

The TRTA Board of Directors will hire an attorney on retainer or hourly rate to advise and counsel the Board of Directors, Executive Committee and Executive Director in all legal matters including contracts, agreements and policy. Counsel will be available in person or electronically (virtually or by email or text, at TRTA's discretion.)

The President and Executive Director will have direct access to the legal counsel. The fee will be determined annually and placed in the budget under consultants with a designation for legal counsel.

10. Board of Directors Meeting at TRTA State Events

The Board of Directors shall meet at the TRTA State events.

Section 5. Executive Committee (reference TRTA Bylaws, Article VII)

The Executive Committee will review and approve changes in the *TRTA Leadership Manual* annually.

Section 6. Committees (reference TRTA Bylaws, Article VIII)

1. Committee Responsibility

All Committee Chairs and Committee members shall be directly responsible to the Board of Directors.

2. Support of District and Chapter Committees

Each Standing Committee shall support the work of those Committees at the District and Chapter levels. Each Committee shall meet with their District counterparts when necessary.

3. Chairs of Standing Committees

With the exception of the Legislative Committee, all Standing Committees shall be composed of a maximum of five (5) members including the Chair. The TRTA President, after consulting with each Standing Committee Chair, shall appoint Committee members, giving consideration to gender balance and ethnic representation. Every effort will be made to ensure that at least 50 percent of the Committee members are continuing Committee members. Members may serve a maximum of four (4) years.

4. Transition

Each Standing Committee Chair completing his/her term of office shall provide appropriate Committee information and materials to the newly appointed Chair prior to July 1.

5. Legislative Committee Members

The Legislative Committee shall be composed of a minimum of twenty (20) members and every effort will be made to ensure that at least 75 percent of the Committee members are continuing Committee members. Members may serve a maximum term of eight (8) years.

Section 7. District Presidents Council (reference TRTA Bylaws, Article IX)

1. Composition

The District Presidents Council shall be composed of the twenty District Presidents. The Chair, Vice-Chair and Recorder shall be elected by the District Presidents Council. The District Presidents Council Officers will be elected every two years and serve two-year terms.

2. Election Process

The election of the TRTA District Presidents Council Officers will be held before the first Board of Directors meeting of the membership year. The President will conduct the election of the District Presidents Council Chair. Nominations are made from the floor and when nominations close, a secret ballot is used unless there is only one nominee. Following the election of the District Presidents Council Chair, the President will turn the meeting over to that individual to conduct the election of the Vice-Chair and the Recorder. Nominations for each position are taken from the floor and if there is more than one nominee, the election is held by secret ballot. If circumstances prevent in-person balloting, the election may be conducted electronically.

3. Filling Vacancies

Methods of filling vacancies during a current term are described in *TRTA Bylaws*, Article IX, Section 3.

4. Chair

- a. Preside at meetings of the twenty District Presidents as scheduled;
- b. Maintain periodic communication with the nineteen other District Presidents regarding TRTA Board activities and other information as needed;
- c. Provide support to District Presidents in fulfilling their duties as leaders in their Districts; and
- d. Represent the council on the Board of Directors.

5. Vice-Chair

- a. Preside at meetings of the District Presidents Council in the absence of the Chair;
- b. Provide support to District Presidents in fulfilling their duties as leaders in their Districts.

6. Recorder

- a. Record, or cause to be recorded, the proceedings of District Presidents Council meetings;
- b. Provide the TRTA Board of Directors, TRTA office and the other District Presidents with a copy of council meetings summaries; and
- c. Provide support to District Presidents in fulfilling their duties as leaders of their Districts.

Section 8. Districts (reference *TRTA Bylaws*, Article X)

1. Requirements

Districts shall serve as conduits of information from TRTA to members of Chapters. Districts shall finance any individual District meetings conducted during TRTA State events.

2. Officers

Each District shall elect a President, First Vice–President, Second Vice–President, Secretary and Treasurer at its District Fall Conference in odd-numbered years. A District may elect additional Officers.

3. Committees

A District may appoint Committees in addition to those required in the *TRTA Bylaws*.

4. District Fall and Spring Conferences

According to the bylaws, Districts may conduct two (2) conferences (fall and spring) per year. Districts may conduct up to four conferences within a two-year cycle. Conferences may be conducted via electronic communications media so long as all members can simultaneously hear each other and participate. It is required that all TRTA Districts follow the guidelines listed below. District conference reimbursement may be used for either the fall or the spring, but for only one conference during the fiscal year (July 1-June 30).

A. Each District may conduct a Fall Conference in even–numbered years. The meeting shall be open to all TRTA members in the District and shall be for the purpose of:

- a. Preparing Chapters for the upcoming legislative session and Day at the Capitol that will occur in the odd–numbered year;
- b. Discussing issues with a TRTA Board of Directors member;
- c. Motivating networking among Chapter leaders;
- d. Considering proposed TRTA Bylaws changes originating within the District; and
- e. Receiving reports from District Committee Chairs.

B. Each District may conduct a Spring Conference in even–numbered years for the purpose of:

- a. Providing resources and other materials to elected Officers and Committee Chairs of Chapters; and
- b. Networking with fellow Officer and Chairs from other Chapters.

C. Each District may conduct a Fall Conference in odd–numbered years. The meeting shall be open to all TRTA members in the District and shall be for the purpose of:

- a. Electing Officers to serve a two-year term; and
- b. Motivating networking among Chapters.

D. Each District may conduct a Spring Conference in odd–numbered years. The meeting shall be open to all TRTA members in the District and shall be for the purpose of:

- a. Forming a Nominating Committee;
- b. Motivating networking among Chapters; and
- c. Sharing ideas and event reports.

To ensure that each conference is afforded the appropriate level of attention, one of the following may attend: the TRTA Executive Director, a staff member or a State Officer.

5. Limitations

Districts may use the TRTA Logo only when fulfilling the objectives of TRTA. (See *TRTA Style Guide* in the *TRTA Leadership Manual*).

6. General Liability Insurance

TRTA has secured a general liability insurance policy to cover the Districts for a District meeting. If the venue requires proof of liability, the District must notify the TRTA Deputy Director that an insurance certificate is needed no later than two weeks before the event. Information needed to obtain the certificate is:

1. Date(s) of the meeting
2. Official full name of the meeting site (ie. First Methodist Church; Arlington Civic Center, etc.);
3. Physical address of the meeting site;
4. Contact information at the meeting site:
 - Name
 - Phone number
 - Email address and fax number
5. Person's name, if the certificate is to be sent to attention of a specific person; and
6. District number

Section 9. Chapters (reference *TRTA Bylaws*, Article XI)

1. Membership

If an affiliated Chapter is organized after January 1 of any fiscal year, TRTA membership dues received from its members shall be for that fiscal year, as well as being credited to the following fiscal year. The Treasurer of each affiliated Chapter shall forward any TRTA dues to the TRTA administrative office by the end of each month, except for new membership dues received in January or February which the Treasurer shall submit to the TRTA administrative office in March.

2. Tax Reporting Options

Any Chapter that has not completed the tax reporting options forms (TR-1 and TR-2) by February 28 will be at risk for dissolution. The TRTA Board of Directors shall be informed about the possible dissolution before it occurs.

3. Officers

The election of Officers shall be conducted in sufficient time to send the Officers to the Spring Conference in the respective TRTA District.

4. Committees

The appointment of Committee Chairs shall be completed after the election of Officers for the Chapter, but in sufficient time to send the Committee Chairs to the Spring Conference in the respective TRTA District. A Chapter may appoint additional Committees as necessary. The Chapters shall have a minimum of five (5) Committees: Communications, Legislative, Member Benefits, Membership/Volunteer Services/Community Involvement, and Retirement Education. The First Vice-President shall be the Membership/Volunteer Services/Community Involvement Committee Chair and the Second Vice-President shall be the Communications Committee Chair.

5. Limitations

Affiliated Chapters may use the TRTA Logo or acronym only when fulfilling the objectives of TRTA. (See *TRTA Style Guide* in the *TRTA Leadership Manual*).

6. General Liability Insurance

TRTA has secured a general liability insurance policy to cover the Chapters for a meeting. If the venue requires proof of the liability, the Chapter must notify the TRTA Deputy Director that an insurance certificate is needed no later than two weeks before the event. Information needed to obtain the certificate is:

1. Date(s) of the meeting
2. Official full name of the meeting site (ie. First Methodist Church; Arlington Civic Center, etc.);
3. Physical address of the meeting site;
4. Contact information at the meeting site:
 - Name
 - Phone number
 - Email address and fax number
5. Person's name, if the certificate is to be sent to attention of a specific person; and
6. District number/Chapter name

7. District Affiliation

The occasion may arise where a Chapter will want (or need) to change their District affiliation. The Chapter must meet and vote on the change. This must be recorded in the minutes of the Chapter. The District Presidents of both Districts—receiving and leaving—must be notified in writing of the decision of the Chapter. Each District President will take the issue to their Executive Committee. Each District President will notify the Chapter and the other District President of the decision of their respective Executive Committees. If both Districts agree to the request, the Chapter may then change Districts. The District President of the receiving District will notify the TRTA Board of Directors for approval.

Section 10. Executive Director (reference TRTA Bylaws, Article XII)

The duties of the Executive Director, additional duties indicated in the *TRTA Bylaws*, shall be described and adopted by the Board of Directors.

1. Annual Review and Evaluation

- a. Prior to the June board meeting, each Board member may compile a set of questions for and comments about the Executive Director's performance during the preceding year.
- b. In Executive Session during the June board meeting:
 - Board members, in the absence of the Executive Director, by consensus, will determine a final set of questions for and comments about the Executive Director's performance during the preceding year, to be shared with the Executive Director. The Executive Director will then present orally a self-evaluation, respond to the compiled questions, and reply to the compiled comments. Board members may ask follow-up questions and make additional remarks.
 - The Executive Director will then be dismissed, and the Board will prepare a draft narrative, outlining areas of success and any areas that require attention.
 - The Board will also take under advisement the Executive Director's compensation for the coming year and determine any changes to be made. In making that determination, the Board will consider the compensation of other similarly situated Executive Directors to the degree it can reasonably obtain that information.
- c. In regular session during the June board meeting, the President will entertain any motions needed regarding the Executive Director's compensation.
- d. The President, or designee, will prepare the final written narrative of the Executive Director's evaluation, as agreed upon by the Board, and the President, or designee, will share the final evaluation in conference with the Executive Director. Both will sign the evaluation.
- e. A copy of the evaluation will be given to the Executive Director and one copy will be placed in the Executive Director's personnel file.

Section 11. State Events (reference TRTA Bylaws, Article XIII)

1. Sites and Dates

Based upon recommendations from the TRTA staff, the Board of Directors will determine the site and date of each State event.

2. Registration Fee

The TRTA Board of Directors shall set the registration fee for the State events.

3. Delegates

Each Chapter shall determine its own method for selecting the delegates from the Chapter. According to the bylaws, delegates must be receiving an annuity from the Teacher Retirement System of Texas.

4. Voting

No delegate shall vote in more than one capacity.

5. House of Delegates Committees

The President shall appoint members to the Tellers and Minutes Approval Committees when needed.

6. State Past Presidents not currently serving on the TRTA Board of Directors

State Past Presidents not currently serving on the TRTA Board of Directors shall have State events and related travel expenses reimbursed in accordance with the guidelines listed in the TRTA Policies.

A State Past President's spouse will also be reimbursed for State events expenses in accordance with this section. TRTA will reimburse mileage for the Past President to and from the TRTA State events in accordance with mileage reimbursement policies and rates, or shall pay the cost of airfare for the Past President and spouse.

7. Surviving spouses of State Past Presidents not currently serving on the TRTA Board of Directors

The spouse of a deceased State Past President or Executive Director emeritus shall have State events and related travel expenses reimbursed in accordance with the guidelines listed in the TRTA Policies.

8. State Events Expenses Guidelines

Guidelines will be reviewed each year and subject to change on the advice of the Executive Committee. Registration Fee and all meals (including requested ticketed meal functions) are paid by TRTA for the following:

- a. TRTA Board of Directors
- b. TRTA Standing Committee Chairs
- c. TRTA Past Presidents
- d. Spouse of a deceased Past TRTA President
- e. TRTA Executive Director Emeritus and Spouse

9. Tellers Committee

TRTA will supply a noon meal for the TRTA Tellers Committee, if necessary.

10. Meal Allowance

- a. Spouses/partners of groups a–d will have a daily day meal allowance at an amount approved by the Board of Directors. Note: Spouses/partners of groups a–d must pay registration fees and for all ticketed meal functions.
- b. Banquet tickets for the E. L. Galyean Award recipient and one guest will be provided by TRTA.

11. Room, room tax, and parking is paid by TRTA for the following:

- a. TRTA Board of Directors
- b. TRTA Standing Committee Chairs
- c. TRTA Past Presidents
- d. Spouse of a deceased Past TRTA President
- e. TRTA Executive Director Emeritus
- f. E. L. Galyean Award Recipient
- g. Guest(s) of the above Recipient (one room for one night only)
- h. Room, room tax, meals, and parking are paid by TRTA for all staff members.
- i. Room, room tax, and parking for speakers and entertainment are paid by TRTA with approval from the Executive Director.
- j. Registration fees are required for host District volunteers attending State events activities.
- k. Parking for State events sponsors and vendors/exhibitors will be paid by TRTA pending the approval of the Executive Director.

12. Non-TRTA Conventions and Events Guidelines

TRTA Officers and/or staff may attend a limited number of conventions and events held by other associations and businesses to represent and promote TRTA. These representatives may procure exhibit space to distribute marketing materials and solicit membership in the organization. Participation must be approved by the TRTA Executive Director. Officers or staff attending such events may request marketing materials from the State office for use in the exhibit space.

Business expenses incurred by attending such events such as mileage, lodging, and meals will be reimbursed by TRTA upon submittal of a travel voucher to the TRTA Deputy Director. Officers and/or staff attending an event are asked to follow event guidelines set by the sponsoring entity, including presentation hours.

13. Day at the Capitol

The Board of Directors shall determine the time and place of the TRTA Day at the Capitol in odd-numbered years during the Texas Legislative Session for the purpose of:

- a. Advocating for improved benefits for all Texas public education retirees;
- b. Supporting legislation filed during the legislative session that will protect and improve benefits for Texas public education retirees;
- c. Providing an opportunity for all TRTA members and members of the community who support Texas retired educators to meet with their legislators and to be recognized by the Senate and the House;

- d. Providing opportunities for social interaction with other TRTA members present; and
- e. At the discretion of the President, an invitation will be provided to members of the Board of Directors and Past President to attend the Day at the Capitol event with accommodations to be paid by TRTA.

Section 12. House of Delegates (Reference TRTA Bylaws, Article XIV)

As stated in the *TRTA Bylaws*, the House of Delegates shall meet in even-numbered years for the purpose of electing Officers and amending bylaws.

Section 1. State Delegates

As stated in the *TRTA Bylaws*, the delegates shall consist of the Board of Directors, Standing Committees Chairs, and Past Presidents.

Section 2. District Delegates

As stated in the *TRTA Bylaws*, the delegates shall consist of the Presidents, First Vice-Presidents, Second Vice-Presidents, Secretaries, and Treasurers. Alternates may be appointed by the District Presidents when the elected Officers cannot attend. Delegates must be receiving an annuity from the Teacher Retirement System of Texas.

Section 3. Chapter Delegates

As stated in the *TRTA Bylaws*, the delegates shall be determined by:

- a. Two (2) delegates for the first 100 members in a Chapter or fraction thereof;
- b. One (1) delegate for each additional 100 members in a Chapter or fraction thereof; and
- c. Delegates must be receiving an annuity from the Teacher Retirement System of Texas.

Section 13. Communications

1. Conference Calls

The Executive Committee, Board of Directors, Standing Committees, Districts and Chapters are able to utilize varying forms of communication in order to conduct meetings. The use of Zoom or other such videoconferencing services to conduct meetings at the Chapter, District, and State levels may be used. It is recommended that the free versions be used, when possible.

2. TRTA Publication

TRTA's primary member publication is *The VOICE*. This publication is produced quarterly (on a calendar-year basis) and content is determined by the TRTA staff with the Executive Director serving as Editor in Chief. Along with pertinent legislative or member information, *The VOICE* also provides such required information as: proposed *TRTA Bylaws* amendments, candidates running for TRTA Officer positions (First Quarter); call for nominations for the E. L. Galyean Service Award, State events report and pictures, professional liability insurance information and enrollment form (Second Quarter); upcoming State events article, Awards Program information and information on Foundation Month (Third Quarter); State events schedule (Fourth Quarter). Announcement of Board of Directors approved Member Benefits Program. Agreements must be published to the membership in *The VOICE* before the company initiates direct promotional contact with any TRTA member. TRTA also has an online communication known as the *Inside Line*, which is distributed as needed to update members on important information.

3. TRTA Photo Disclaimer for State, District, and Chapter Meetings and Events

At public TRTA events, including at the Chapter, District, and State levels, photos may be taken by TRTA staff and/or volunteers. TRTA may use likenesses of its members in photographs, videos, or other digital or social media ("photo") in its publications, including web-based publications, without payment or other consideration. If a TRTA member wishes not to be photographed, recorded or appear in TRTA promotional items, the member should avoid any cameras in the area.

Section 14. Awards

TRTA shall recognize individual members, Chapters, and Districts for commendable service to the organization, the community, or public education. The President shall determine the awards to be made each year. TRTA Awards Program packets (templates) will be emailed in January to District and Chapter Presidents.

1. Anniversary Recognition

At the next State event following notification to TRTA, each affiliated Chapter will be recognized for reaching a fifth-year milestone anniversary beginning with the 25th anniversary.

2. Membership Growth Awards

The District and Chapter with the highest percent membership growth and the District and Chapter with the largest increase in members shall receive awards.

3. President's Diamond Award

The President's Diamond Award may be presented at the TRTA State event during the President's second year in office. Criteria for receiving the award will be determined by the presiding President.

4. E. L. Galyean Service Award

E. L. Galyean served as the first Executive Director of the Texas Retired Teachers Association from 1980–1992. He was named Executive Director Emeritus when he retired in 1992. The consummate educator, Mr. Galyean, with his unassuming manner and through his knowledge, leadership, service and direction, laid the groundwork for the strong, viable organization TRTA has become. This award recognizes a TRTA member for outstanding and unusual service on the State level to the Texas Retired Teachers Association and its members. The award also serves as a constant reminder of the distinctive quality of committed service rendered by Mr. E. L. Galyean to TRTA.

5. Guidelines for the E. L. Galyean Service Award

a. Requirements

A nominee must be or must have been (in case of posthumous consideration) a member of the Texas Retired Teachers Association and a Chapter.

- A nominee must not currently be serving on the TRTA Board of Directors.
- A list of specific years, contributions, and offices held in TRTA—State, District, and Chapter. As this is a State award, the major criterion will be State—level contributions.
- A list of other relevant information, e.g. civic organizations, philanthropic involvement, honors/awards received, etc.
- A recent photo of the nominee (3x5 or larger).
- A copy of the dated District minutes with the motion to nominate the individual for the award.

b. Nomination Process

- The TRTA publication *The VOICE* (second quarter) will publish a call for the E. L. Galyean Service Award nominee annually.
- The E. L. Galyean Service Award application can be download at www.trta.org/awardapplication.
- The District executive board may submit one nomination per year to the State; the nominee may be from that District or another. The nomination may either be one selected from a Chapter recommendation or one selected only from the District board.
- Applications for nomination may be kept on file and reviewed again for up to two years.
- DEADLINE: The TRTA office must receive the nomination by November 1.

c. Selection Process

- Applications for the E. L. Galyean Service Award with any accompanying materials will be sent to the TRTA Second Vice-President from the TRTA office. The TRTA Vice-President will review and confirm the applications, contacting individuals if necessary to get additional or clarifying information. The Vice-President will bring the applications and information to the winter Board of Directors meeting.
- The TRTA Board of Directors will hear from the Vice-President and review the printed materials that have been submitted and vote.
- A maximum of one E. L. Galyean Service Award will be made during any one year. The Board of Directors may choose not to name an award recipient during any year.

d. Presentation of the Award

- A presentation will be done for the recipient of the award.
- In addition, the Board of Directors may approve TRTA's payment of travel expenses for the recipient to the presentation.
- A plaque with the names of all recipients is displayed in the TRTA office.

Section 15. State Fiscal Issues

1. Expenditure of Funds

Funds shall be expended under the supervision of the Board of Directors, within the adopted budget.

2. Annual Audit and TRTA Tax Return

An independent audit of the TRTA financial records shall be conducted annually. The audit shall be performed by a professional auditor selected and approved by the TRTA Board of Directors. The audit shall be presented to the Board of Directors for adoption annually. The TRTA audit, management letter, and other Association financial documents are available upon written request to the Executive Director at the TRTA State office.

The TRTA Executive Committee shall review the association tax returns annually with the preparing CPA.

3. Signatory Authority

The Executive Director is authorized to sign documents relating to the fiscal affairs of the organization. Other persons may be authorized to be a signatory by the Board of Directors.

4. Budget

The TRTA budget shall be adopted by the Board of Directors no later than June 30. The budget may be amended by the Board of Directors as necessary.

5. Disposal of Obsolete and/or Surplus Property

The TRTA Executive Director (or designee) may dispose of real or personal property that is obsolete, damaged and unusable or no longer necessary for the operation of TRTA. Disposal may include trading in the item(s) on its replacement, recycling, selling or throwing away the item(s) if appropriate. Every effort shall be made to determine if a need for the surplus property exists anywhere else in the Association before a sale, trade-in or disposal occurs. TRTA property cannot be given to or taken by any employee for personal use, or disposed of in any manner other than described herein or approved in writing by the Executive Director (or designee).

6. Life Membership Fund

The fund that has been established for life memberships shall be maintained.

Section 16. Purchasing and Acquisition

1. Authorized Purchases

Unless required by specific Board of Directors action, the Executive Director may purchase or authorize purchases of items within the adopted budget. TRTA personnel and Board members shall not purchase supplies or equipment for personal use with Association resources or credit cards or through the Association's State office.

2. Delegation

The Executive Director, or designee, shall evaluate and purchase items not required to be bid.

3. Bids Required

Purchases of tangible items, equipment, or technology services costing \$15,000 or more must be bid and shall require the approval of the Board of Directors.

Consulting relationships of \$15,000 or more shall be bid when the service is new, or upon direction of the TRTA Board of Directors.

4. Specifications

Specifications for all items to be purchased through bids shall be prepared by the Executive Director for evaluation by the Board of Directors.

5. Quotes and RFPs

The TRTA Executive Committee and the Executive Director may conduct a request for proposal (RFP) process for services, equipment, or other items as may be deemed necessary by the TRTA Board of Directors, Executive Committee, or as recommended by the TRTA Executive Director.

Section 17. Investments

1. Policy Statement

It is the policy of Texas Retired Teachers Association that the administration of its funds and the investment of those funds shall be handled as its highest public trust. Investments shall be made in a manner which will provide the maximum security of principal invested through limitations and diversification while meeting the daily cash flow needs of the TRTA and conforming to all applicable law. The receipt of a market rate of return will be secondary to the requirements for safety and liquidity.

2. Scope

This investment policy applies to all the financial assets and funds held by TRTA. It is the policy of TRTA that all funds shall be managed and invested in order of their priority: safety, liquidity, diversification and yield. The suitability of each investment decision shall be determined on these objectives.

3. Objectives and Strategy

Diversification

Diversification of the portfolio will include diversification by maturity and market sector and will include comparison evaluation by the Investment Manager.

Yield

TRTA's investment portfolio shall be designed with the objective of attaining a market rate of return throughout budgetary and economic cycles, taking into account TRTA's risk constraints and the cash flow of the portfolio. "Market rate of return" may be defined as the average yield of the current three-month U.S. Treasury Bill or such other index that most closely matches the average maturity of the portfolio. TRTA shall maintain a comprehensive cash management program which includes collection of accounts receivable, prudent investment of its available cash, disbursement of payments in accordance with invoice terms and the management of banking services.

4. Delegation of Investment Authority

The Investment Manager, acting on behalf of the TRTA Board of Directors, shall be responsible for investment management decisions and activities. The Board of Directors shall be responsible for considering the quality and capability of staff, investment advisors, and consultants involved in investment management and procedures. The Investment Manager or a designated Investment Advisor shall be responsible for all transactions undertaken and shall establish a system of controls to regulate the activities of subordinate officials and staff. No Officer or designee may engage in an investment transaction except as provided under the terms of this policy and the procedures established by the Investment Manager and approved by the TRTA Executive Director.

5. Prudence

The standard of prudence to be used in the investment function shall be the "prudent person" standard and shall be applied in the context of managing the overall portfolio. This standard states, "Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion, and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the expected income to be derived."

6. Limitation of Personal Liability

The Investment Manager and those delegated with investment authority under this policy, when acting in accordance with the written procedures and this policy and in accord with the Prudent Person Rule, shall be relieved of personal responsibility and liability in the management of the portfolio provided that deviations from expectations for a specific security's credit risk or market price change or portfolio shifts are reported in a timely manner and that appropriate action is taken to control adverse market effects.

7. Internal Controls

The Investment Manager shall establish a system of written internal controls which will be reviewed annually with the independent auditor of TRTA. The controls shall be designed to prevent loss of funds due to fraud, employee error, misrepresentation by third parties, unanticipated market changes, or imprudent actions by employees of TRTA.

8. Cash Flow Forecasting

Cash flow forecasting is designed to protect and sustain cash flow requirements of TRTA. Supplemental to the financial and budgetary systems, the Investment Manager will maintain a cash flow forecasting process designed to monitor and forecast cash positions for investment and operations purposes.

9. Authorized Investments

Acceptable investments under this policy shall be limited to the instruments listed below. The investments are to be chosen in a manner which promotes diversity of market sector and maturity. The choice of high-grade government investments and high-grade money market instruments is designed to assure the marketability of those investments should liquidity needs arise.

- Obligations of the United States Government, its agencies and instrumentalities, and government sponsoring enterprises, not to exceed two years to stated maturity;
- Fully insured or collateralized certificates of deposit not to exceed three years to the stated maturity with no more than ten percent of total investments in certificates of deposit with a stated term to maturity greater than one year;
- No-load, AAA-rated, SEC registered money market funds, each approved specifically before use by the TRTA Board of Directors. No more than 80% of the entity's monthly average balance may be invested in money market funds.

10. Competitive Bidding Requirement

All securities, including certificates of deposit, will be purchased or sold after market comparisons are investigated to verify that TRTA is receiving fair market value/price for the investment.

11. Delivery versus Payment

All security transactions, including collateral for repurchase agreements, entered into by TRTA, shall be conducted on a delivery versus payment (DVP) basis.

12. Authorized Financial Dealers and Institutions

All investments made by TRTA will be made through TRTA's banking services bank (trading desk) or a primary dealer approved by the Board of Directors. TRTA shall maintain a list of financial institutions which are authorized to provide investment services. TRTA shall provide a copy of this Investment Policy to each financial institution or dealer with whom it conducts investments, to insure familiarity with the goals and objectives of the investment program. The broker/dealer will be required to return a signed copy of the Certification Form as proof that the policy has been received and reviewed.

13. Diversification and Maturity Limitations

It is the policy of TRTA to diversify its investment portfolio. Invested funds shall be diversified to minimize risk or loss resulting from over-concentration of assets in a specific maturity, specific issuer, or specific class of securities. Diversification strategies shall be established and periodically reviewed. At a minimum, diversification standards by security type and issuer shall be:

- U.S. Treasuries and Securities with the U.S. Govt. guarantee not to exceed 80%
- U.S. Government agencies and instrumentalities not to exceed 80%
- Fully insured or collateralized Certificates of Deposits not to exceed 80%
- Money Market Funds not to exceed 80%
- The Investment Manager shall be required to diversify maturities. The Investment Manager, to the extent possible, will attempt to match investment with anticipated cash flow requirements. Matching maturities with cash flow dates will reduce the need to sell securities prior to maturity, thus reducing market risk. Unless matched to specific requirements, the Investment Manager may not invest in any security with stated maturity greater than two (2) years.

14. Safekeeping and Collateralization

State law and prudent treasury management require that all purchased securities be bought on a delivery versus payment basis and be held in safekeeping by either TRTA, an independent third party financial institution, or TRTA's designated depository. All safekeeping arrangements shall be designated by the Investment Manager and an agreement of the terms executed in writing. The third party custodian shall be required to issue safekeeping receipts to the TRTA.

15. Performance Evaluation and Reporting

The Investment Manager shall submit monthly to the TRTA Executive Director and quarterly and annual reports to the TRTA Board of Directors containing sufficient information to permit an informed outside reader to evaluate the performance of the investment program.

16. Depositories

TRTA will review depository fees and services at least every three years.

17. Investment Policy Adoption by TRTA Board

The policy shall be reviewed on an annual basis by the TRTA Executive Director and TRTA Board of Directors.

Section 18. Reimbursement for Expenses

The TRTA Executive Director shall have the authority to approve payment of reimbursement of travel expenses (including lodging, airline costs, and meal costs) for TRTA employees, officials and officials' spouses or travelling companions who provide support and/or assistance to the official in his/her capacity representing TRTA business. Reimbursement for meal expenses shall be an amount determined by the Board of Directors.

1. Lodging

A TRTA employee, as assigned, shall make lodging reservations for authorized TRTA meetings and events. If a TRTA official or employee fails to cancel a hotel reservation by the guaranteed deadline, reimbursement for the charges shall be reviewed and approved by the Executive Director for extenuating circumstances only.

2. Sales Tax

TRTA is exempt from paying the state sales tax, but is not exempt from paying the Texas Hotel Occupancy Tax and any city taxes.

3. Transportation

Transportation costs shall include actual mileage to and from a member's home. The TRTA Board shall adopt a mileage reimbursement rate annually at the June board meeting to go into effect on July 1. Airline travel shall be reimbursed at the lowest rate possible. There will be no reimbursement for first class travel. These travel expenses will include shuttle, and local taxi service and ride share services (i.e. Uber/Lyft), as well as airport parking. People traveling on TRTA business are encouraged to use hotel/motel shuttles to reduce expenses. Authorized expenditures include payment for airport and hotel parking fees, toll fees, and gratuities. All receipts must be attached to the voucher form submitted for reimbursement.

4. Reimbursements

The TRTA Board shall adopt a reimbursement rate for meal allowances annually at the June board meeting to go into effect on July 1. Reimbursement shall not be made for the following expenses: alcoholic beverages; in-room movies; room service; laundry service; and any expenses associated with traveling with a pet. Reimbursement for Officers or the Executive Director visiting a Chapter shall be paid only for the first such assignment to each Chapter during a fiscal year. Exceptions shall be approved by the President and the Executive Director.

5. Communications Equipment

TRTA shall pay expenses for appropriate communications equipment for the use of the TRTA elected Officers, the Executive Director and the Legislative Coordinator.

Section 19. Record Retention and Destruction Policy

1. Statement of Policy

This policy covers all records and documents, regardless of physical form, contains guidelines for how long certain documents should be kept and how records should be destroyed. The policy is designed to ensure compliance with federal and state laws and regulations, to eliminate accidental or innocent destruction of records and to facilitate the operation of the organization by promoting efficiency and freeing up valuable storage space.

2. Retention Schedule and Administration

The record retention schedule is set forth in Appendix A. The deputy director shall administer the policy. The deputy director is also authorized to: make modifications to the record retention schedule from time to time to ensure that it is in compliance with local, state and federal laws and includes the appropriate document and record categories for the organization; monitor local, state and federal laws affecting record retention; annually review the record retention and disposal program; and monitor compliance with this policy.

3. Electronic Documents and Records

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types in Appendix A will be maintained for the appropriate amount of time. If an employee has sufficient reason to keep an email message, the message should be printed in hard copy and kept in the appropriate file or moved to an “archive” computer file folder.

4. Suspension of Record Disposal in the Event of Litigation or Claims

No director, Officer, employee, volunteer or agent of the Association shall destroy, dispose of, conceal, or alter any record or document while knowing that it is or may be relevant to an anticipated or ongoing investigation or legal proceeding conducted by or before a federal, state or local government agency, including tax and regulatory agencies, law enforcement agencies, and civil and criminal courts, or an anticipated or ongoing internal investigation, audit or review conducted by the Association.

During the occurrence of an anticipated or ongoing investigation or legal proceeding as set forth above, the Administrator shall suspend any further disposal of documents until such time as the Administrator, with the advice of counsel, determines otherwise. The Administrator shall take such steps as necessary to promptly inform all staff of any suspension in the further disposal of documents.

Appendix A – Record Retention Schedule

A. Accounting and Finance

Record Type	Retention Period
Accounts payable ledgers and schedules	7 years
Accounts receivable ledgers and schedules	7 years
Annual audit reports and financial statements	Permanent
Annual audit records, including work papers and other documents that relate to the audit	7 years after completion of audit
Bank statements and canceled checks	7 years
Expense records	7 years
General ledgers	Permanent
Electronic payment records	7 years
Notes receivable ledgers and schedules	7 years
Investment records	7 years after sale of investment

B. Corporate Records

Record Type	Retention Period
Annual reports to Secretary of State/Attorney General	Permanent
Articles of incorporation	Permanent
Bylaws	Permanent
Board meeting and board Committee minutes	Permanent
Board policies/resolutions	Permanent
IRS application for tax-exempt status (Form 1023)	Permanent
IRS determination letter	Permanent
State sales tax exemption letter	Permanent
Contracts (after expiration)	7 years
Licenses and permits	Permanent

C. Employee Documents

Record Type	Retention Period
Benefit plans	Permanent
Employee files	Termination + 7 years
Employment applications, resumes and other forms of job inquiries, ads or notices for job opportunities	3 years
Forms I-9	3 years after hiring, or 1 year after separation
Employment taxes	7 years
Payroll registers (gross and net)	7 years
Time cards/sheets	7 years
Retirement and pension records	Permanent

D. Property Records

Record Type

Lease Agreements
Property Insurance Policies

Retention Period

Permanent
Permanent

E. Tax Records

Record Type

Tax-Exemption Documents and Related Correspondence
IRS 990 and 990T tax returns
Tax Bills, Receipts, Statements
Tax Workpaper Packages-Originals
Sales/Use Tax Records

Retention Period

Permanent
Permanent
7 years
7 years
7 years

Section 20. Whistle Blower Protection Policy

TRTA requires Officers, Board of Directors, Standing Committee Chairs and employees to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As employees and representatives of TRTA, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations.

1. Reporting Responsibility

This whistleblower policy is intended to encourage and enable employees and others to raise serious concerns internally so that TRTA can address and correct inappropriate conduct and actions. It is the responsibility of all Officers, Board of Directors, Standing Committee Chairs, employees, and volunteers to report concerns about violations of the organization's code of ethics or suspected violations of law or regulations that govern the organization's operations.

2. No Retaliation

It is contrary to the values of the organization for anyone to retaliate against any Officer, Board of Directors, employee, or volunteer who in good faith reports an ethics violation, or a suspected violation of law, such as a complaint of discrimination, or suspected fraud, or suspected violation of any regulation governing the operations of the organization. An employee who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment.

3. Reporting Procedure

TRTA has an open-door policy and suggests that employees share their questions, concerns, suggestions, or complaints with their supervisor. If you are not comfortable speaking with your supervisor or you are not satisfied with your supervisor's response, you are encouraged to speak with the Executive Director or a board member. Supervisors are required to report complaints or concerns about suspected ethical and legal violations in writing to the Executive Director, who has the responsibility to investigate all reported complaints. Employees with concerns or complaints may also submit their concerns in writing directly to the Executive Director.

4. Executive Director

The Executive Director is responsible for ensuring that all complaints about unethical or illegal conduct are investigated and resolved. The Executive Director will advise the Board of Directors of all complaints and their resolution and will report at least annually to the Treasurer and the TRTA President on compliance activity relating to accounting or alleged financial improprieties.

5. Accounting and Auditing Matters

The Executive Director shall immediately notify the President and Finance Committee of any concerns or complaint regarding corporate accounting practices, internal controls or auditing and work with the Committee until the matter is resolved.

6. Acting in Good Faith

Anyone filing a written complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

7. Confidentiality

Violations or suspected violations may be submitted on a confidential basis by the complainant. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.

8. Handling of Reported Violations

The Executive Director will notify the person who submitted a complaint and acknowledge receipt of the reported violation or suspected violation. All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation.

Section 21. Employment

The TRTA Board of Directors requires the TRTA Executive Director to have an employee personnel manual on file in the TRTA office. The TRTA Executive Director will work with TRTA legal counsel to maintain the manual and keep it updated with all laws and regulations appropriate to Texas employee rights and responsibilities. TRTA is an equal opportunity employer.

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INSERT DISTRICT & CHAPTER STANDING RULES

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SECTION 3: OFFICERS

Overview

This section contains directories for the following:

- Presidents | 59-78
- First Vice-Presidents/Membership/Volunteer Services/Community Involvement Committee | 79-82
- Second Vice-Presidents/Communications Committee | 83-86
- Secretaries, Treasurers & Finance Committee | 87-98
- Immediate Past Presidents | 99
- Parliamentarians | 100-101

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District and Chapter Presidents

Suggested Activities

The TRTA District Presidents:

1. Preside at District meetings, participate in budget preparation and appoint Committee Chairs and liaisons;
2. Visit Chapters at least once in a two-year term, disseminate TRTA information and report changes in District Officers and Committee Chairs to the State office;
3. Collaborate with Board of Directors and State Committees to increase membership, strengthen Chapters and promote TRTA programs/events; and
4. Follow the monthly calendars in the *TRTA Leadership Manual* and complete other items as assigned to fulfill the objectives of TRTA.

The TRTA Chapter Presidents:

1. Preside at Chapter meetings, inform Chapter membership on a regular basis about TRTA, District and Chapter activities and work to increase membership;
2. Disseminate TRTA information and report changes of Officers or Committee Chairs to the District President and State office;
3. Serve as coordinator of the awards programs for the Chapter and distribute Chapter awards; and
4. Follow the monthly calendars in the *TRTA Leadership Manual* and complete other items as assigned to fulfill the objectives of TRTA.



District Committee Chairs Selection

It is very important that you appoint dependable, hardworking, and enthusiastic Committee Chairs. They will be responsible for communicating with Chapter Chairs and providing assistance when needed to Chapters. They will need to gather information and provide training at the Spring Conference in your District. Chapter Presidents can help provide you with candidates. It is also helpful if the Chairs have email. Membership/Volunteer Services/Community Involvement and Communications Committees are elected positions, not appointed.

Sometimes the Legislative Chair is on the State Legislative Committee. If your Chair is not, your State Legislative Committee member must be able to communicate with your District Chair.

Retirement Education Chair needs to be sure that each of your Chapters are sponsoring a seminar or partnering with another Chapter to sponsor a seminar. This Chair is a resource person for helping the Chapters organize a seminar.

Member Benefits Chair needs to communicate periodically with the Chapter Chair.

The Historian is in charge of collecting information from each Chapter and compiling the District history as well as sending information for the State. This person should be interested in taking pictures at all District meetings.

The Parliamentarian should be knowledgeable with *Robert's Rules of Order Newly Revised* to help you in conducting your meetings.

The Foundation Liaison should communicate with the State office and supply information to the Chapters regarding TRTF initiatives, such as Foundation Month. In addition, the Foundation Liaison should assist with the promotion of the Foundation's charitable programs ("A Helping Hand," the Lehr-Pritchard "A Helping Hand" Endowment Fund, Classroom Assistance Grants, First-Year Teacher Scholarships, Disaster Relief, and TRTF's newest program, The Dr. Kate Bell and E.L. Galyean Assistance Fund).

The Technology Contact should have strong technical knowledge about computers and web development, and will coordinate with the District Officers and Committee Chairs as well as the State to develop content and update the District website.



Suggestions for District Fall Conference

1. Planning and arrangements
 - Reserve meeting place and contact caterer
 - Registration set up, sign-up sheets, name tags
 - Morning refreshments/lunch
 - Assign duties for meeting responsibilities
 - Door prize distribution
2. TRTA Officer
 - Communicate with Officer
 - Provide your cell phone number
 - Send an agenda
 - Inquire if overnight accommodations are needed
 - Provide directions to the meeting place
3. Programs
 - Plan the agenda
 - Decide who prints the programs/agendas
 - Decide amount needed
 - Decide if minutes are to be printed or distributed electronically
 - Decide if proposed budget is to be printed or distributed electronically
 - Entertainment
4. State *TRTA Bylaws*
 - Review District standing rules for compliance with the *TRTA Bylaws*
 - Prepare any proposed changes or updates
5. Other speakers
 - Invite your legislators to give a short presentation
 - Include time for your District foundation liaison
 - Include time for the TRS representative
 - AMBA representative's table set up
 - Credit union or any other vendors table set up
6. Officer election (in fall of odd number years)
 - Ballots
 - Tellers committee
 - Candidates to give speeches
7. Memorial service
 - Who conducts
 - Any materials needed



District Fall Planning Meeting Sample Agenda

1. Welcome/Introductions
2. Minutes from May meeting
3. Proposed budget
4. Responsibilities for Officers and Committee members
 - What do you expect of your Officers and Committee members?
5. Communications
 - Newsletter
 - Telephone Committee
 - Email
 - Web page
6. District President's Chapter Visits (at least once in a two-year term)
 - Dates, time, place – how to designate assignments, sign-up calendar
 - Directions
 - What will be the role of District President at these meetings?
7. Updates from State
 - Membership/Volunteer Services/Community Involvement: membership incentives (\$10.00 from State for each member increase over last year's total); suggestions for increasing membership
 - Legislative Priorities; communicating with your legislators at home
 - State events, delegates election, send copy of delegates to District President
8. District Fall Conference
 - Memorial Service
 - Speaker
 - Legislative representatives
 - TRS representative
 - Foundation liaison
 - Coffee and refreshments
 - Registration, name tags, door prize drawing
 - Election (in fall of odd number years)
 - Audit report
 - State *TRTA Bylaws* updates
 - Meeting place and meal arrangements
 - Budget for conference
 - Gifts for speakers
 - Door prizes
9. Retirement education seminars
10. Future District meeting dates
11. Other announcements/comments



Suggestions for District Spring Conference

1. Planning and arrangements
 - Reserve meeting place (need room for general session and rooms for breakout sessions)
 - Contact caterer
 - Registration set up, sign-up sheets, name tags
 - Table for District Treasurer for receiving registration forms and travel vouchers
 - Signs for the training rooms or tables
 - Distribution of training materials
 - Morning refreshments/lunch
 - Assign duties for meeting responsibilities
 - Door prize distribution
2. TRTA Officer
 - Communicate with Officer prior to conference
 - Provide your cell phone number
 - Send an agenda
 - Inquire if overnight accommodations are needed
 - Provide directions to the meeting place
 - Provide a donation in honor of speaker to TRTF
3. Programs
 - Plan the agenda, including breakout session assignments
 - Decide who prints the programs/agendas
 - Decide amount needed
 - Decide if minutes are to be printed or distributed electronically
 - Decide if Treasurer's report is to be printed or distributed electronically
 - Entertainment
 - Conduct the membership incentive drawing
4. Other speakers
 - Legislators
 - AMBA – table set up
 - Superintendent, mayor
 - Other vendors – table set up
5. Breakout sessions
 - Check with presenters if any equipment is needed, printing of extra handouts, materials, etc.
 - Check with presenters to see if they have their training materials and if they have their presentations prepared
6. Awards ceremony
 - District President conducts
 - Other District Officers/Chairs may have special awards/recognitions
 - Certificates needed
7. Installation of Officers (if applicable)
 - Who conducts
 - Any materials needed



District Spring Planning Meeting Sample Agenda

1. Welcome; introduce any guests
2. Minutes from fall planning meeting (Minutes may be approved prior by a Minutes Committee, sent via email, or copies on table and do not have to be read orally)
3. Treasurer's report
4. Annual reports from District Officers/Chairs, be sure to include:
 - Legislative report
 - Membership/Volunteer Services/Community Involvement report
 - Retirement education seminars report
5. Chapter visits report
6. Chapter Presidents' annual reports
7. Updates from State
 - State events
 - TRTA Officers election and bylaws amendments
 - Awards
8. Spring Conference
 - Speaker
 - Installation of Officers
 - Coffee and refreshments
 - Registration, name tags, door prize drawing
 - Training sessions
 - Be sure every presenter has resource materials
 - Review training sessions schedule
 - Conduct the membership incentive drawing
9. Finances for conference – District Treasurer explains guidelines
10. Conference registration – who is to attend and deadlines for registration forms
11. Meeting place and meal arrangements
12. Gifts for speakers
13. Door prizes
14. Other announcements/comments

District Caucus Meeting before the TRTA House of Delegates



District President Instructions:

Call to order

Roll call of delegates

Amendments: Go over any proposed amendments

Election: Go over the slate of TRTA Officers

Other announcements/comments

Adjournment





Procedures for Election of Officers

The Nominating Chair will present the Nominating Committee's report (slate of Officers). The President conducts the elections as follows:

The Nominating Committee has nominated _____ for the office of _____.

Are there further nominations for the office of _____?

There being no further nominations from the floor, the nomination is declared closed.

(Repeat this for each office).

NOTE: If there are nominations from the floor, a vote either by secret ballot or a show of hands must be taken for that office. If there are no nominations from the floor proceed as below.

If there is no objection, a voice vote will be taken for the entire ticket.

Those in favor of the entire ticket as presented by the Nominating Committee say aye, those opposed say no.

The ayes have it and the members on the ticket submitted by the Nominating Committee are elected Officers of District _____ for the _____ years.



Awards Program

Optional: A summary of the TRTA Awards Program is shown below. All awards are selected at the District and Chapter levels. TRTA Awards Program packets (templates) will be emailed in January to District and Chapter Presidents.

District Awards

Achievement Award

Selected by the District President. Award recognizes District organization and programs; conducted 2 successful meetings with representatives from all Chapters

Golden Apple Award

Selected by the District President. Award recognizes TRTA organizational activities—based on organizing a new Chapter or reactivating one or more Chapters (maximum of 3 awards)

Grand Prix Award

Selected by the District elected Officers or TRTA Board of Directors. Award recognizes exemplary service, projects and/or contributions made in support of or on behalf of a retired teacher association at any level; awarded for total commitment to promoting the progress of education in Texas or supporting the best interest of all retired educators (maximum of 3 awards)

Appreciation Award

Selected by the District President. Award recognizes unusual service at the District level; for service not covered by other awards (maximum of 3 awards)

School Bell Award

Selected by the District President. Award recognizes news media (newspapers, radio and television stations or respective media staff) for portraying a positive viewpoint of education or educators and who have promoted the interest of retired educators in some exceptional way

Chapter Awards

The following awards are selected by the Chapter President:

Recognition Awards—Basic, Banner and Bell Ringer

Award recognizes Chapter organization, programs and achievements (a Chapter should apply for only highest award for which it qualifies)

Outstanding Recognition and Achievement Award

Award recognizes group contributions to its community and achievements of Chapters whose members joined together on one or more projects

Membership Retention Awards—Bronze, Silver and Gold

Award is based on the percentage of retention of last year's membership: Bronze = at least 80% retention, Silver = at least 90% retention, Gold = 100% retention (only 1 award per membership level)

Special Chapter Award

Award recognizes promotion of TRTA membership; awarded on % basis

Silver Star Award

Award recognizes TRTA membership recruitment; awarded to a TRTA member who recruits 5 or more new members

Twenty-First Century Award

Award recognizes outstanding service; awards given according to number of members in Chapter (number of awards based on number of members)

Appreciation Award

Award recognizes unusual service at the Chapter level; for service not covered by other awards

School Bell Award

Award recognizes news media (newspapers, radio and television stations or respective media staff) for portraying a positive viewpoint of education or educators and who have promoted the interest of retired school personnel in some exceptional way

Volunteer Service Award

Award recognizes a member of a Chapter with the highest volunteer service hours in that Chapter (may only submit one nominee)

Above and Beyond the Call of Duty Award

This award recognizes a Chapter member who has gone the extra mile in contributing to the Chapter



Guidelines for Organizing a New Chapter

The TRTA membership and fiscal year begins on July 1 and ends on June 30 of the following year. Chapters may be organized at any time during the year.

The Chapter is considered affiliated on the date the certification is issued. For a new Chapter to be represented at the next House of Delegates, it must be affiliated by the end of February of the year the House of Delegates will be held. The organizer of the Chapter should plan to get their documentation submitted by February 15 to ensure the certification will be issued before the end of February.

The following steps outline the process for organizing a new Chapter:

1. Identify the potential area where the new Chapter will be established.
2. Connect with individuals in the area who can help generate interest in forming a Chapter.
3. Email the District President and the State membership department (membership@trta.org) to announce your intent to organize a new Chapter. The membership department will provide a list of at-large members in the area.
4. Obtain a list of local retirees. Sources may include school superintendents, personnel offices, city school districts, TRTA, and personal contacts.
5. Recruit potential members at campus or ISD meetings, retirement events, media engagements, and through personal communication.
6. Choose a meeting location, date, and time.
7. Promote the meeting through local newspapers, radio, and TV.
 - a. Share information about TRTA and its mission.
 - b. Invite all retired teachers, administrators, and school employees.
8. Designate a temporary Chair (often the meeting organizer) and a temporary Secretary. The temporary Secretary should record the minutes of the meeting.
9. Seek mentors from experienced Chapters; your District President can also be a valuable resource.
10. Download the “Organizing a New Chapter” packet from the TRTA website.
11. Hold the first organizational meeting using the agenda provided (see page 69) and provide name tags and a sign-in sheet.
12. Conduct the second organizational meeting using the suggested agenda (see page 70).
13. Choose your Chapter’s tax reporting option and complete the necessary form.
14. Submit the following items to the TRTA State office (membership@trta.org) (all forms can be found in Member Resources under your Member Profile):
 - a. Certificate of Affiliation Request
 - b. Tax Reporting Option Form
 - c. Chapter Reporting Forms and any necessary dues payments
 - d. Request for start-up funds (1-10 members \$400, 11-15 members \$500, and over 15 members \$600).
 - d 1. Provide the TRTA State office with the Chapter’s bank account information
 - e. Provide a list of the Chapter Officers and Chairs
15. Once certified, the new Chapter President will receive a digital copy of the *TRTA Leadership Manual*.
16. Celebrate your Chapter’s official affiliation with a recognition event.



Suggested Agenda for the First Organizational Meeting

Organizational meeting of the _____

District President:

- Welcome attendees and express appreciation for their interest in forming a Chapter for public education retirees.
- Have everyone introduce themselves by name, place of retirement, and year of retirement.
- Introduce any visitors, such as spouses or TRTA members from other Chapters.

District President, past District President, or a District Officer (suggested comments):

- ♦ TRTA keeps members informed on current legislative issues impacting retirees.
- ♦ It advocates for the protection and improvement of public education retiree benefits.
- ♦ TRTA is a service and action oriented organization, with many projects and volunteer opportunities led through Chapters.
- ♦ Members enjoy fellowship, entertainment, and meaningful programs.

The District President introduces the temporary Chair and the temporary Secretary

Temporary Chair:

- Appoint a Nominating Committee (Chair and two members) to present a slate of Officers at the next meeting. Positions include President, First Vice-President, Second Vice-President, Secretary, and Treasurer.
- Lead a discussion to decide on a Chapter name. Some suggestions include:
 - ♦ _____ Retired Teachers Association
 - ♦ _____ Retired School Personnel Association
 - ♦ _____ Association of Retired School Personnel
 - ♦ _____ County Retired Teachers Association
 - ♦ Other: _____
- Decide on the amount for Chapter dues. (State dues are set by the TRTA House of Delegates.)
- Appoint a Committee to draft proposed standing rules that comply with the *TRTA Bylaws*. The draft will be reviewed at the next meeting.
- Announce the date, time, and location of the next meeting.
- Form a telephone Committee to remind members about the next meeting.
- Adjourn the meeting.



Suggested Agenda for the Second Organizational Meeting

Organizational meeting of the _____

Temporary Chair:

- Welcome attendees and introduce visitors.
- Present the report from the Nominating Committee; request additional nominations from the floor; conduct the election of Officers.
- The District President or another TRTA member installs the newly elected Officers.
- The newly elected President assumes leadership and presides over the remainder of the meeting.
- The newly elected Secretary records the meeting minutes (required for the Certificate of Affiliation Request submission).
- Receive a report from the Committee on proposed standing rules, ensuring compliance with *TRTA Bylaws*.
- The President announces necessary Committees and may provide a sign-up sheet. Suggested Committees include Communications (Second Vice-President), Historian, Legislative, Member Benefits, Membership/Volunteer Services/Community Involvement (First Vice-President), and Retirement Education. Additional committees may be appointed as needed.
- Select an item in the Tax Reporting Option Form (see page 73).
- The Treasurer collects Chapter and State dues.
- Select a bank for the Chapter's financial accounts.
- Set the date, time, and location for the next meeting; discuss options for regular Chapter meetings.
- Begin the application process for the Certificate of Affiliation Request.
- Activate a telephone/email Committee to notify members of the next meeting.
- Adjourn the meeting.

Before the next meeting, the President will appoint all Committee Chairs.

Coordinate a meeting between the Treasurer, Secretary, and a representative from the selected bank to establish the Chapter's bank account.

Schedule a planning session with either the elected Officers (Executive Committee meeting) or both elected Officers and appointed chairs (board meeting) to determine the Chapter's meeting schedule for the year, including dates, times, and locations. Suggested venues include:

- Restaurants (lunch meetings are often well attended)
- Libraries (afternoon meetings with refreshments)
- Saturdays at schools or boardrooms
- Churches (note: some may charge a fee)

At the next meeting, invite the District President to formally present the Certificate of Affiliation.

Take time to celebrate this important milestone in the Chapter's formation.



Certificate of Affiliation Request

Chapters meeting the following requirements shall be issued a Certificate of Affiliation:

- A. Adoption of standing rules not in conflict with the bylaws of TRTA;
- B. A minimum of five (5) regular meetings each year;
- C. All elected Officers and Committee Chairs are members of the Chapter and TRTA;
- D. A minimum of five (5) elected Officers: President, First Vice-President, Second Vice-President, Secretary and Treasurer;
- E. The Chapters shall have a minimum of five (5) committees: Communications, Legislative, Member Benefits, Membership/Volunteer Services/Community Involvement, and Retirement Education. The First Vice-President shall be the Membership/Volunteer Services/Community Involvement Committee Chair and the Second Vice-President shall be the Communications Committee Chair.
- F. Completion of Tax Reporting Option Form (see page 73).

Please use the form below to report that the Chapter meets the requirements for being issued a Certificate of Affiliation. Be sure to show the name of the Chapter EXACTLY as you want it on the Certificate of Affiliation. Additionally, please include the following: (1) Chapter Reporting Forms – New Chapter on which you include current State TRTA members joining the new Chapter and new members to TRTA for whom you include one check covering State dues per member, (2) completed Chapter Officer and Committee Chairs Form, (3) minutes from your organizational meeting(s), and (4) a brief letter from the new Chapter President requesting the start-up funds.

COMPLETE AND MAIL TO:

TRTA Membership Department
313 E. 12th Street, Suite 200
Austin, TX 78701-1957

Please be advised that this Chapter has fulfilled requirements and is entitled to a Certificate of Affiliation.
Issue the Certificate to:

Name of Chapter _____

Located at (city) _____, Texas

Date _____ Chapter President signature _____

Address _____

City _____

State _____ Zip _____



Tax Reporting Options

The Texas Retired Teachers Association (TRTA) is a tax-exempt nonprofit organization under the Internal Revenue Code 501(c)(4). 501(c)(4) organizations, also known as membership organizations, are nonprofits that cannot accept charitable contributions. Districts and Chapters are not considered tax-exempt entities unless they have applied for tax-exempt status of 501(c)(4) membership organizations.

The Internal Revenue Service (IRS) is taking a closer look at nonprofit organizations and their affiliates. The IRS is requiring all nonprofit organizations to file an annual tax return. All Districts and Chapters affiliated with TRTA fall under this requirement.

TRTA now has a procedure in place to include Districts and Chapters under its Employer Identification Number (EIN). TRTA Districts and Chapters are eligible to file their annual membership activity with the TRTA Form 990, Return of Organizations Exempt from Tax, and take part in TRTA's tax-exempt status. All current TRTA Districts and Chapters meet this standard; however, all newly formed Chapters must follow the procedure by doing one of the options listed below.

If you are forming a new TRTA Chapter, you have the following options in order to obtain compliance (see the form on the following page):

1. You can provide your yearly activity information your initial year to the TRTA State office. Your activity will be included in the TRTA annual tax return, and you will not be required to file a return. This is the recommended option.
2. You can apply for a tax exemption letter from the IRS by completing Form 1024, and then file your own annual tax return. Substantial costs are associated with this option. If the IRS approves your tax-exempt status, you will have a "Letter of Determination" from the IRS. If you are a tax-exempt entity, you are required to file the 990N or e-postcard return.
3. If you have a tax exemption letter from the IRS, you can file your own return. Some Districts and Chapters already are filing their own returns and may continue to do so if they wish.

If you select option 1, please complete and return the option form and the tax reporting activity forms, provided on the following pages, by September 1. For the initial year, you will need to submit your bank statement, for the beginning month of your current year, to the TRTA State office on or before September 1.

If you select options 2 or 3, a copy of the return filed with the IRS will need to be provided to TRTA on an annual basis.

Please contact Rosalind Johnson, TRTA Deputy Director, at rosalind@trta.org or 512.476.1622 with any additional questions or concerns.



Tax Reporting Option Form (For New Chapters Only)

TO BE FILED WITH THE TRTA OFFICE ON OR BEFORE SEPTEMBER 1.

District Number _____

Chapter Name and Number _____

The Undersigned _____ (District/Chapter Name) does hereby select the following option in order to comply with the tax exempt status requirements of the Internal Revenue Service.

_____ Option 1: Provide your yearly activity information to the TRTA State office. Your activity will be included in the TRTA annual tax return, and you will not be required to file a return. This is the recommended option.

_____ Option 2: You can apply for a tax exemption letter from the IRS by completing Form 1024, and then file your own annual tax return. Substantial costs to your District/Chapter are associated with this option.

_____ Option 3: If you have a tax exemption letter from the IRS, you can file your own return. Some Districts and Chapters already are filing their own returns and may continue to do so if they wish.

Please provide the approval date (made by Board, Executive Committee or Entire Body) of the option selected above.

Date option selected was approved: _____

President

Treasurer

Date

Date

Mailing and Email Address for District/Chapter

UPON COMPLETION OF THIS FORM, SEND FORM TO:

Mail: Rosalind Johnson, Deputy Director
Texas Retired Teachers Association
313 E. 12th St., Suite 200
Austin, TX 78701
Fax: 1.512.476.1003
Email: accounting@trta.org



Procedure to Dissolve a TRTA Chapter

The dissolution of a TRTA Chapter should occur only after all measures to save the Chapter have been exhausted.



1. When the Chapter begins to realize it is in trouble of continuing to operate as a viable Chapter of TRTA, the District President should be contacted. They will contact the Chapter and schedule a visit with the Chapter members. If all efforts to avoid dissolution cannot resolve the problem, the following steps should be followed:
 - a. A meeting of the membership must be called and a vote taken to dissolve the Chapter. It takes a majority vote of those present to dissolve a Chapter.
 - b. At the same meeting, a vote is taken on how to disburse any funds still available (savings, bank balance, petty cash, and any other type of cash or investment account). The funds must be spent on a TRTA approved program (Children's Book Project, Chapter scholarships, or a donation to one of the Texas Retired Teachers Foundation programs).
 - c. Signed minutes of the final meeting and a letter requesting the dissolution must be forwarded to the TRTA Membership Department which will verify the dissolution based on the minutes.
 - d. Upon the TRTA Membership Department's verification, a notification to the Chapter will be sent confirming the Chapter Treasurer will disburse the funds.
 - e. The members of the dissolved Chapter may transfer to another TRTA Chapter of the member's choice.
 - f. Notify the TRTA Membership Department in writing which Chapter(s) the remaining members will be joining.
 - g. Send proof that all funds have been disbursed as outlined in the minutes to the TRTA Membership Department.
 - h. Complete final Treasurer reports and submit to the TRTA Accounting Department, email accounting@trta.org.
2. The Chapter President will send the Chapter's Certificate of Affiliation, if available, to the TRTA Membership Department.



Chapter Request for a District Change

When a Chapter requests to change Districts, the following must occur:

1. The Chapter membership must vote on the decision to change Districts and the vote must be recorded in the meeting minutes.
2. The Chapter President must notify, in writing (with rationales) accompanied by the minutes, both current and receiving District Presidents.
3. The current and receiving District Presidents present the request to their Executive Committees for a vote.
 - a. District Presidents notify each other of the respective decisions
 - b. District Presidents notify the Chapter President of the decision
4. The receiving District President notifies the District Presidents Council Chair of the decision.
5. The District Presidents Council Chair submits the request to the TRTA Board for approval.
6. The District Presidents Council Chair notifies the current and receiving District Presidents, the Chapter, and the TRTA Membership staff of the Board's action.

Note: For purposes of this procedure, "in writing" can be by email.



Suggested Chapter New Member Orientation Agenda

1. Opening ceremonies (Invocation, pledges to the flags, welcome)
2. Introduction of Chapter Officers, Chairs, and special guests (Plan to not overwhelm the guests with many members and only a few guests)
3. New member self-introduction (When retired, campus, position, interests)
4. Organizational structure overview (Brief—this won't mean much early on)
5. Necessity of legislative activity (Describe simply—their money, their health care)
6. Member benefits (Have printed information available)
7. Local community service (Will your Chapter support their interests?)
8. New member involvement process (How to be or not be involved)
9. Adjournment to social visitations (Should consume most of time)

Tips to remember:

- Be brief in comments.
- Allow time for questions and answers.
- Use visuals to reinforce comments, particularly structure.
- Provide printed information about the discussed items.
- Distribute the Chapter directory or at least the contact information about the Chapter, the District and TRTA.
- Consider distributing a survey asking the new members' comments about what they look for in the Chapter. (It may be important to do this before they know "how we have always done it.")



Suggested Chapter Meeting Agenda

Call to Order

Opening Ceremonies

May include pledges to the United States of America and Texas flags and Thought for the Day

Approval of Minutes

(After corrections, "The minutes are approved." No motion is required). Minutes do not need to be read and may be approved prior by a Minutes Committee, sent via email, or copies on table.

Treasurer's Report

(The Treasurer should report orally or emailed, placed on the table, only 4 items: budget balance, receipts, total expenditures and present balance).

New Business

Program

(May be before the business).

Announcements

Adjournment

(A formal motion is NOT necessary. The presiding Officer may say, "If there is no further business, the meeting is adjourned.")

Note: The program time may need to be adjusted to fit the schedule of the presenter.



General Liability Insurance Certificate for Districts or Chapters

Procedures



The District or Chapter President, or other representative of the District or Chapter, must request a certificate of insurance at least two weeks prior to the scheduled meeting for which a general liability insurance certificate is needed. To request a certificate of insurance, log in to your member profile on the TRTA website. Under the Members Resources tab, select the “Request for Certificate of Insurance” tab and submit your request. Please have the following information ready to enter into the Google Form.

1. Date(s) of the meeting
2. Official full name of the meeting site (ie. First Methodist Church; Arlington Civic Center, etc.);
3. Physical address of the meeting site;
4. Contact information at the meeting site:
 - Name
 - Phone number
 - Email address and fax number
5. Person’s name, if the certificate is to be sent to attention of a specific person; and
6. District number/Chapter name

Upon receipt of this written (email) information, TRTA will request the certificate from the insurance company. The insurance company will send a certificate of insurance directly to the meeting site, as well as to TRTA. The District or Chapter President will receive a copy of the insurance certificate for their files from the TRTA office.

The liability insurance policy and premium payments covering Districts and Chapters shall be reviewed by the TRTA Board of Directors annually and may be modified as needed.

Note: If coverage is needed for a meeting other than an official TRTA District/Chapter meeting such as a dinner or other events, please contact the State office with the details. The insurance company will be contacted to see if the event can be covered and what the cost will be. The cost of any meeting not covered by the master policy will be at the expense of the requesting District/Chapter.



District and Chapter First Vice-Presidents

Suggested Activities

The TRTA District First Vice-Presidents:

1. Preside at District meetings in the absence of, or at the request of, the District President;
2. Serve as District Membership/Volunteer Services/Community Involvement Committee Chair and appoint its members;
3. Distribute TRTA membership information to the Chapters;
4. Assist Chapters in developing membership campaign plans;
5. Monitor and support Chapter membership activities;
6. Work with the District President to determine the awarding of the four \$25 Individual Membership Incentives funded by the TRTA office;
7. Identify district areas where Chapters are needed and assist in their development; and
8. Perform other assigned duties to fulfill the objectives of TRTA.

The TRTA Chapter First Vice-Presidents:

1. Preside at meetings of the Chapter in the absence of, or at the request of, the Chapter President, and act for the President in his or her absence or inability to serve;
2. Serve as Chair or appoint a Chapter member to serve as Chair of the Membership/Volunteer Services/Community Involvement Committee for the Chapter and appoint its members;
3. Develop a plan to involve members to recruit, retain, and regain members;
4. Promote the individual membership incentive as determined by the District leadership;
5. Keep the District Membership/Volunteer Services/Community Involvement Committee Chair informed of membership status and activities;
6. Assist the President;
7. Attend the District Fall Conference, if applicable;
8. Attend the Spring Conference as the incoming First Vice-President, if applicable; and
9. Perform other assigned duties to fulfill the objectives of TRTA.



Membership/Volunteer Services/Community Involvement Committee

The TRTA Membership/Volunteer Services/Community Involvement Committee shall promote the organization of new Chapters and develop plans to encourage membership in Chapters, Districts and in TRTA and promote the identification of community needs and develop programs of community volunteer services. The Committee shall collaborate with other Standing and Special Committees as appropriate to further the mission of TRTA.



Suggested Activities

The TRTA State Membership/Volunteer Services/Community Involvement Committee Chair:

1. Develop with Committee members a membership campaign plan;
2. Introduce the TRTA membership campaign plan to the District Chairs and enlist their cooperation;
3. Work with other TRTA Committee Chairs to coordinate membership campaign activities;
4. Assimilate and gather community service material of interest to members and send it to the District Committee Chairs and place information on the TRTA website; and
5. Write the annual cumulative report of community volunteer hours reported by members.

The TRTA District Membership/Volunteer Services/Community Involvement Committee Chairs:

1. Introduce the TRTA membership campaign plan to the Chapter Chairs and enlist their cooperation;
2. Report the TRTA and District membership growth at the District Fall Conference and the Spring Conference;
3. Stimulate the organization of new Chapters and strengthen weak Chapters; and
4. Disseminate information from the State Membership/Volunteer Services/Community Involvement Committee and TRTA website to the Chapter Chairs.

The TRTA Chapter Membership/Volunteer Services/Community Involvement Committee Chairs:

1. Relate information received from TRTA and District Membership Committee Chairs to Chapter members;
2. Develop a plan to involve members to recruit, retain, and regain members;
3. Report membership progress at each meeting;
4. Work with Retirement Education Committee Chair;
5. Disseminate information from the State and District Membership/Volunteer Services/Community Involvement Committee Chairs and TRTA website;
6. Identify local community's need for volunteers and communicate these opportunities to members;
7. Recognize volunteer work of significant interest to the membership at each meeting;
8. Coordinate with the Communications Chair in publicizing volunteer activities;
9. Keep accurate records of community volunteer hours; and
10. Use the CVS Hours Submit link (trta.org/cvsform) to submit total Chapter CVS hours by March 1. **SUBMIT CHAPTER HOURS ONE TIME ONLY!** If you need assistance or need to correct a total, please contact your District or State Membership/Volunteer Services Chair.



Membership Initiatives

Individual Membership Incentive

In each TRTA District, individual members may have a chance to win one of four \$25 prizes. It is up to the District to determine how to award these prizes.

District and Chapter Membership Awards

Two District and two Chapter membership awards are given based on the District and Chapter membership as of March 1 of each year. One certificate is given recognizing the District and Chapter with the highest percentage of membership gain and the other is given to recognize the District and Chapter with the highest number of members gained. The President of the Districts and Chapters winning the membership awards will receive certificates of recognition, and plaques remain in the TRTA office.

State Incentive Rebate Program

Districts shall receive \$3.00 per member (exclusive of life members) on the membership roll at the close of each membership year on February 28. Chapters shall receive an incentive rebate of \$10 per member increase over the previous year. Allocations and rebates are paid as soon as possible after the end of each fiscal year on June 30.



Membership Drive Basic Guidelines

The Treasurer and First Vice-President/Membership/Volunteer Services/Community Involvement Chair must work together on this task. The basic responsibility for the Membership Chair and Membership Committee is to **RETAIN** current members, **REGAIN** former members and to **RECRUIT** new members. The basic responsibility of the Treasurer is to receive and deposit dues, and send membership dues to TRTA office in a timely manner. Although these are the basic duties of each position, there are times when an overlap of duties does occur, making a close working partnership essential.

January–February

Chapters begin planning a membership campaign to implement for the upcoming membership year. The campaign plan should include attainable goals, activities set to attain goals, and ways to measure the results and should include methods of contacting the at-large members. The goals and activities will focus on **RETAINING** current members, **REGAINING** former members who have dropped out of TRTA and the Chapter, and **RECRUITING** new members. The state membership brochure will be reviewed and revised, if necessary.

March

Chapters implement their membership campaign plans. The TRTA membership report (a computer printout of all TRTA annual members in the Chapter) is sent to the Treasurer and Membership Chair via email. The Treasurer and First Vice-President will begin ongoing review of membership data for contact information corrections/changes and make those updates within TRTAPortal. Begin submitting membership report via USPS mail or TRTAPortal and continue to do so regularly.

March 1

TRTA Chapter Membership drive begins.

July–August

Chapter membership list should be compiled.

September–December

State office sends renewal notices. Chapters are encouraged to continue to contact members and former members who have not renewed.

January–February

Membership dues arriving at the TRTA office **before** March 1st will be credited to the current membership year, unless otherwise noted by the Treasurer. Membership dues arriving **after** March 1st will be credited on the subsequent membership year. This is done because the last day of February is the cutoff date for determining the following:

1. Number of delegates for the House of Delegates.
2. Final membership totals used to determine District and Chapter awards for the highest number and highest percentage increase.
3. Final number for the “State Incentive Rebate Program” (if applicable)



District and Chapter Second Vice-Presidents Suggested Activities

The TRTA District Second Vice-Presidents:

1. Preside at District meetings in the absence of, or at the request of, the District President and First Vice-President;
2. Serve as Chair of the District Communications Committee and appoint its members;
3. Serve as District Children's Book Project coordinator;
4. Distribute TRTA communications materials to Chapters;
5. Promote or work with the technology contact to maintain District webpage, newsletters and social media, for example Facebook, Instagram and Twitter, etc; and
6. Perform other assigned duties to fulfill the objectives of TRTA.

The TRTA Chapter Second Vice-Presidents:

1. Preside at Chapter meetings in the absence of, or at the request of, the Chapter President and the First Vice-President;
2. Serve as Chair of the Communications Committee for the Chapter and appoint its members;
3. Promote the Children's Book Project and serve as coordinator or work with the assigned Children's Book Project coordinator;
4. Promote Chapter public communications and publicity;
5. Respond to contact from the District Second Vice-President;
6. Promote or work with the technology contact to maintain Chapter webpage, newsletters and social media, for example Facebook, Instagram and Twitter, etc; and
7. Perform other assigned duties to fulfill the objectives of TRTA.



Communications Committee



The TRTA Communications Committee shall promote and publicize TRTA State, District and Chapter activities to the general public, all active and retired educational employees and elected officials. The Committee shall promote the use of District and Chapter web pages, newsletters, social media and coordinate the Children's Book Project. The Committee shall publicize Chapters recognizing fifty years of formation. The Committee shall collaborate with other Standing and Special Committees as appropriate to further the mission of TRTA. Stay connected with your fellow retirees every day!

Suggested Activities

The TRTA State Communications Committee Chair:

1. Collect and disseminate information on a regular basis;
2. Coordinate a minimum of two meetings per year with District Second Vice-Presidents;
3. Coordinate the Children's Book Project;
4. Promote or work with the technology contact to maintain District and Chapter webpages, newsletters and social media, for example Facebook, Instagram and Twitter, etc; and
5. Work with TRTA staff to prepare sample news releases for Districts to use for their District Fall Conferences and/or Spring Conferences

The TRTA District Communications Committee Chairs:

1. Share information received from the TRTA Communications Committee with the Chapter Communications Committee Chairs;
2. Prepare press releases covering District and TRTA events;
3. Promote or work with the technology contact to maintain District and Chapter webpages, newsletters and social media, for example Facebook, Instagram and Twitter, etc; and
4. Promote and monitor the Children's Book Project report online. Remind the Chapters to report online by February 15. District Chair will verify all reports by March 1.

The TRTA Chapter Communications Committee Chairs:

1. Publicize TRTA State, District, and Chapter activities and projects to the general public, all active and retired school employees, and elected officials;
2. Promote TRTA and its accomplishments in the local community;
3. Promote effective media coverage of meetings and activities;
4. Establish working relationships with the local press and media through personal visits and/or contacts;
5. Coordinate the publication of timely newsletters and promote or work with the technology contact to maintain Chapter webpage, newsletters and social media, for example Facebook, Instagram and Twitter, etc;
6. Promote the TRTA website including the *Inside Line*; and
7. Promote, coordinate and/or work with the Children's Book Project Chair. Submit Chapter count online by February 15.



Children's Book Project Guidelines

The Children's Book Project (CBP) is a service activity initiated by Chapters of TRTA. The purpose is to put books into the hands of children. The guidelines for the Children's Book Project involve using donations, money from fundraising efforts, or contributions to encourage reading.

As Second Vice-President, you will be responsible to make an official decision as to how the book project will be implemented. The President, Second Vice-President, the Project Chair (if there is one) and CBP committee members should be promoters of this endeavor.

Steps for Implementing the Children's Book Project

1. Determine the group(s) of children who are to be targeted which might include schools, shelters, or Head Start program. Books may also be given to children who visit community clinics, receive toys from toy drives or food from food banks, or who are in juvenile justice centers, etc
2. Contact the appropriate person to request permission and obtain a list of approved books for distribution. Determine the delivery date.
3. Obtain books. (See Below)
4. Order book plates for the number of books collected for the project from the TRTA office to be placed inside the books. Email info@trta.org with your name, address, chapter and quantity. Book plates come in a pack of 250.
5. Place book plates in the books noting the Chapter.
6. Present books personally to the group of students or entity.
7. Publicize efforts with photos and information to local media. **No images of children's faces allowed.**

Suggestions on How to Obtain the Books

The books might be donated to the Chapter by community or student service organizations such as Lions Club or Girl Scouts of America, for distribution by the Chapter. Also, the Chapter might purchase books from free or discount sources with funds raised or contributed. Examples include Scholastic Books (www.scholastic.com/bookfairs), Half-Price Books and online sites at www.rif.org, www.wilbooks.com/freebooks, www.literacyempowerment.org, www.bookcloseouts.com, and www.kidsurplus.com. Even dollar stores have appropriate books for some groups of children. You may also apply for a Thrivent Financial grant if you are a policy holder with the company (www.thrivent.com or call 1.800.847.4836).

Chapter Second Vice-President Reporting Book Total Online

Report the actual number of distributed books online by February 15. Report the actual number of books distributed during the period of January 1 through December 31 of the previous year. Cash donations that have been collected for the Children's Book Project must be used **ONLY** for purchasing books that are distributed to children.

District Second Vice-President Monitoring and Finalizing Book Total Online

The District Second Vice-President will monitor the Chapter book totals and finalize the District book total online by March 1.

Publicize the Children's Book Project on the TRTA Facebook Page

Send images and information to info@trta.org for inclusion in the CBP album on the TRTA Facebook page. When submitting images, please include the following: Chapter name, number of books distributed, who received the books, why were the recipients of the books selected, grade or ages of the recipients. **No images of children's faces allowed.**

Visit trta.org/about-trta/standing-committees/communications-committee to view resources to assist you in the role as a Chapter Second Vice-President/Communication Committee Chair.



Style Guide



Any written communication from the Chapter or District level is a reflection of TRTA as an entire organization. In order to promote consistency and minimize controversy, the following guidelines are to be used when preparing printed materials on behalf of TRTA, the District or the Chapter.

TRTA authorizes its affiliated Chapters and Districts to utilize its official logo (or any likeness thereof) only as described in this style in the *TRTA Leadership Manual* and for merchandise or promotional materials that will be used only by and within the respective Chapter or District and strictly prohibits its use by third parties or for political messaging or commercial purposes, unless expressly approved in writing in advance by TRTA. A Chapter or District may charge its members for such merchandise or promotional materials in an amount to recover the cost to produce such items.

1. All public relations efforts must reflect:
The TRTA Communications Committee shall promote and publicize TRTA State, District and Chapter activities to the general public, all active and retired educational employees and elected officials. The Committee shall promote the use of District and Chapter web pages, newsletters, social media and coordinate the Children's Book Project. The Committee shall publicize Chapters recognizing fifty years of formation. The Committee shall collaborate with other Standing and Special Committees as appropriate to further the mission of TRTA.
2. TRTA Mission Statement:
"The Texas Retired Teachers Association advocates improved benefits for all public education retirees and promotes the well-being of its members."
3. Avoid topics such as:
 - A. Political opinions or endorsements
 - B. Religious points of view
 - C. Any topic, wording or references that might be interpreted as discriminatory or inflammatory
4. When preparing printed materials (such as directories and newsletters):
 - A. Consistently use the TRTA Logo. To request the TRTA Logo, email info@trta.org.
 - B. Consistently use the tagline, "TRTA: The Voice for All Public Education Retirees."
 - C. Clearly identify the level of TRTA that is producing the document: State, District or Chapter.
5. For letters and written correspondence, follow these suggestions when feasible:
 - A. Font should be clear, uncluttered and easy to read (no smaller than 10 pt). Suggestions include Calibri and Times New Roman.
 - B. Business letters should be left alignment, single-spaced and professional in appearance.
6. TRTA colors are red, white, and blue.
7. When using visuals for public relations efforts, reflect the diversity of the membership.



TRTA Logo (Vertical)

For use at State, District
and Chapter levels



TRTA Logo (Horizontal)

For use at State, District
and Chapter levels



TRTA Seal

For use at State level



District and Chapter Secretaries

Suggested Activities

The TRTA District Secretaries:

1. Record, or cause to be recorded, the proceedings of District meetings; and
2. Perform other assigned duties to fulfill the objectives of TRTA.

The TRTA Chapter Secretaries:

1. Record, or cause to be recorded, the proceedings of Chapter meetings; and
2. Perform other assigned duties to fulfill the objectives of TRTA.

Secretary Tips:

1. Minutes are a source of future reference. They are the record of reports, proposals and decisions of members in an organization.
2. The Secretary is responsible for recording the proceedings of regular or special meetings.
3. If meetings are three months or more apart, use a Minutes Approval Committee.

Content and Organization of Minutes

1. Be accurate; it is important to proofread.
2. Keep copies of *TRTA Bylaws* for reference.
3. Give name of Chapter, type of meeting, place of meeting and date.
4. Indicate who presided.
5. Record whether minutes were approved and/or any corrections.
6. Record all motions and resolutions; give name of initiating member; state whether adopted or rejected.
7. List paragraphs under headings such as "Unfinished Business," etc.

Committee Reports

1. Record name of Committee reporting.
2. State name of member reporting.
3. Summarize briefly the content of the report.
4. Record any action taken; or
5. Attach a copy of the report to the minutes instead.

Programs

1. Record the type of presentation, such as "Book Review," "Music," "Health Care."
2. Give the name of the speaker.

DO NOT INCLUDE:

1. Defamatory or derogatory statements.
2. Personal comments by Secretary.
3. Adverse criticism.

Remember! Minutes must be signed.



Minutes and Robert's Rules of Order



Roberts Rules of Order Newly Revised, 12th Edition is the official parliamentary authority as stated in the *TRTA Bylaws* and should be the Parliamentary guide for all Chapters.



Minutes are addressed in Section 48 in the book. 48.2 states "Minutes contain a record of what was done at the meeting, NOT what was said by the members."

Minutes should contain:

- a. A statement containing the name of the organization, the time the meeting was called to order, and the kind of meeting (regular, special, executive).
- b. A statement that the Minutes of the previous meeting were either read, printed, or distributed to all members in advance and are approved as corrected or without corrections.
- c. A statement that the Treasurer's Report was distributed as printed and will be filed for audit.
- d. All main motions (including those recommended by a Committee) with the name of the maker of the motion. The person who seconded is not required.
- e. Whether they were debated or amended including the amendment and if the amendment passed (NOT the actual debate itself).
- f. Disposition of the motion (passed or failed)
- g. A list of Committees who gave a report. The reports themselves can be attached to the minutes if desired but are not included in the minutes themselves UNLESS the Committee makes a recommendation in the form of a motion. The motion from a Committee does not require a second. The disposition of the motion is stated. (passed or failed).

For example:

The following Committee reports were received and placed on file.

OR

The Program Committee Chair, Jane Doe, moved that the speaker of today's program be paid a \$25.00 gratuity. There was no discussion and the motion passed.

- h. The speaker's name and topic can be listed but NOT summarized. RONR* 48.6
- i. The signature of the Secretary. The term Respectfully Submitted is no longer used. Thank you, compliments, recognitions, etc. are not part of the minutes UNLESS a motion was made. **For example:** Joe Doe moved that Jim Jones be nominated for the E. L. Galyean Service Award.

**Robert's Rules of Order Newly Revised, 12th Edition+9*



District and Chapter Treasurers

Suggested Activities

The TRTA District Treasurers:

1. Perform administrative tasks, such as collecting annual District dues (if required) and other payments, signing or co-signing District checks, and authorizing expense vouchers according to the budget;
2. Assemble materials for the annual audit;
3. Complete and submit TRTA tax reporting activity forms (TR-1 and TR-2) by August 1;
4. Develop the District budget with participation of the District President and Finance/Budget Committee;
5. Complete and submit an annual mandatory bonding of a District by August 1;
6. Prepare financial reports for meetings of the District Executive Committee, the District Fall Conference and/or Spring Conference;
7. Prepare and submit to the TRTA State office the Chapter Registration, Travel Voucher, and Reimbursement for Conference forms for the Fall and/or Spring Conference;
8. Submit to the State Secretary/Treasurer the scholarship/grant reporting form;
9. Complete Operations Emergency Plan and report completion status to State Secretary/Treasurer; and
10. Perform other assigned duties to fulfill the objectives of TRTA.

The TRTA Chapter Treasurers:

1. Responsible for TRTAPortal submissions to the TRTA office. Collect and record the receipt of dues, and forward all membership dues to TRTA monthly by either TRTAPortal or by mailing a monthly report along with Chapter check (postmarked by the last day of each month), or appoint a Chapter member to complete these duties. Send dues to the District (if required);
2. Assemble materials for the annual audit;
3. Complete and submit TRTA tax reporting activity forms (TR-1 and TR-2) by August 1;
4. Develop the Chapter budget;
5. Complete and submit an annual mandatory bonding of a Chapter by August 1;
6. Pay all bills, as approved in the budget;
7. Keep an accurate record of the Chapter's financial transactions;
8. Prepare financial reports for regular meetings of the Chapter;
9. Provide current membership data to President and Membership/Volunteer Services/Community Involvement Chair (First Vice-President) regularly;
10. Submit to the District Treasurer the scholarship/grant reporting form;
11. Complete Operations Emergency Plan and report completion status to District Treasurer; and
12. Perform other assigned duties to fulfill the objectives of TRTA.



Managing District Finances

As District President, it is important that you have a close working relationship with your District Treasurer. You need to correspond with the Treasurer regarding the expectation that you have for the handling of District finances.

1. Insist that the Treasurer's books be audited prior to July 1.
2. Work with your Finance Committee or Executive Committee and the Treasurer to prepare a budget. This budget needs to be approved by your Executive Committee and submitted to the District membership at your District Fall Conference.
3. Remind the Treasurer that there should be a paper trail for all expenses that are recompensed.
4. Rebated funds to the District will be sent in check form. Never cash these checks, but rather, deposit them in the District's account to preserve the paper trail. Some Districts have a presentation at their District Fall Conference to present the check to the Treasurer.
5. Never ask the Treasurer to write a check unless it has been approved through the budget or by a recorded budget amendment (Secretary minutes). If an emergency arises, you may hold an Executive meeting via teleconference.
6. After the District Fall Conference, any amendments to the budget must be approved by your Executive Committee and then approved by your District membership at the Spring Conference.
7. Take advantage of bonding offered by TRTA (requires two signatures on checks and someone that is not a check signer checking the reconciliation of bank statements, and an annual audit).
8. As President, you do not ask the membership to approve the Treasurer's report. This is approved by the audit, which is approved by the membership. Following the Treasurer's report, you ask for questions, get answers for any asked, and then note that this report will be filed for audit. This does require a motion.
9. Make sure your District Officers and Committee Chairs are aware of the method for reporting expenses (form, receipts or combination of both).
10. Your District funds from the State office are generated by the membership of your District (\$3 per active member, except for life or out-of-state members). TRTA is a non-profit organization.

Mandatory Bonding of a District or Chapter

TRTA provides bonding for District and Chapter Boards at no cost to the District or Chapter. The full premium is paid by TRTA. Six (6) members of each District and Chapter are covered by the policy. The bond covers the position, not the individual; if there is a change of Officers, the new Officers are covered. The bond covers losses up to \$10,000 with a \$250 deductible. Participation is mandatory.





District Budget (sample)

(District Name) (Year)

Funds Available: Start up from previous year, TRTA reimbursement, other income revenue

Total Income _____

President

Travel to Chapters _____
 State Event _____
 Postage/printing _____
 Miscellaneous _____

Total _____

Executive Committee Meetings

Fall (Year) _____
 Travel, Meals, Rent _____
 Spring (Year) _____
 Travel, Meals, Rent _____

Total _____

Total _____

Officers (State Event)

District Committee Chairs (Amounts may vary per committee)

_____ X \$ _____ Total _____

District Fall Conference

Meals (include guests), Rent, Travel for members _____
 Memorial Service _____
 Speaker/Entertainment _____

Total _____

Spring Conference (Travel is funded by TRTA for one conference per fiscal year, \$100 per Chapter)

Miscellaneous _____
 Rent _____
 Meals, Travel (TRTA Funded) _____

Total _____

Membership Recruitment for Chapters

Total _____

Finance Committee

Travel, Meals Total _____

Nominating Committee

Travel, Meals Total _____

Electronic Services (Zoom, etc.)

Total _____

Total Budget _____

Balance Agreement _____



Chapter Budget (sample)

(Chapter Name) (Year)

Funds Available: Start up from previous year, Chapter dues (members X due amount), AMBA ad for yearbook, TRTA membership incentive money, etc.

	Total Income	_____
Officers:		
President		
Postage/printing		_____
Awards		_____
Phone		_____
	Total	_____
First Vice-President		
Membership recruitment/brochure/postage		_____
Printing		_____
	Total	_____
Second Vice-President		
Printing		_____
Speakers at meetings		_____
Thank you notes/postage		_____
Book Project		_____
	Total	_____
Secretary		
Paper/printing/postage		_____
	Total	_____
Treasurer		
Paper/printing/postage		_____
Banking supplies		_____
District dues		_____
	Total	_____
Committee Chairs (Amounts may vary per Committee)		
_____ X \$ _____	Total	_____
Historian		_____
Parliamentarian		_____
Retirement Education Event		_____
Scholarship Fund		_____
Memorials		_____
Courtesy Fund		_____
Newsletter		_____
Yearbooks/Directories		_____
State events expenses (# of delegates X \$ _____)		_____
Door prizes for two District meetings		_____
Miscellaneous		_____
Electronic Services (Zoom, etc.)		_____
	Total Expenses	_____



Preparing for an Internal Audit (suggested)



When preparing for an audit, the following records and documents should be available for review and inspection by the Audit Committee:

General

- *TRTA Bylaws* and District/Chapter Standing Rules (if needed to support your Audit)
- Treasurer Reports
- Bank Statements and reconciliations for accounts
- Voided checks (accounting for sequencing of checks)
- Reimbursement forms with supporting documentation (receipts)
- Minutes (if needed to support budget changes)
- Any other information that the Audit Committee would find useful
- Answer questions

Upon completion of the Audit:

The Audit Chair shall prepare a statement of the findings and any recommendations. This statement is signed by the Committee members and the Treasurer. The Audit Chair would present the report at the next regular scheduled membership meeting. The Audit Report is attached to the minutes of the meeting and copies are filed in both the Treasurer's and the President's files.

How long should you keep records?

Two Years

- Completed reimbursement for reference
- Correspondence

Seven Years

- Check registers/cleared checks/or duplicate checks
- Bank statements/Reconciliations/Deposit slips
- Audit reports

Permanent

- Ledger if your District keeps one



Finance Committee

The TRTA Finance Committee shall collaborate in the preparation of the annual budget, review financial statements as presented, review TRTA banking procedures, explore additional program to facilitate financial services to the membership, and review policies for the investment of funds. The Committee shall collaborate with other Standing and Special Committees as appropriate to further the mission of TRTA.

Suggested Activities

The TRTA State Finance Committee Chair:

1. Serve as TRTA Finance Committee Chair;
2. Collaborate with the TRTA Finance Committee and the TRTA staff in the preparation of a budget to be considered for adoption by the Board of Directors for the ensuing fiscal year;
3. Sign a nondisclosure agreement annually; and
4. Collaborate with the TRTA staff to investigate possibilities for investing TRTA funds.



Membership Reminders and Procedures

Reminders

- TRTA fiscal year is July 1 to June 30.
- Membership drive begins in March prior to the upcoming year.
- Membership drive concludes on the last day of February of the current year. Members can pay State dues annually or monthly using payroll deduction. Additional payment options may be available through our member benefits partner, AMBA.

TRTA Membership Year

Memberships received after March 1 are credited to the subsequent membership year, unless otherwise noted by the Treasurer. The TRTA membership and fiscal year begins on July 1 and ends on June 30 of the following year. The membership drive begins on March 1 and continues to the last day of February the following year. Chapter Treasurers can submit dues for the new membership year to the TRTA Membership Department as early as March 15th, and should submit as soon as possible after dues are collected from the members. Dues should be submitted monthly. **At no time should a member's dues be held more than a month before being submitted by the Chapter.**

Membership Procedures

The Membership Committee Chair and the Chapter Treasurer work together to plan for recruiting and managing Chapter memberships. Procedures for accomplishing this important task are the responsibility of the Chapter. This partnership always results in successful membership management.

Membership in Multiple Chapters

Members may join more than one Chapter; however, only one Chapter may be credited with TRTA membership at the State level. Thus, the member needs to notify the TRTA Membership Department as to which Chapter should receive credit for their TRTA membership for delegate allotment and holding Office/Committee Chairs positions. Such notification must be in writing from the TRTA member.

Membership Payment Options

1. Annual one-time payment of \$35.00 by check, credit card, money order, or bank draft.
2. Annual recurring payment of \$35.00 by credit card or bank draft.
3. Monthly Payroll Deduction—Available to TRS annuitants. Dues paid in monthly installments of \$2.92 withheld by Teacher Retirement System of Texas (TRS) and paid to TRTA. Option not available to annuitant beneficiaries.



Membership Reporting Master Key

Payment Options

Members have 3 options to pay their State membership dues:

1. Annual Payment—Available to members. One-time payment of \$35.00 by check, credit card, money order, or recurring payment by annual bank draft or credit card.
2. Monthly Payroll Deduction—Available to TRS annuitants. Dues paid in monthly installments of \$2.92 withheld by Teacher Retirement System of Texas (TRS) and paid to TRTA. Option not available to annuitant beneficiaries. The Membership Enrollment form/TRS 593 can be found on the TRTA website here: www.trta.org/trs593. Both forms should be sent to the TRTA Membership Department who will then deliver the TRS forms to TRS.
3. A membership may be paid annually or by monthly installments through TRTA's approved benefit partner, AMBA, and their payment collection system. The TRTA Board of Directors and AMBA will work together on these options for TRTA members.

Use the following key to determine the membership type of an individual.

TRTA Member Type Key

- NM stands for Non Member. These are members that have been added to the database with no payment, or members whose membership has been expired for more than 3 years.
- LM stands for Life Member. These members paid a one-time fee, and their membership will never expire. We no longer offer this type of membership.
- M stands for Member. These are members who pay annually. Members will fall into one of these categories:
 - ☉ Blank Category = Annual Member, will need to renew every year
 - ☉ AMBA Category = Member is signed up on an automatic yearly payment by card through AMBA
 - ☉ BD Category = Member is signed up on an automatic yearly payment by bank draft through TRTA
 - ☉ CC Category = Member is signed up on an automatic yearly payment by card through TRTA
- CM stands for Continuous Monthly. These are members who pay monthly. CMs will fall into one of these categories:
 - ☉ TRS Category = Member is signed up on an automatic monthly payment by TRS Annuity through TRS. Their paid-through date will be updated each month after their monthly payment has been processed.
 - ☉ AMBA Category = Member is signed up on automatic monthly payment by card through AMBA. Their paid-through date will be updated each month after the monthly payment has been processed.



Membership Report Submission

Chapters are encouraged to submit their first membership report to the TRTA Membership Department no later than June 1. Dues can be submitted as early as March 15 using Chapter Portal. Subsequent reports should be sent regularly. For each report by mail, send one (1) check payable to the Texas Retired Teachers Association. Do not send individual members' checks. Reports should be mailed to:

Texas Retired Teachers Association (TRTA), Attn: Membership Department
313 E. 12th Street, Suite 200, Austin, TX 78701

All other reports should be emailed to membership@trta.org. This includes members joining from at-large (when no dues are collected) and deceased members.

Managing TRTA Dues

TRTA dues may be paid annually (one-time \$35.00 payment) or monthly (\$2.92 per month). The monthly payment method has various options available.

Annual payment methods:

1. Renewing Members
 - a. Collect \$35.00 plus Chapter dues and place a (check mark) in the (box) on the line corresponding with the members information on the Chapter membership report.
2. New Members
 - a. Collect \$35.00 plus Chapter dues and complete the New Member form by listing the names and addresses. The New Member form will be submitted with the Chapter membership report.

Monthly payment methods:

1. Payroll Deduction Members
 - a. Members, both renewing and new, have the option to have their TRTA membership dues withheld in a monthly amount of \$2.92 from their TRS annuity. The Treasurer and Membership Chair are responsible to make available the TRS Association Dues Payroll Deduction Authorization (TRS 593 form) to interested members. Collect the forms and mail to the [TRTA office](#).
 - b. The Current Monthly form should be completed by listing all members' names and addresses. This form should be submitted along with the completed TRS 593 forms.
 - c. TRTA Membership Department will enter the necessary data and forward the TRS 593 form to TRS. TRS will send a letter to the member and notify him/her that the monthly payment of \$2.92 will be deducted from his/her annuity check.
 - d. The option is not available to annuitant beneficiaries.
2. Life Members
 - a. A paid Life membership allows that person to remain a TRTA Life member regardless of whether or not they remain a member of a Chapter. Do not collect TRTA dues and do not mail the computer printout of Life members to the TRTA office unless you are reporting address changes, deceased members, or no longer members of your Chapter.



District and Chapter Immediate Past Presidents

Suggested Activities

The TRTA District Immediate Past Presidents:

1. Serve as Chair of the Nominating Committee;
2. Serve as advisor to the President and the Executive Committee; and
3. Perform other duties as assigned by the President and/or the Executive Committee.

The TRTA Chapter Immediate Past Presidents:

1. Serve as the Chapter Nominating Committee Chair;
2. Work with the Nominating Committee to identify prospective Officers;
3. Obtain prospective Officer's permission to be nominated;
4. Present the slate of Officers; and
5. Serve as advisor to the President and the Executive Committee.



Parliamentary Pointers



ELECTIONS

If there is only one nomination, the election may be done by acclamation: “Hearing no other nominations, _____ is elected!” A motion “to close nominations” is never required. Once nominations have ceased, a vote to close nominations would be a waste of the Assembly’s time. Just remain silent and proceed with the election.

ADJOURNMENT

A formal motion is NOT necessary. The presiding Officer may say, “If there is no further business, the meeting is adjourned.”

CHAIR

Refers to person presiding or the place from which that person is presiding.

MAJORITY VOTE

More than half of the votes cast. (Abstentions do not count). If there are more votes in favor than against, you have a majority vote.

MINUTES

A formal motion is not necessary to approve the minutes. Say “The Secretary will read the minutes of the _____ (date) meeting.” If the minutes have been sent electronically or distributed in printed form, it is not necessary to read them. Say “A draft of the minutes of the _____ (date) meeting has been distributed.” Minutes and corrections to the minutes may be approved by unanimous consent. Say “Are there any corrections?” With each correction, say “If there is no objection, the correction will be made.” Pause. “Are there any further corrections?” Pause. “Hearing none, the minutes are approved (or approved as corrected).”

UNFINISHED BUSINESS

Unfinished Business is any item that was not completed at the previous meeting or that was postponed to the present meeting. Otherwise, there is no Unfinished Business. Never ask if there is Unfinished Business, as the chair and the Secretary should know beforehand (check the minutes). Simply announce the items and take them up. The term “Old Business” is confusing and should be avoided, since it refers to everything that was done in the past.

PREVIOUS QUESTION or CALL FOR THE QUESTION

This motion, if seconded and adopted by 2/3 vote, stops debate and causes an immediate vote on the pending motion.

RESPECTFULLY SUBMITTED

Is no longer used. Person reporting should just sign their name to the report.

SAME SIGN/VOTING

When the Chair takes the vote, do NOT use “Same Sign.” Instead say “Those in favor say ‘aye.’ Those opposed, say ‘no.’” (Same sign is ambiguous and confuses those wishing to answer in the negative).

SAY “I MOVE THAT”

Never say, “I so move.” State the entire motion so Assembly will know what the question is. Have maker write down the motion, particularly if it is a long or complicated one, and hand it to the Chair.

TABLE

The motion to “Lay on the Table” should only be used for a matter of urgency. Example: If an unexpected VIP enters the hall but there is already a motion pending, say “Is there any objection to laying the pending motion On the Table in order to hear from VIP?” Once the urgency has been handled, say “Is there any objection to Take from the Table the motion that was pending earlier?”



TREASURER’S REPORT

“You have heard the Treasurer’s Report. Are there questions?” Pause “The Treasurer’s Report will be filed for audit.” (No motion... Will be approved when Audit report is approved.)

[illegible]

SECTION 4: COMMITTEE CHAIRS

Overview

This section contains directories for the following:

- Communications (See Officers–Second Vice-Presidents/Communications) | 83-86
- Finance Committee (See Officers–Secretaries, Treasurers & Finance Committee) | 87-98
- Historians | 105
- Legislative Committee | 106-107
- Member Benefits Committee | 108-109
- Membership/Volunteer Services/Community Involvement Committee (See Officers–First Vice-Presidents/
Membership/Volunteer Services/Community Involvement Committee) | 79-82
- Organizational Affairs Committee | 110
- Program Committee | 111-113
- Retirement Education Committee | 114-116
- Standing Rules Committee | 117
- Technology Contact | 118
- Texas Retired Teachers Foundation (TRTF) Liaisons | 119

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Historians

Suggested Activities

1. Take photos at all events;
2. Preserve a record of activities and accomplishments, in writing, using a scrapbook or digital photos, and/or hard drive or thumb drive;
3. Preserve any published articles about activities as hard copies and digitally; and
4. Share photos with technology person(s) so they can share on social media, website, and in newsletters.



Legislative Committee

The TRTA Legislative Committee shall promote the TRTA legislative priorities and continuously inform members about related legislation.



Suggested Activities



The TRTA State Legislative Committee Chair:

1. Works under the direction of the TRTA Executive Director;
2. Collaborates with the Board of Directors and the Executive Director;
3. Serves as a member of the Capitol Team;
4. Presides at all TRTA State Legislative Committee meetings and communicates with the Committee members regularly; and
5. Calls Legislative Committee meetings as needed, utilizing virtual meetings when possible.

The TRTA District Legislative Committee Chairs:

1. Share TRTA legislative priorities and legislative updates with all Chapter Legislative Committee Chairs and Chapter Presidents for dissemination to Chapter members;
2. Receive information from the Chapter Legislative Committee Chairs to send to the TRTA Legislative Committee and the TRTA Legislative Coordinator;
3. Work with Chapters to maintain communication and personal contact with Texas and U.S. Senators and Representatives; and
4. Be aware of legislative issues and elections in the District and share this information with the State Legislative Committee and State Legislative Coordinator.

The TRTA Chapter Legislative Committee Chairs:

1. Ensure communications with Chapter members;
2. Sign up for the *Inside Line* at www.trta.org and urge all members to do so also;
3. When possible, organize a Chapter contact team (1-3 members) for each local Texas Senator and Representative and each U.S. Congressman representing your area to relay TRTA legislative priorities and concerns;
4. Provide a legislative update for Chapter when needed; and
5. Check the TRTA website for legislative updates.

DO YOU KNOW THE DIFFERENCE?

Defined Benefit vs. Defined Contribution

Do you know the difference between a defined benefit retirement plan and a defined contribution plan? Public school personnel in Texas participate in a defined benefit (DB) program. The DB plan is very important for members of the Teacher Retirement System of Texas (TRS), as our annuities are guaranteed for life by the Texas Constitution. Our annuities are determined by number of years of service, age at retirement, highest salary and a 2.3 multiplier. The state of Texas, by law, is required to contribute a minimum of 6% and a maximum of 10% of the active aggregate teacher payroll to the pension fund. The state contribution was 6.8% in 2019, increased to 7.5% for 2020 and 2021, increased to 7.75% in 2022, increased to 8.0% in 2023, and finally reached 8.25% in 2024. Active employees now pay 7.7% of their salaries into the fund, an amount that increased gradually from 6.4% in 2014. This amount increased again in 2022 to 8.0% and in 2024 to 8.25%. School districts contributed 1.5% through 2020, but this increased to 1.60% in 2021, to 1.70% in 2022, 1.80% in 2023, 1.90% in 2024, and will finally increase to 2.00% in 2025. The increases are the result of the passage of Senate Bill 12 in 2019 during the 86th Legislative Session. TRS manages the plan, invests the funds and pays out benefits to annuitants monthly.

There are groups that want to eliminate defined benefit programs and replace them with defined contribution (DC) plans. DC plans require individuals to make investment and contribution decisions. Unlike DB plans, they are portable from job to job; however, this encourages job transition that is very costly for the workforce, especially public education. The employee must ride the ups and downs of the market. This shifts the responsibility onto retirees, who can outlive the benefits they receive or be faced with unpredictable retirement income. In contrast, the DB plan assures a lifetime annuity. It is especially important for TRS to remain a defined benefit program as most Texas public school districts are not coordinated with Social Security, and TRS serves as their only form of retirement security.

DB vs. DC: Highlights

	<u>DB</u>	<u>DC</u>
Guaranteed for life	Yes	No
Managed by TRS investment professionals	Yes	No
Selling point for recruiting and retaining teachers	Yes	No
Generates a predictable, steady retirement income	Yes	No
Sole guaranteed income for most Texas retirees	Yes	No
Allows retirement on predetermined and predictable formula	Yes	No
Rewards years of service and job stability	Yes	No
Provides secure disability and survivor benefits based on the individual's years of service and established formula	Yes	No

For additional information about defined benefit vs. defined contribution plans, please see the Legislative Resource Guide located on the TRTA website. Visit www.TRTA.org and go to Member Login. Once logged in, choose the Member Resources tab and select Resource Guides.





Member Benefits Committee

The TRTA Member Benefits Committee shall receive and, from time to time, seek, information about member benefits, and make recommendations to the Executive Committee regarding member benefits such as insurance, discounts, and tours to benefit members. The Committee shall collaborate with other Standing and Special Committees as appropriate to further the mission of TRTA.



Suggested Activities

The TRTA State Member Benefits Committee Chair, in alignment with TRTA's agreements with AMBA:

1. Gather information about benefit concerns of retired school and higher education personnel;
2. Discuss whether the acquisition of additional benefits would be beneficial; and
3. Inform the membership of benefits through articles in *The VOICE*, the official news bulletin of the Texas Retired Teachers Association, the TRTA website, social media.

The TRTA District Member Benefits Committee Chairs, in alignment with TRTA's agreements with AMBA:

1. In coordination with AMBA and as approved by the Executive Committee, to promote membership and member satisfaction through usage of TRTA member benefits.

The TRTA Chapter Member Benefits Committee Chairs, in alignment with TRTA's agreements with AMBA:

1. Relate information received from TRTA and District Member Benefits Committee to Chapter members; and
2. Invite your AMBA representative to meeting periodically.



Member Benefits

Thanks to our trusted partner, Association Member Benefits Advisors (AMBA), members are eligible for exclusive insurance plans that are effective and affordable, including dental and vision. To sign up for a plan or receive more information, please contact AMBA. You may reach AMBA by phone Monday through Friday from 8 a.m. to 5 p.m. at **1.888.728.4490** or you may view benefit information and enroll online by visiting **www.myambabenefits.info/trta**.

Instructions for Accessing Your TRTA Member Benefits

All TRTA member benefits have been studied, recommended by the TRTA Member Benefits Committee, and adopted by the TRTA Board. Whether or not to use a benefit is entirely up to you. You can access your member benefits by accessing your TRTA member profile. You can do this by going to our website, **www.trta.org**, and clicking on your name once you login. Typically, your username is your member ID (your member ID is printed on the back of every issue of *The VOICE*). However, if you forgot your Username, please use the Forgot Username link. To retrieve your password, use the Forgot Password link. You will receive an email to reset your password. If you have any difficulty with your username and password, please send an email to **membership@trta.org** or call **1.800.880.1650** and a staff member will assist you.



Organizational Affairs Committee

The TRTA Organizational Affairs Committee (OAC) will review proposed bylaws changes as submitted in accordance with the *TRTA Bylaws*, Article XVI. Amendments. The Committee will prepare recommendations about each proposed bylaw for approval, disapproval, or further study, shall prepare the Committee's rationale for each recommendation, and shall submit both the recommendations and rationale to the Board of Directors. Forms to submit requests to the OAC for bylaws amendment proposals are available from the TRTA office and from the website. Visit www.trta.org, click on the Member Login button, then click on the Member Resources tab, then the *TRTA Bylaws* tab. The Committee shall collaborate with other Standing and Special Committees as appropriate to further the mission of TRTA.

Suggested Activities

The TRTA State Organizational Affairs Committee Chair:

1. Lead the TRTA Organizational Affairs Committee in reviewing, analyzing, and making recommendations to the Board of Directors regarding proposals for amendments to the *TRTA Bylaws*; and
2. Perform other assigned duties to fulfill the objectives of TRTA.



Program Committee (optional)

Suggested Activities

The TRTA Chapter Program Committee Chairs:

1. Develop an interest survey to be used at the last meeting of the year for future program planning ideas;
2. Select a Committee to assist in planning programs; each Committee Chair be responsible for developing a program;
3. Obtain a broad variety of presentations to stimulate, inform, and entertain the membership. Plan a program addressing legislative issues during legislative years. Invite district representative;
4. Organize program presentations with a specific time allowance;
5. Plan one health care program;
6. Invite Mayor to meeting prior to February 1 to present totals on books and community hours;
7. Include media for news coverage; and
8. Introduce the program at each meeting.



Chapter Meeting Programs

Legal Issues

- Identity theft, scams, senior alerts, and fraud against seniors (law enforcement Officer)
- Elder abuse (elder law attorney)
- Wills and estate planning
- Representative from Texas State Securities Board office

Medical, Health and Aging Issues

- Long-term care issues (insurance, local and state resources, ombudsman)
- Stilwell Retirement Home
- Diabetes prevention and management
- Physical fitness (chair exercises, tai chi, etc.)
- Senior-proofing your home
- Local geriatric physician to talk about aging gracefully and staying healthy
- Local pharmacist with newest drug information for geriatric patients, over-the-counter drugs and herbs
- Local physician (orthopedic, heart, vision, and hearing)
- Problems and challenges facing aging membership
- Director of rescue mission (EMS, CPR, Paramedic, etc.) or First Aid instructions and updates
- Emergency response information and home emergency kit

Performances

- Children presenting story time with books received from Children's Book Project
- Local school or college groups (band, choir, and drama)
- Church groups (hand bell, choir, and ensemble)
- Cowboy poetry
- Bag pipe band (show the kilt and the bags and explain their significance) or other musical groups
- Historical Reenactments
- Ventriloquist

Texas and Local History

- Historical sites and markers in your city/county
- Local legends/pioneers or invite a speaker who has in-depth knowledge of Texas adventures
- Genealogy (getting started, using resources, etc.)
- Virtual tour of local museum via PowerPoint or invite the curator of a museum
- Old wives tales and their sources and home remedies
- Celebrate history months (February's Black History Month with talk about music, dolls, inventions, and Kwanzaa)

Hobbies

- Gardening (Farm Bureau or Master Gardener program) and "going green" tips for being environmentally conscious
- Pottery, floral arranging, arts and crafts
- Show and tell with members' collectibles (figurines, stamps, coins, or historic memorabilia)
- Book review, scrapbooking and memory booking
- Local artists, quilters, weavers, model railroad enthusiasts and hobbyists



Community Sources

- Habitat for Humanity
- Conduct a community volunteer service job fair
- Utilize experts from local college/university to speak on newest techniques in upper-level courses
- Fundamentals of basic computer skills (terminology, e-mail, attachments)
- Invite superintendent, mayor, police or fire chief, and sheriff
- Invite former state senator or representative, or Secret Service individual
- Wildflowers, birding, flora and fauna, insects, and nature center
- Better Business Bureau
- Restaurant owner or chef
- Official from military base (if in your area)
- Investment planning and supplementary benefits for retirees

Just for Fun

- Silent or live auction to raise funds for books, scholarships, halfway home, Ronald McDonald House, shelter, etc.
- Antique Road Show with members bringing items and having local antique dealer/expert to estimate value
- Membership style show: parade of hats from recycled items
- Fun places to go and see near and far away; tour famous historical site or other famous place
- Road Scholar and/or have members recount their travels
- Each month meet in a different community served by Chapter and each plans own program
- Cooking a Mexican or other ethnic meal
- Sing-Alongs—songs from 30s, 40s and 50s and Christmas
- Potluck lunch or dinner and provide recipes

TRTA

- Officer installation program
- TRTA District Presidents, Legislative Chair or other Officers to speak
- Visit Austin during legislative session
- November is the Texas Retired Teachers Foundation month



Retirement Education Committee

The TRTA Retirement Education Committee shall collaborate with Districts and Chapters 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 State Retirement Education Committee Chair:

1. Review the existing retirement education program and revise as needed;
2. Identify a list of resource persons for retirement education events;
3. Work with TRTA leaders to ensure that the District Committee Chairs get the support and training needed to carry out their responsibilities; and
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 Chairs.

The TRTA District Retirement Education Committee Chairs:

1. Be a facilitator for TRTA retirement education resources to Chapter Retirement Education Committee Chairs in the District;
2. Provide information of interest for active school personnel and retirees to Chapter retirement education Committee Chairs;
3. Plan TRTA District activities to encourage and increase District-wide events, fairs, programs and individual contact;
4. Serve as resource person to Chapter Chairs;
5. Promote and provide representation of TRTA and retirement information at active teacher organization events; and
6. Encourage Chapter Retirement Education Committee Chairs to post events on websites.

The TRTA Chapter Retirement Education Committee Chairs:

1. Provide retirement education information received from TRTA to active school personnel;
2. Plan and increase special activities such as events, fairs, programs and individual contact. If necessary, combine activities with several Chapters;
3. Assist and encourage District Retirement Education Committee Chairs with retirement activities when appropriate;
4. Promote and provide retirement information of interest to retirees and active school personnel when appropriate; and
5. Communicate retirement events to appropriate sources for publication.



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 teacher lounge snacks occasionally
8. Provide refreshments on a teacher in-service day

Breakfast/Brunch/Dinner or Luncheon

1. Invite a Chapter 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 Chapter membership forms

ISD Retirement Banquet

1. Ask for a few minutes on the agenda
2. Invite a member or District Officer to speak about TRTA
3. Have TRTA and Chapter membership forms available
4. Give “goodie bag” to each retiree with TRTA and Chapter 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.

Community Events and Fairs

1. Get a booth at the local fairs or community events
2. Hand out membership brochures and pamphlets

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 businesses 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
 - 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 Chair.
2. A Chapter 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 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 (Chapter)."
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 (Chapter)."
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 "(Chapter) 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 (Chapter)."
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 (Chapter)."
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 (Chapter)."
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 (Chapter)!"
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 (Chapter)."
May: Leave 100 GRAND candy bar with a label reading "You deserve 100 GRAND—Thank you for your service this year! From (Chapter)."

Steps for planning Faculty Meeting Presentation

1. Contact School Superintendent for his approval
 - Show your prepared script or PowerPoint
 - Bring the 3 Steps To Plan Your Future brochure
 - Bring the TRTA Facts Sheet and Answer Sheet to accompany the 3 Steps To Plan Your Future brochure which may be printed off of the TRTA website
2. Schedule with principals
3. Find out how many pamphlets are needed
4. Log in to your member profile on the TRTA website. Under the Members Resources tab, select the Retirement Seminar tab and access the Chapter Portal. Once you are on the Chapter Portal page, select "Retirement Seminar Request." Instructions on the page will guide you through the submission process. After your request is submitted, the state office will review it, create the event, and send you a registration link to share with attendees.
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 scheduled with school principals



Standing Rules Committee

Suggested Activities

The TRTA District Standing Rules Committee Chairs:

1. Refer to Section 2, Governing Documents in the *TRTA Leadership Manual* to review current *TRTA Bylaws* and update District standing rules accordingly; and
2. Send the District standing rules to Chapter Standing Rules Committee Chairs; and

The TRTA Chapter Standing Rules Committee Chairs:

1. Review the *TRTA Bylaws* and the District standing rules; and
2. Ensure that the Chapter standing rules comply with the *TRTA Bylaws*.



Technology Contact



Suggested Activities

The TRTA District Technology Contact:

1. Coordinate with District Officers, Committee Chairs, members of TRTA and TRTA staff to gather and develop content to be displayed on the District webpage;
2. Update the District TRTA webpage on a regular basis to ensure timely sharing of information; and
3. Maintain contact with the State webmaster to receive technical assistance, training and materials to ensure that the District webpage is being updated correctly.

The TRTA Chapter Technology Contact:

1. Coordinate with Chapter Officers, Committee Chairs, Chapter members and TRTA staff to gather and develop content to be displayed on the Chapter webpage;
2. Update the Chapter TRTA webpage on a regular basis to ensure timely sharing of information; and
3. Maintain contact with the State webmaster to receive technical assistance, training and materials to ensure that the Chapter webpage is being updated correctly.



Texas Retired Teachers Foundation (TRTF) Liaisons

Suggested Activities

The objective of Foundation Liaisons is to keep members informed about the Foundation's activities and goals, as well as to help raise funds to support the Foundation's programs.

1. Speak on behalf of the Foundation at functions such as Chapter and District meetings, as well as answer basic questions about the activities and state of the Foundation;
2. Provide donation cards and/or brochures to Chapter members as needed or direct them to the TRTF website (www.trtf.org);
3. Accept donations from Chapter members or other people in the community and send all donations to the Foundation office at 313 E. 12th Street, Suite 220, Austin, TX 78701;
4. Provide copies of First-Year Teacher Scholarship and Classroom Assistance Grant applications to fellow TRTA members, family, friends, colleagues and/or members of the community; and
5. Promote Foundation month and the TRTF Annual Appeal letter in November (or during fall meeting).

Download the TRTF Resource Guide and receive regular news updates from www.trtf.org or by emailing help@trtf.org for any questions or concerns.

What is the Texas Retired Teachers Foundation (TRTF)?

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 nonprofit organization. TRTF supports several charitable programs: "A Helping Hand," the Lehr-Pritchard "A Helping Hand" Endowment Fund, Classroom Assistance Grants, First-Year Teacher Scholarships, Disaster Relief, and TRTF's newest program, The Dr. Kate Bell and E.L. Galyean Assistance Fund.

First-Year Teacher Scholarships are to provide funds to assist the recipient in purchasing materials for his or her classroom.

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 do not need to be a member of TRTA.

Disaster Relief provides grants to TRS annuitants struggling after disasters (such as hurricanes, tornadoes, wildfires, or flooding).

Donations may be designated for any of the Foundation's charitable programs: "A Helping Hand," the Lehr-Pritchard "A Helping Hand" Endowment Fund, Classroom Assistance Grants, First-Year Teacher Scholarships, Disaster Relief, and TRTF's newest program, The Dr. Kate Bell and E.L. Galyean Assistance Fund. Donations may be made in honor or in memory of someone.

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SECTION 5: CALENDARS

Overview

This section contains directories for the following:

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- State Officers Monthly Calendar | 124
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- District Presidents Monthly Calendar | 127-128
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- Membership Renewal Calendar | 132

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TRTA Dates to Remember

January 1, 2026–December 31, 2026	Contributions for the following programs: Children's Book Project Community Volunteer Service Hours Scholarships and Grants
February 1	Individual report to the Chapter Committee Chairs: Community Volunteer Service Hours
February 15	Chapter reports to the District Committee Chairs: Children's Book Project Community Volunteer Service Hours Scholarships and Grants
March 1	Membership drive begins
March 1	District reports to the State Committee Representative: Children's Book Project Community Volunteer Service Hours Scholarships and Grants
March 1	State reports on books, volunteer hours, scholarships and grants due to the TRTA office
May 31	TRTA District Committee Chair information due to the TRTA office
May 31	TRTA Chapter Officer information due to the TRTA office
June 30	TRTA Chapter Committee Chair information due to the TRTA office
June 1	State Committee reports will be submitted at the June Board of Directors meeting
July 1–June 30	Membership year
August 1	TR-1 and TR-2 forms due to TRTA office
November 1	E. L. Galyean Service Award nominations deadline
December 1	TRTA District Officer information due to the TRTA office
March 31, 2027	TRTA Day at the Capitol



State Officers Monthly Calendar

Scheduled meetings are subject to change at the discretion of the Executive Committee.

July

1. Attend the TRTA Board of Directors meeting.

July/August

1. TRTA Standing Committees communicate.

September

1. Attend District Fall Conferences.

October

1. Attend the TRTA Executive Committee and TRTA Board of Directors meetings.
2. Attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years) Committee meeting.
3. Attend District Fall Conferences, if scheduled.

November

1. Foundation month.

December

1. Submit Officer and Committee reports to the TRTA office on current year's activities for inclusion in the January TRTA Board of Directors packet.

January

1. Attend TRTA Executive Committee and TRTA Board of Directors meetings.
2. Conduct District Presidents regional conference calls.
3. Communicate with the TRTA Standing Committees to revise resource guides and one-page summaries (if applicable).
4. Attend the TRTA State event (in even-numbered years) Committee meeting.

February

1. Attend TRTA Executive Committee meeting.

March

1. Prep for the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).
2. Submit Officers and Committees reports by March 1 to the TRTA office for inclusion in the TRTA Board of Directors packet (in even-numbered years).
3. Attend the TRTA Board of Directors meetings.
4. Attend the TRTA Executive Committee meeting, if scheduled.

April/May

1. Attend the Spring Conferences.
2. Attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).
3. TRTA President appoints Standing Committee Chairs and Committee members, if applicable.
4. Attend the TRTA Executive Committee meeting to review and approve the *TRTA Leadership Manual*.

June

1. Attend the TRTA Executive Committee meeting and confirm the list of the TRTA Standing Committee members.
2. Attend TRTA Board of Directors meeting (conduct Executive Director annual review).
3. Attend the TRTA District Presidents Leadership Conference, if scheduled.



State Standing Committee Chairs Monthly Calendar

Scheduled meetings are subject to change at the discretion of the Executive Committee

July

1. Attend the TRTA Board of Directors meeting and the TRTA District Presidents Leadership Conference (at the request of the President).

July/August

1. Conduct Standing Committee meeting.
2. Review the previous Committee's annual report.
3. Request that Standing Committee members communicate with their District counterparts and encourage them to communicate with their Chapter counterparts:
 - (a) communications can be expected during the year;
 - (b) distribute Committee members' contact information; and
 - (c) relay information from the State.
4. Collect supplemental materials for the Committee's use.
5. Maintain regular contact with your Committee members throughout the year.

September

1. Attend District Fall Conferences, if applicable.
2. Communicate with District counterparts and express their importance as liaisons between the Chapters and TRTA.

October

1. Attend TRTA Board of Directors meeting (at the request of the President).
2. Attend District Fall Conferences, if applicable.
3. Continue communications with District counterparts.

November

1. Promote Foundation month.

December

1. Submit Committee's report to the TRTA office for inclusion in the January TRTA Board of Directors packet, if applicable.
2. Remind District Committee Chairs to communicate with the Chapter Committee Chairs of February 15 deadline for collection of books, volunteer hours, scholarships and grants.
3. Remind the District Committee Chairs of the March 1 deadline to submit reports to the TRTA Standing Committee representative.
4. Remind District Committee Chairs to communicate with Chapter Committee Chairs on the January 1 beginning date of collection of books, volunteer hours, scholarships and grants.

January

1. Attend TRTA Board of Directors meeting (at the request of the President).
2. Submit completed resource guides and one-page summaries to the TRTA office (in even-numbered years) by deadline specified.
3. Encourage attendance at the TRTA Day at the Capitol (in odd-numbered years).
4. Communicate with District counterparts and encourage the District Committee Chairs to attend the TRTA State event (in even-numbered years).

February

1. Compile total number of books, volunteer hours, scholarships and grants received from District committee counterparts and submit final reports by March 1 to the TRTA office.
2. Encourage District Committee Chairs to attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).
3. Submit Committee's report by March 1 to the TRTA office for inclusion in the TRTA Board of Directors packet (in even-numbered years).



March

1. Attend the TRTA Board of Directors meeting.
2. Identify Committee members who will attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).

April

1. Attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).
2. Ensure District Committee counterparts have received training materials in order to conduct training sessions at the District Spring Conference.

May

1. Attend your District Spring Conference.

June

1. Attend TRTA Board of Directors meeting (at the request of the TRTA President).
2. Make appropriate recommendations for Committee member appointments to the TRTA President.



District Presidents Monthly Calendar (Two-Year Cycle 2026-2028)

Ongoing Monthly Reminders:

1. Encourage Chapters to follow the *TRTA Bylaws*.
2. Encourage Chapters to continue their membership recruitments.
3. Encourage Chapter Presidents/Secretaries to submit a list of names of deceased members to their District counterparts.
4. Monitor communications for District newsletters, District web page, and/or District Facebook page. In addition, monitor communications with your Chapter Presidents.
5. Schedule visits to Chapters.
6. Submit Officers/Committee Chairs to the TRTA office upon request.
7. Encourage all Chapters to advertise and encourage attendance at a retirement education seminar.
8. Conduct Executive leadership team meetings throughout the year, as needed.

July

1. Attend the TRTA District Presidents Leadership Conference, if scheduled.
2. Participate in the District budget committee planning.
3. If needed, ensure that the District Committee Chairs have appointed their Committee members.
4. Ensure that District Officers/Chairs have a copy of their duties.
5. Submit yearly meeting dates/locations to District Officers/Chairs and Chapter Presidents, including lists of District Officers/Chairs.
6. Ensure that a District audit is conducted and the bonding form is reviewed prior to August 1st.

August

1. Prepare agenda and conduct a meeting with District Officers, District Committee Chairs, and Chapter Presidents (leadership team) to plan for the year, adopt the Audit Committee report and present the proposed District budget.
2. Receive Nominating Committee report, in odd-numbered years.
3. Consider E. L. Galyean Service Award nominees.
4. If applicable, prepare District Fall Conference agenda and materials (budget, newsletter, memorial list, etc.).
5. If applicable, communicate with the TRTA Officer assigned to your District Fall Conference regarding travel plans.
6. If applicable, collect registration from each Chapter for District Fall Conference.
7. Elect district Officers at District Fall Conference in odd-numbered years.
8. Consider possible areas to organize new Chapters.

September

1. Refer to August, # 4, 5, 6 & 7.
2. Confirm submission of bonding form and Treasurer reports to TRTA.

October

1. Refer to August, # 4, 5, 6 & 7.
2. Submit proposals for amendments to the *TRTA Bylaws* by November 1 to the TRTA office.
3. Prepare and finalize E. L. Galyean Service Award nomination. Submit to the TRTA office by November.

November

1. Refer to August, # 4, 5, 6 & 7.
2. Promote Foundation month.

December

1. Remind District Officers/Chairs to communicate with their Chapter counterparts to compile book totals, volunteer hours, and any scholarships and grants.



January

1. Remind Chapter Presidents to consider their delegates for the TRTA House of Delegates (in even-numbered years).
2. Consider District Officers/Chairs who plan to attend the TRTA State event (in even-numbered years).
3. Remind the Chapters to submit reports for book totals and volunteer hours, to TRTA or the District counterpart by February 15.
4. Remind the Chapter Treasurers to submit scholarships and grants to the District Treasurer by February 15.
5. Participate in regional cluster calls from TRTA.

February

1. Remind the District Committee Chairs to submit reports for book totals, volunteer hours, the District scholarships and grants, to the respective State Committee representative by March 1.
2. Confirm which District Officers/Chairs are attending the TRTA State event (in even-numbered years).
3. Discuss appointment of Committee Chairs for next membership year.

March

1. Remind Chapters to submit delegate forms to the TRTA office (in even-numbered years).
2. Submit District delegate forms to the TRTA office (in even-numbered years).
3. Prepare virtual caucus agenda (refer to page 65, Section 3: OFFICERS page in *TRTA Leadership Manual*) for TRTA House of Delegates (in even-numbered years).
4. Work with the District First Vice-President to determine the awarding of the individual membership incentives funded by the TRTA office.

April

1. Attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years) and conduct virtual caucus meeting.
2. Ensure that District Officers/Chairs receive the one-page summaries and know that they are to assist in conducting training.
3. If applicable, prepare the Spring Conference agenda and materials.
4. If applicable, collect registration form from each Chapter for Spring Conference. Encourage all Chapter Officers/Chairs to attend.
5. Communicate with the TRTA Officer that will be attending your Spring Conference regarding travel plans.
6. Conduct a Spring Conference and install Officers, present awards, report on TRTA Day at the Capitol (in odd-numbered years) or TRTA State event (in even-numbered years) and provide training sessions, if applicable.
7. Review the funding process for the Spring Conference provided by the TRTA.
8. Submit Committee Chairs to the TRTA office upon request.

May

1. Conduct a Spring Conference and install Officers, present awards, report on TRTA Day at the Capitol (in odd-numbered years) or TRTA State event (in even-numbered years) and provide training sessions, if applicable.
2. Review the funding process for the Spring Conference provided by TRTA.
3. Elect/appoint Nominating Committee members to prepare a slate of Officers for election at the District Fall Conference, if applicable.
4. Appoint the District budget and Audit Committee members.
5. Confirm with your District Treasurer that the registration forms and funding information from the Spring Conference have been submitted to the TRTA office, if applicable.

June

1. Communicate with outgoing and incoming District Officers/Chairs about the transition of leadership roles and distribution of appropriate materials.
2. Secure locations for District Officers, District Committee Chairs, and Chapter Presidents meetings, District Fall Conference, if applicable, and Spring Conference, if applicable.



Chapter Presidents Monthly Calendar (Two-Year Cycle 2026-2028)

Ongoing Monthly Reminders:

1. Review the *TRTA Leadership Manual* and follow the *TRTA Bylaws*.
2. Conduct Chapter Leadership Committee meetings (Officers and Committee Chairs) throughout the year.
3. Ensure that programs are planned for the Chapter meetings (minimum of 5), prepare agendas, and conduct the Chapter meetings.
4. Schedule Officers/Committee Chairs to provide updates at the Chapter meetings throughout the year.
5. Encourage membership recruitment and retention. Utilize at-large member list for membership recruitment.
6. Remind Chapter Treasurer or Membership Chair to submit reports to the TRTA office each month or report on TRTAPortal in a timely manner.
7. Ensure that a list of names of deceased members is submitted to the District and TRTA office on a regular basis.
8. Monitor newsletter and/or Chapter Facebook page, if applicable. Ensure that updates are sent to the TRTA office for Chapter webpage, if applicable.
9. Schedule District Presidents' visit to at least one Chapter meeting within the two year cycle.
10. Collaborate with District Retirement Education Committee Chair to advertise and encourage attendance at a retirement education seminar.
11. Submit Officers/Committee Chairs to the TRTA office upon request.
12. Attend District Leadership Team Meetings in appropriate months for your District.

July

1. Ensure that a Chapter audit is conducted and the bonding form is reviewed, then submitted to the TRTA office by August 1.
2. Prepare agenda and conduct an Executive Committee meeting with Officers and Committee Chairs (leadership team) to plan for the year.
3. Ensure that Committee Chairs have appointed Committee members.
4. Review the proposed Chapter budget.
5. Confirm that all Officers/Chairs have their resources and understand their duties.
6. Develop a yearly calendar of important dates and activities for the Chapter.

August

1. Complete registration form for the District Fall Conference, if applicable and submit to the District President.
2. Ensure audit is complete and prepare report for the September meeting.
3. **Confirm submission and/or update of bonding form and submission of Treasurer's Reports (T-1 & T-2) to TRTA.**

September

1. Adopt the Audit Committee report.
2. Adopt the Chapter budget.
3. Attend District Fall Conference if applicable.

October

1. Attend District Fall Conference if applicable.
2. Submit any proposals for amendments to the *TRTA Bylaws* by November 1 (of odd-numbered years) to the TRTA office, if applicable.

November

1. Promote Foundation Awareness month.

December

1. Remind Committee Chairs to finalize reports on books, volunteer hours, scholarships and grants by December 31.
2. Encourage members to attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).



January

1. Remind Committee Chairs to submit reports of volunteer hours, and book totals, to TRTA or the District Chair counterparts by February 15.
2. Remind the Chapter Treasurer to submit scholarships and grants to the District Treasurer by February 15.
3. Begin new calendar year for collection of books, volunteer hours, scholarships and grants.
4. Receive TRTA Awards Program packet via email.
5. Remind members to register for the TRTA Day at the Capitol (in odd-numbered years) or for the TRTA State event (in even-numbered years).
6. Discuss appointment of Committee Chairs for next membership year. If applicable.

February

1. Remind Treasurers that dues sent after March 1 will carry over to the next membership year.
2. Discuss appointment of Committee Chairs for next membership year. If applicable.

March

1. Submit Chapter delegate forms to the TRTA office (in even-numbered years).
2. March 1 membership campaign begins.
3. Elect Officers in even-numbered years.

April

1. Attend the TRTA Day at the Capitol (in odd-numbered years) and the TRTA State event (in even-numbered years).
2. Encourage incoming and current Officers/Chairs to attend the Spring Conference; complete registration and send to District President, if applicable.

May

1. Encourage incoming and current Officers/Chairs to attend the Spring Conference, if applicable and complete registration and send to District President.
2. Install Officers and present awards.
3. Continue membership drive of those retiring from each ISD within your Chapter area, if applicable.
4. Attend retirement receptions held for this year's retirees or plan reception, breakfast, luncheon, or dinner, if applicable.
5. Appoint the Chapter budget and audit Committee members.

June

1. Arrange an opportunity for outgoing and incoming Officers/Chairs to discuss the transition of leadership roles and distribution of appropriate materials.
2. Ensure that a proposed budget is prepared for the upcoming year.

Legislative Related Activities



Odd-Numbered Years

January

The second Tuesday in the month, the Texas Legislature starts its 140-day regular session. Invite local legislators to attend a meeting during the regular session.

February

Make plans, if scheduled, to attend the TRTA Day at the Capitol in March or April.

March or April

Attend the TRTA Day at the Capitol. Communicate with your local legislators about key issues affecting public school and higher education retirees.

April-May

Monitor activities in the Legislature affecting the Teacher Retirement System (TRS) pension and health insurance funding.

June-August

Review changes made by the Legislature; invite local legislators to attend a meeting in the fall.

September-December

Review changes made by the Legislature and identify priorities for the subsequent legislative session. Write, call or meet with local legislators concerning those changes enacted and those still needed for public school and higher education retirees.

Even-Numbered Years

January-March

Plan to hold a candidate forum prior to the March primaries. Invite all candidates and current officeholders.

March

Vote in the party primary of your choice.

April-August

Write, call or visit with candidates about important issues affecting retirees. Be sure to get candidates' positions on these issues in writing.

September-October

Invite candidates to attend a meeting for a candidate forum to discuss important issues affecting retirees.

November

Be sure to vote.

December

Thank candidates for attending your forum and update your personal contact with the elected official(s). Offer them information and any help regarding issues facing retired public school and higher education employees.



Membership Renewal Calendar

Note: Renewal correspondence schedules are subject to change.



TRTA membership drive begins March 1.



Membership drive concludes on the last day of February of the following year.

TRTA membership year begins July 1 and ends June 30.

At-Large Renewal Correspondence

Email renewals begin in March and continue through April.

The first paper renewal is mailed in May.

Email renewals continue through June/July.

The second paper renewal is mailed in August.

Email renewals continue through September/February.

The third paper renewal is mailed in October.

Chapter Renewal Correspondence

Email renewals begin in July.

The first paper renewal is mailed in August.

Email renewals continue through September/February.

The second paper renewal is mailed in October.

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