Indiana Retired Teachers Association



www.retiredteachers.org

Advocating for all Indiana Retired Educators

A Message From the President



from many events because of health needs. For those local chapters that I was able to visit, it was a great pleasure to get acquainted with so many of you. I hope that as your Immediate Past President, I can visit some of the other local chapters that I didn't have the

opportunity to meet.

A great "Thank you" goes to my Executive Board who carried on my task during my absences. Another great "Thank you" goes to the entire Board of Directors for your dedication and work during the past year.

We have accomplished several things during this past fiscal year. Probably our most exciting accomplishment was achieved with HB 1537, a two-year stipend (13th Check). Our legislative team has wanted this for many years and it was finally achieved. A large "Thank you!" to Tom Mellish, Steve Bebee, the Legislative Committee, and everyone who wrote their legislator in achieving present and future members. We will use the website as a resource this endeavor.

however, we realized that it was probably inevitable that it would happen. There has been a big push for a number of years by several legislators and the American Legislative Exchange Council (ALEC) to get this through Indiana's Legislature. With Senator Kenley's help this year the task was achieved by attaching it to the Budget Bill. This will definitely affect how we approach our retirement outreach to new teachers.

I highly encourage all members to be pro-active in reaching new members for IRTA. Our Association not only works continually for financial benefits for its members, but it also provides great discounted benefits too. The strength of our Association is based There was not much change in the legislature structure this past on our membership.

The IRTA webpage has continued to be an ever-increasing source of information for IRTA members and non-members. The Facebook and Twitter connections make it easy for anyone to follow IRTA. The addition this year of Tom's "Indiana EdCAST" made it easy for retired educators. Future educators are the easy target because they all members to follow the happenings at the State House. Thank you are not involved in the process, have the knowledge, the awareness, Tom Mellish and Steve Bebee for your work in this new outreach.

Our Executive Director has added many additions to our list of discounted benefits. If you haven't visited our website recently, make sure that you do, as many new discounts do not appear in our current IRTA brochure.

My time as your Indiana Retired Teachers In closing, I want to thank everyone for your loyalty and service Association President has quickly come to a to your local chapter and the state Association. It takes many close. I have greatly enjoyed serving you in workers to keep our Association functioning. Your work does not this capacity, even though I have been absent go unnoticed. Thank you and keep up the good work.

"I don't know what your destiny will be, but one thing I know: the only ones among you who will be really happy are those who have sought and found how to serve." - Albert Schweitzer

Executive Director's Message



Just a year or two ago podcasts, webinars, tweeting, and blogs were not part of the IRTA vocabulary or in our offerings. Today we use these methods for spreading information through our website. The IRTA website continues to evolve and offers updated information, educational materials and benefits to our members. Our website is an essential and effective tool to reach out to

to reach out to college seniors and future educators with financial We were disappointed to see the passage of the Defined Contribution; information as they attempt to make informed decisions about their pension decision when they sign their first contract.

> Your board is committed to keeping IRTA relevant and important for retired and active educators in the future. Their focus on updating policies and bylaws throughout this year and next year will allow the needed flexibility in today's association environment. New committees, or merging of committees, with new missions and responsibilities are part of the updating process. Hours of reading and discussion has already taken place and will continue until all of the updating is complete. We hope you will support the board through this entire process of revision.

> election year. In this political environment that is not friendly to public pensions, it is very tough to push through increases, let alone stay status quo on benefits. This is the very reason IRTA needs to stay very involved in the legislature and advocating for or experience. Pushing the Defined Contribution Option bill language behind closed doors late in the legislative session through the Budget Bill is just one of the ways our legislature operates. Many legislators that voted in favor of the Budget Bill had no idea what all had been included into the 165 page document.

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Meet Your New Board Members

AREA 1 DIRECTOR - ELECT



Jo Ann Manes, Lake County RTA, is nominated for a first term, Area 1 Director of IRTA. Jo Ann, is a resident of Dyer, Indiana in Lake County. She received her B.A. from David Lipscomb University and a M.A. from Purdue-Calumet. Jo Ann taught in Hammond for 43 years—37 years in the primary grades and the last six years as Media Specialist. Jo Ann has been the Lake County Retired Teachers Association parliamentarian for the last six years, and was installed in April, 2017 as the LCRTA president for the 2017-2019 term.

Other volunteer activities include being a court appointed a Volunteer Advocate for Seniors. Jo Ann is completing her 2015-2017 term as Indiana State president of Delta Kappa Gamma Society Int'l. DKG is an educational organization of teachers promoting professional and personal growth and educational

excellence. She also is a Sunday school teacher and a member of the media committee at the Park Forest Church of Christ. Jo Ann was married to Wally for twenty years; he died in 2008. She has two step sons and three granddaughters.

AREA 5 DIRECTOR - ELECT



Tom Brogan, Johnson County RTA, is nominated for a first term, Area 5 Director of IRTA. Brogan is currently a member of the IRTA Legislative Committee and the Johnson County IRT executive board. He has lived in the Indianapolis area for the last 45 years. After growing up in Jeffersonville, he attended Ball State, graduating in 1973, with a Social Studies major. His first teaching job was at Center Grove High School, where he remain for the next 40 years, 34 years in the same classroom. He taught most of the subjects under the Social Studies umbrella, concentrating on AP History and AP Government. Extracurricular, Tom, coached different sports and Academic Teams while teaching. His longest commitment was to the constitutional program, We the People. Starting at the beginning in 1987, he had classes participating until his retirement in 2013. Even in retirement Tom judges the State competition and continues mentoring teams for the National competition. Also,

he helps students prepare for to take the Advance Placement exam. Mr. Brogan was active in ISTA as a school corporation officer and on the contract negotiating teams.

When asked what have you been doing in retirement, Tom? First answer, Volunteerism: Working in a food pantry, CASA, Greenwood Police Merit Board, Habitat for Humanity. Second answer, Exercise: Avid biker (that doesn't mean fast), hiker, and visits to the gym. Third, travel: enjoys active/educational group trips and the grandkids live out of town. His goal is to have growth in membership and greater communication among the four counties in District 5.

AREA 7 DIRECTOR - ELECT



Phil Boley, Hancock County RTA, is nominated for a first term, Area 7 Director of IRTA. Boley spent 37 years in public education as a teacher, principal, and superintendent. He has his bachelor's, master's and specialist's degrees from Indiana University. Phil began his career as a seventh grade English teacher at Mt. Vernon MS in Fortville. After seven years, he was named assistant principal at Mt. Vernon HS, where he remained for four years prior to becoming principal at Winamac HS in 1983. After, Phil was hired to become principal of the newly consolidated Franklin County HS in Brookville. From Franklin County, Phil moved on to Greenfield-Central HS where he was principal for six years prior to becoming assistant superintendent at Decatur County Schools. In 2005, Phil left

Decatur County to become superintendent at Clinton Central Schools, his last post before retirement.

Phil became interested in international education while principal at Greenfield-Central High School, which at that time had three international partnerships. Phil is a former member of the NAESP Partnerships International committee, a position from which he was tapped to serve on several committees for the Council on Standards for International Educational Travel, an exchange organization accrediting institution. After having served as chair of the evaluation committee for CSIET, he was elected to the CSIET board of directors on which he served for six years. Phil is the co-founder and former executive director of Global Indiana: A Consortium for International Exchange, and now works part-time as vice president of the Chinese Education Connection, a company which provides international professional development for American and Chinese educators.

Phil is married to Dr. Paula Boley, Dean of the College of Health Sciences at Rhodes State University in Lima, Ohio. They are the parents of another teacher, Leah Henley, who teaches AP and senior English at West Creek High School in Clarksville, Tennessee. Leah and her husband provided two grandchildren, Ellie 6, and Nick 3.

AREA 9 DIRECTOR - ELECT



Andy Guarino, from Evansville RTA, is nominated for a first year term for Area 9 of IRTA. Andy is from Evansville, where he lives with his wife of 34 years, Vaneta Becker, who is a State Senator.

Andy has a bachelor's degree in Physical Education and Health, 2 master degrees, one in Special Education, and the other in Adult and Community Education. He also has an Administrative license in Secondary Education. Andy served 4 years as a Special Education teacher, 10 years as an Assistant Principal, 17 years as a Principal, 2 years as a Central office administrator, 2 years as a higher education administrator, and 5 years as a mental health administrator. He also coached baseball, basketball and track. Currently he is President of the Evansville Vanderburgh school board of trustees, serving the board for the last 3.5 years. He also is a member of the Evansville Teachers Federal Credit Union, and is

a former President of the Evansville Retired Teachers Association. Andy enjoys playing golf, watching college football and basketball, and traveling with his wife Vaneta. Andy would like to continue supporting our Retired teachers, as well as our current teachers in in the field today.

Thank You to Our Outgoing Board Members

We cannot express enough thanks to our five outgoing IRTA Board Members and two IRTF board members. Jay Bechtel, Pam Hallock, Ray Pavy, Cal Biddle and Carol Grieser all served as Area Directors and on our board. We cannot thank them enough or appreciate the time they gave to support IRTA at the committee, local and state levels. We will miss their input, leadership and forward thinking on the future of IRTA.

Jerry Sparks and Charlie Dilk were original founding members and past presidents of our IRTF Board and helped shape and develop the Foundation. We thank them for their foresight and leadership they provided IRTF in its infancy.

These seven provided IRTA/IRTF with over 40 years of service and expertise.



Foundation News

A HandUP

The mission of the Indiana Retired Teachers Foundation is to promote the welfare of retired educators, support those currently teaching, encourage those entering the profession, and partner with the IRTA in pursuing these aims. One way that the IRTF promotes the welfare of retired teachers is through its "A Hand UP" program.

"A Hand UP" seeks to give financial assistance to IRTA members in an effort to uplift their quality of life when a need or emergency is encountered. "A Hand UP", under

the direction of Chairperson Sally Klingerman, provides \$1000 grants to members undergoing a temporary or emergency hardship. Examples of these needs may include, but are not limited to: housing expenses, health care, transportation, legal assistance, nutrition.

The application process is easy. The application is online or can be obtained by calling the office to request a copy, and it may be filled out by the individual in need or a friend of that person. Applications remain confidential. Once the application is sent to the IRTA office, the "A Hand UP" committee reviews and rules on the application. If accepted, funds are quickly dispersed to the IRTA member.

The IRTF programs are funded mainly by donations. If you or someone you know needs "A Hand UP" please fill out an application.

2017 IRTA Fall Workshop Dates, Locations and Times

Areas 1 & 2:		Essenhaus 240 US- 20 Middlebury, IN (574) 825-9447
Areas 3 & 6:	October 10 9:00 AM EDT	Zion Lutheran Church 173 Hale Dr. Wabash, IN
Areas 4 & 5:	October 2 9:00 AM EDT	Clay County Fairgrounds 4H Building, 6650 N State Road 59 Brazil, IN
Areas 7 & 10:	October 3 9:00 AM EDT	Decatur County SC Admin Building 2020 N Montgomery Rd. Greensburg, IN (812) 663-4595
Areas 8 & 9:	October 4 9:30 AM EDT	Gasthof Village Restaurant 6747 E. Gasthof Village Rd. Montgomery, IN (812) 486-4900

New IRTF Board Members

IRTF has named two new board members to fill the positions of original board members Charlie Dilk and Jerry Sparks. Ray Pavy and Jay Bechtel will begin their duties in July. Both Ray and Jay have just completed terms on the IRTA Board of Directors. We thank them for their willingness to continue to serve IRTA/IRTF.







2017 IRTA CASA Award



Eugene Wease is dedicated and serious with his responsibilities as a Lake County CASA Program volunteer. After completing thirty hours of preservice training, Mr. Wease was sworn in April 1, 2008, as a CASA volunteer for The Lake County CASA Program in Crown Point, Indiana. As

a Court Appointed Special Advocate, Eugene pledged to represent the best interests of abused and neglected children in the courtroom, in essence committing to help ensure for them safe, permanent homes as quickly as possible. In addition to working two cases over the past two years, he has also served as a member of the Volunteer Initial Visit Case Planning (V.I.P.) Team.

Mr. Eugene Wease is a loyal, experienced and effective volunteer child advocate, and like his fellow V.I.P. team members, performs a crucial function in the advocating process for this, the second largest CASA/GAL program in the state. In accordance with state statute, Senior Juvenile Court Judge MaryBeth Bonaventura appoints this program to represent the best interest of children, newborn through 18 years old, found to have been abused or neglected by their parents or guardians. Unfortunately, child abuse doesn't observe week-ends or holidays. In any given week, as many as ten children are appointed to this program for representation. Presently, the program represents over 2,000 children. However, there is often a shortage of available volunteers to work newly appointed cases. And so, every Tuesday, in order to avoid delaying the process of providing best interest representation in the courtroom to every child in need of services, Eugene and his fellow V.I.P. team members are asked to perform an essential function of child advocacy: to visit children and check on their wellbeing in their temporary placements as soon as possible after removal from the care (or lack thereof) of their abusive or neglectful parents.

Eugene accepts these weekly assignments diligently, making visits to children in foster homes and residential treatment facilities throughout the county. During these visits, he uses his volunteer training and excellent communication skills to identify a child's needs and wishes, to evaluate the child's placement accordingly, and then to report his findings to our staff. His reports contain valuable, child-focused information and recommendations which are used by judges in making appropriate orders for children, which the child welfare community uses to care for children in placement.

Through his volunteer work, Eugene Wease has graciously and generously facilitated for and provided many, many children in Lake County the hope which every child deserves to realize: to live in a safe, permanent home, and for that our county owes him a large debt of gratitude.

Eugene received the national award from the National Retired Teachers Association for his work with CASA and the Retired Teachers Association, when he was the State President. He was invited to Washington DC to receive the award.



Member Benefits for every season



Association Member Benefits Advisors is proud to be the benefits provider for the Indiana Retired Teachers Association!

Your Member Benefits Include:

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800.258.7041

This summer and fall we will pursue ideas with legislators that will find ways to fund a supplemental COLA allowance reserve account to allow funding of COLA's or increases to the 13th Checks. Medical, prescription drugs, and utility cost continue to increase along with inflation that cause stress to our limited pension amounts. We will continue to fight against plans to make Defined Contributions the default plan for new educators and to increase the age for early retirement and any other legislation that will hurt public pension plans.

Financially the IRTA budget finished in the black for the fourth year in a row and this trend looks like it is secure for the upcoming year. We continue to tighten the budget and look for cost reductions. We shopped for a new insurance package for the staff, renegotiated the office lease, and are in the process of renegotiating our contract with AMBA. The budget we hope you will adopt is lower and tighter than last year and below the 2012 budget levels. IRTA benefits and savings have doubled in the past two years making an IRTA membership a great bargain. Resources and information that are now available on the website has exploded. This however will not continue if our membership does not increase.

Regular membership has dropped for the second consecutive year although our associate memberships are up for the second year in a row. If this becomes a trend for membership, our 2012 budget levels will not be sustainable. Membership is everyone's responsibility and the best way to get new members is to reach out and make personal contacts. Let potential members know of the increase of benefits and savings by being an IRTA member. IRTA advocacy for pensions, educational resources and materials that will continue to grow and support members in their retirement has made this the best time to be a member. Make it a personal mission and goal to recruit your former colleagues to IRTA. You will be helping the association and yourself by not having to cut services or increase dues.

The IRTF continues to support future educators, active teachers, and retired teachers in need with their three-prong approach. Ten scholarships were awarded last year and nine more this year for future educators. This year another 21 Active Grants were awarded across the state to help meet teacher needs and enhance student opportunities. A couple of Hands UP grants were awarded to retirees in need of support.

IRTF has so much potential to offer IRTA and is a jewel in the rough. I dream that the IRTF will become self-funded and be able support all their programs through investment gains and interest. By building the foundation donations and gifts program base this is a very real possibility. A donation to IRTF is tax deductible, so please seriously consider making a yearly donation to IRTF, bequeathing the foundation, or making the foundation part of your required minimum distribution disbursement each year. The IRTF potential is only limited by the amount of donations it receives each year.

Thank you for being a proud IRTA member, supporting IRTA and being a grassroots advocate for our association. You are what makes IRTA great.

INDIANA RETIRED 1 BALAI			N		INDIANA RETIRED TE VARIANO EIGHT MONTHPEF	E REPORT			
	A	s of 4/30/2017				Year-to-date	-	udget-year-to-o	iato
ASSETS:						Amount	Amount	Var-amt	Var-%
CURRENT ASSETS: CASH DUE FROM INVESTMENTS PREPAID EXPENSES DUE FROM LIFE MEMBERS DUE FROM LIFE	\$	58,705 706 15,476 11,245 4,963			INCOME: REGULAR MEMBER DUES ASSOCIATE MEMBER DUES GAINV(LOSS) ON SALE-SECURITIES TCU INTEREST-ASSOCIATION INVESTMENT INCOME-TOTAL FLORIDA MEETINGS INCOME	593,525 20,827 110 139,421 2.070	665,000 21,500 55,000 5,000	(71,475) (673) 84,421	-10.7% -3.1% 153.5%
TOTAL CURRENT ASSETS		\$	91,095		REPRESENTATIVE ASSEMBLY INCOME MISCELLANEOUS INCOME	1,026 476	6,000 14,000		
INVESTMENTS:					ROYALTY ENDORSEMENT FEE	39,132	57,500	(18,368)	-31.9%
INVESTMENTS PR MED ACCOUNT INVESTMENTS CD ACCOUNT INVESTMENTS CORP ACCOUNT	\$	171,379 261,932 1,389,358			TOTAL INCOME OFFICE OPERATIONS:	796,587	824,000	(27,413)	-3.3%
INVESTMENTS CORP ACCOUNT INVESTMENTS-LIFE ACCOUNT		644,024			OCCUPANCY-RENT	24,584	59,000	(34,416)	-58.3%
					INFORMATION TECHNOLOGY & MAINT.	16,533.03	36,000	(19,467)	-54.1%
TOTAL INVESTMENTS		\$	2,466,692		STAFF TRAVEL, PARKING & MEALS	2,220	5,000	(2,780)	-55.6%
PROPERTY AND EQUIPMENT:					SALARIES-OFFICE STAFF	167,873	250,000	(82,127)	-32.9%
FIX ASSETS - FURNITURE & FIXT	s	151.066			PAYROLL TAXES & RETIREMENT EXPENSE GROUP INSURANCE	23,012 47,380	37,500 83,000	(14,488) (35,620)	-38.6% -42.9%
LEASEHOLD IMPROVEMENTS		2,292			OTHER INSURANCE	1,950	3,650	(1,700)	-46.6%
LESS ACCUMULATED DEPRECIATION		(124,288)			PROFESSIONAL MEETINGS	0	3,000	(3,000)	-100.0%
TOTAL PROPERTY & EQUIPMENT		s	29,070		DEPRECIATION EXPENSE	9,783	10,500	(717)	-6.8%
		Ş	23,070		DUES & SUBSCRIPTIONS	845	750	95	12.7%
TOTAL ASSETS			\$	2,586,858	OFFICE, PAYROLL SERVICES, & OTHER EXP	2,980	4,000	(1,020)	-25.5%
LIABILITIES AND FUND BALANCES:					UNFORSEEABLE EXPENSES	0	25,000	(25,000)	-100.0% -100.0%
					HUMAN RESOURCES EXPENSE LEGAL & ACCOUNTING	12,316	2,000 18,000	(2,000) (5,684)	-100.0%
ACCOUNTS PAYABLE	\$	16,906			DISCOUNT ON RETIREMENT LIABILITY	0	10,000	(0,004)	01.070
EMPLOYEE WITHHOLDINGS		0 9.973			POSTAGE EXPENSE	16,707	35,000	(18,293)	-52.3%
ACCRUED PAYROLL					PRINTING & SUPPLIES	19,407	30,000	(10,593)	-35.3%
TOTAL CURRENT LIABILITIES	\$	26,879			TOTAL OFFICE OPERATIONS EXPENSE	345,591	602,400	(256,809)	-42.6%
DEFERRED REVENUE-MISC RETIREMENT INSURANCE LIABILITY RETIREMENT INSURANCE DISCOUNT UNEARNED MEMBER DUES UNEARNED LIFE MEMBER DUES LIFE MEMBER-INSTALLMENTS DUE		9,167 116,222 (31,554) 127,190 233,825 51,072			PROGRAM EXPENSES: INVESTMENT MANAGEMENT FEES-TOTAL GRANTS TO FOUNDATION LEGISLATIVE EXPENSE LOBBYING SERVICES MARKETING EXPENSE	12,968 0 16,479 26,000 52,768	17,500 12,000 40,000 25,000	(4,532) 4,479 (14,000) 27,768	-25.9% 37.3% -35.0% 111.1%
TOTAL OTHER LIABILITIES	\$	505,923			REPRESENTATIVE ASSEMBLY FALL AREA WORKSHOPS	(200) 9,485	14,500 15,000	(14,700) (5,515)	-101.4% -36.8%
	Ψ	-			SPRING COMMITTEE WORKSHOPS	617	5.000	(4,383)	-87.7%
TOTAL LIABILITIES		\$	532,802		SUMMER LOC OFFICERS WS/OTHER COM.	1,561	5,000	(3,439)	-68.8%
FUND BALANCES:					FLORIDA MEETINGS	6,607	5,000	1,607	32.1%
FUND BALANCE	\$	1,554,710			PRESIDENT'S EXPENSES	1,832 24,035	8,000 30,000	(6,168) (5,965)	-77.1% -19.9%
	•				BOARD OFFICERS REIMBURSEMENTS QUARTERLY NEWSLETTERS	19,285	32,000	(12,715)	-39.7%
UNRESTRICTED NET ASSETS-BD DESIGNATED	\$	219,787			LOCAL CHAPTER DEVELOPMENT	0	2,000	(2,000)	-100.0%
GENERAL FUND		. \$	1,774,497	*	TOTAL OTHER	171,436	211,000	(39,564)	-18.8%
NET INCOME (LOSS)		\$	279,559		TOTAL EXPENSES	517,027	813,400	(296,373)	-36.4%
TOTAL LIABILITIES & FUND BALANCES			\$	2,586,858	EXCESS OF INCOME OVER EXPENSES	279,559	10,600	268,959	

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Web site	www.in.gov/inprs

Association Member Benefits Advisors (AMBA)

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	Scholarship Fund
	A Hand Up Fund
I	Active Teacher Grants
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