



*Advocating for all Indiana
Retired Educators*

BULLETIN BOARD

FALL 2021

IRTA RECONNECTING WORKSHOPS



With Great Regret...

IRTA Reconnecting Workshops are Cancelled. The cancellations include the following in-person workshops scheduled for:

- September 21 (Spring Mill State Park)
- September 22 (Primo in Indianapolis)
- September 23 (Swan Lake Resort in Plymouth)

On August 18, 2021, the IRTA Board of Directors voted to cancel all Reconnecting Workshops due to the uncertainty surrounding the COVID-19 Delta Variant conditions. It was a difficult decision. The Board is now working on plans for an alternative format for the Reconnecting Workshops.

We will send updated information as more develops.

Inside this Issue...

Golden Hoosier Award Winner

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Special Holiday Issue Submissions!

In the 2020 Winter issue of the Bulletin Board, we featured user submitted stories, recipes, and holiday greetings and it was a big hit. To be featured in the 2021 Winter issue, send submissions to dirofcomm@retiredteachers.org



From the President's Desk

By Paula Dyer

person" with masks and some Board members joined us via Zoom.

The IRTA Executive Committee and Board of Directors are very sad we had to make this decision. We were looking forward to reconnecting with members and enjoying a day of information, celebration and fun.

The IRTA Board is concerned of how cancelling another "in person" event will affect our membership. It is difficult to communicate our enthusiasm for the purpose of our organization though the written word. But be assured, our members are why we exist; to work and advocate for you.

I believe our members see the value of IRTA and will support our organization. Please continue to promote IRTA and urge others to join, not only your local groups but also the state organization.

I also assure you that as soon as the Board meeting adjourned, we began working on considering alternative ways to share the information we were compiling to present at the Reconnecting Workshops. The local presidents should be receiving by mail an updated copy of the Leadership Handbook. We will keep you posted and notify our members when we have finalized plans for our "alternative" Reconnecting Workshop.

At the August 18th IRTA Board meeting we made the difficult decision to cancel the "in person" Reconnecting Workshops that were to be held in September, 2021. The Executive Committee and Board of Directors considered the information and the predictions that were available when coming to this decision. I must note that our Board meeting on the 18th was a hybrid meeting, as we met "in

It is with great excitement we recognize one of our own. Linda Morris, IRTA Area 6 Director, is a recipient of the 2021 Golden Hoosier Award. Sponsored by Indiana Lieutenant Governor Suzanne Crouch and the Indiana Family and Social Services Administration, the Golden Hoosier Award recognizes seniors for their outstanding contributions to their community. A virtual ceremony to present this award will take place on September 15, 2021.

With an unwavering passion for improving her community, Linda has generously dedicated her time to serving others through many volunteer and leadership roles. Linda's legacy with the Indiana Retired Teachers Association and Foundation includes her time as Foundation Vice-President (2014) Foundation President (2015-2020),

One of IRTA's Own Golden Hoosier Award

By Josie Zavada

Randolph County RTA Secretary (current), and co-chair of Member Concerns/Necrology Committee (2021-2022).

Linda's accomplishments stretch far beyond her duties in the RTAs. As a Director/co-founder of the Main Street Senior Center, Randolph County, Linda has helped the center host a variety of programs for seniors to socialize, participate in activities, and stay active. She is Board President of the Historic Farmland USA and active member of LifeStream Advisory Council.

IRTA is proud to have members like



Linda, who not only contribute to the successes of our organization, but make us stand out in our communities by giving back and volunteering. We hope that the next time you see Linda, you congratulate her on this prestigious award.

The Bulletin Board
Indiana Retired
Teachers Association

2629 Waterfront Pkwy East
Drive, Suite 105

Indianapolis, Indiana 46214

Phone: (317)637.7481

Toll-Free (888)454.9333

info@retiredteachers.org

retiredteachers.org

Facebook: @INretiredteacher

Executive Director:

Laura Penman

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Dr. Gene Van Stone Area 9

Mark Guard Area 10

From the Desk of the Executive Director

By Laura Penman

Did you know that Harvey Ball is the father of the smiley face! Back in the 1960's, he created the happy smiley face for a local insurance company to cheer up the employees and remind them to smile as they worked with customers! I came across an article recently that discussed the 19 different types of smiles that exist, with only six of those smiles occurring when we are happy! It made me realize how much I rely on expressions when speaking to others. Unfortunately, with many of us going back to wearing a mask, we are missing these expressions in others. I want you to know that I am still smiling behind my mask! I have over 18,000 reasons to smile - it is YOU - all the members of the Indiana Retired Teachers Association! Representing you gives me reason to smile!

I could not have been prouder to represent you at the recent Association of State Retired Teacher Executives (ASRTE) Conference in Chicago. Paula Dyer and I attended the conference held the first week of August. What I found while attending the ASRTE Conference is that WE ARE NOT ALONE with our struggles. Other states are also challenged by Legislative decisions, decreasing membership, and finding members to fill leadership positions. In addition to the wonderful networking opportunities with other state executives, we were given ideas for advocacy and plans to

help members connect with legislators. We discussed ways to increase membership and involvement in the organization. The timing could not be better, given the difficult decision to find other ways to convey information instead of meeting in person in September.

We are currently looking at virtual platforms and using social media to stay connected with all of our members. I would like to share information virtually with members monthly, starting this fall. To make these presentations more meaningful, I need to know what topics you would like to hear discussed. Please email me at lpenman@retiredteachers.org or call me with ideas you think would benefit our members.

Thank you for your continued support. Never hesitate to call me with ideas or concerns or if you need assistance.





As a new membership year begins, please be the voice of the IRTA in your area. Since the in-person or face-to-face version of the Reconnecting Workshops have been cancelled for 2021, it is more important than ever that all IRTA members work to grow our membership. There is SO MUCH potential for growth, but it won't happen if we don't work together to make it happen. State membership enrollment forms are available from the state office (888-454-9333) or from your Area Director. Individuals may also join IRTA by visiting our website: www.retiredteachers.org (credit card or bank draft options available).

Also, remember that you can be eligible for periodic gift card prizes when you enroll new IRTA members. See the School Bell Award and Membership contest article in this edition of the Bulletin Board for more information.

- David Lennon

Be Involved! Be Counted! Be a Member of IRTA!

By David Lennon

Ideas to Grow our IRTA Membership

The IRTA is always looking for ways to maintain current members as well as recruiting new members. The state membership committee met recently, and we developed a list of some viable approaches that a local might use in order to recruit new local (and state) members. Keep in mind that this list is only a starting point – we hope these ideas prove to be beneficial!

- Make prospective members feel important --- include all school personnel (nurses, cooks, paraprofessionals)
- Don't take age into consideration – remember that associate members can be any age!
- Build a club web site
- Use group email / text to promote your club
- Make it FUN
- Interview a current teacher, then publish the interview
- Repeatedly invite prospective members --- remember, “just keep after them” -- Bud King
- Have members of your local RTA do a local “work day” with current staff – build goodwill!
- Prepare and present gifts for 1st time attendees at a local meeting
- Make personal contact with prospective members. Call them, or visit them in person! – “Just keep after them” – Bud King
- Prepare treat bags for all staff at one building (or corporation) as your group service project. Include some membership forms!
- Mentor with active teachers to explain how IRTA works (and doing things to help them in the classroom)
- When possible, visit the schools. Ask to speak briefly at faculty / staff meeting (contact district HR or Supt.)
- Mail letters – with membership form included – to current retirees that are not members of IRTA. Follow up with a phone call. Remember – “just keep after them”. – Bud King
- Hold a “Not Back to School” lunch to celebrate the retired life!
- Host a Retirement Workshop in your county

**Why
the
M&Ms?**



More Members!
Membership Matters!

BUD KING – Membership 101
“Just Keep After Them”

2021-2022 School Bell Award & Membership Contest

The rules to participate are simple. Sign up NEW Members!

Recieve credit for both regular and associate members. Regular memberships are for any retired educator receiving a pension from the Indiana State Teachers Retirement Fund, associate memberships are for anyone else: friends, family, active teachers. Also eligible will be regular or associate members that rejoin after a lapse in membership of at least one year. Members of the IRTA Board of Directors are not eligible to participate.

Don't Forget! Encourage new members to sign up for automatic renewal via dues deduction or credit card charge.

Receiving Credit: On paper applications: Put your name in the lower right hand corner next to where they indicate county of residence.

Online applications: Put your name in the notes section of the form.

Drawings will be held at the end of August, September, October, December, and March! You can be eligible for each drawing!

**\$500
GRAND
PRIZE**

PRESENTED AS A GIFT CARD
COURTESY OF AMBA

SIGN UP 1 -2 MEMBERS

For a chance to win a

\$25

GIFT CARD

SIGN UP 3 + MEMBERS

For a chance to win a

\$50

GIFT CARD



Foundation News

By Jeff Zook

Our IRTA Board had a tough decision to make in canceling the September in person RECONNECT Meetings. IRTA is exploring other options for

meeting safely. While we were excited about meeting in person again the risk for us retirees is just too great at this time. We appreciate their courage in making the decision. Next time we can renew those old friendships and build new friendships.

The Active Teacher Grant applications can be submitted now through September 30, 2021. As a reminder this year IRTF/IRTA will award 40 Active Teacher Grants totaling \$20,000. If you need information to distribute to current teachers about the Active Teacher Grants

the information is on the IRTA/IRTF website and can be mailed to you from the IRTA office.

IRTF's goal is to increase the Scholarship, Active Teacher Grants and A Hand UP awards. To increase those grants IRTF looks to the membership for contributions. We ask each of you to consider making contributions to IRTF prior to December 31, 2021. Contributions to IRTF are tax deductible. IRTF donations through IRA Required Minimum Distributions are always accepted too. Contributions can be made through the IRTA/IRTF website by credit card.

A direct link for donations can be found at the website noted here. <https://www.retiredteachers.org/index.php/foundation/give-now> The Active Teacher

Grant application can be viewed and printed at <https://www.retiredteachers.org/index.php/foundation/11030>

IRTF printed brochures with donation information is also available from the IRTA office. We are requesting you distribute copies at local meetings.

Have a pleasant Fall and be safe in your health practices. Remember to support IRTF/IRTA programs.



TIME TO EXPAND YOUR COVERAGE.

As your life changes, consider some of these benefits and discounts from **IRTA & AMBA**

- Dental & Vision Plans
- Long Term Care & Home Health Care Insurance
- Medical Air Services Association (MASA)
- Cancer, Heart & Stroke, and Accident Insurances
- Medicare Solutions
- Final Expenses Whole Life & Guaranteed Acceptance Life Insurance
- Annuity
- American Hearing Benefits (AHB)
- Hospital Stay Coverage
- Discounts on Travel, Dining & more

Learn More: **1-877-556-4582**

myambabenefits.info/inrta

INRTA - Indiana Retired Teachers Association



INDIANA RETIRED TEACHERS ASSOCIATION

BALANCE SHEET

AS OF 6/30/21

| | |
|----------------------------------------------|---------------------|
| CURRENT ASSETS: | |
| CASH | \$ 125,039 |
| INVESTMENT INCOME RECEIVABLE | 0 |
| PREPAID EXPENSES | 21,508 |
| RETURNED CHECKS | 0 |
| ACCOUNTS RECEIVABLE-LIFE ACCTS | 5,605 |
| ACCOUNTS RECEIVABLE-OTHER | 1,333 |
| TOTAL CURRENT ASSETS | \$ 153,484 |
| INVESTMENTS: | |
| INVESTMENTS-MSSB-PR MED | \$ 200,236 |
| INVESTMENTS-MSSB-CD | 267,450 |
| INVESTMENTS-MSSB-CORP | 2,827,519 |
| TOTAL INVESTMENTS | \$ 3,295,205 |
| PROPERTY AND EQUIPMENT: | |
| FIX ASSETS | \$ 101,302 |
| LEASEHOLD IMPROVEMENTS | 2,292 |
| LESS ACCUMULATED DEPRECIATION | (71,796) |
| TOTAL PROPERTY & EQUIPMENT | \$ 31,798 |
| TOTAL ASSETS | \$ 4,580,487 |
| LIABILITIES AND FUND BALANCES: | |
| ACCOUNTS PAYABLE | \$ 9,037 |
| ACCRUED RENT | 13,002 |
| EMPLOYEE WITHHOLDINGS | 0 |
| ACCRUED PAYROLL | 8,001 |
| TOTAL CURRENT LIABILITIES | \$ 30,040 |
| DEFERRED REVENUE-MISC | 0 |
| RETIREMENT INSURANCE LIABILITY | 88,000 |
| RETIREMENT INSURANCE DISCOUNT | (24,717) |
| UNEARNED MEMBER DUES | 196,567 |
| UNEARNED LIFE MEMBER DUES | 117,376 |
| LIFE MEMBER-INSTALLMENTS DUE | 5,909 |
| TOTAL OTHER LIABILITIES | \$ 383,135 |
| TOTAL LIABILITIES | \$ 413,175 |
| FUND BALANCES: | |
| FUND BALANCE | \$ 2,135,792 |
| UNRESTRICTED NET ASSETS-BD DESIGNATED | \$ 189,497 |
| GENERAL FUND | \$ 2,325,289 |
| NET INCOME (LOSS) | \$ 742,023 |
| TOTAL LIABILITIES & FUND BALANCES | \$ 4,580,487 |

INDIANA RETIRED TEACHERS ASSOCIATION

VARIANCE REPORT

TWELVE MONTH PERIOD ENDED 6/30/21

| | Amount | Amount |
|----------------------------------------|------------------|----------------|
| INCOME: | | |
| REGULAR MEMBER DUES | 585,380 | 655,000 |
| ASSOCIATE MEMBER DUES | 31,686 | 34,000 |
| GAIN/(LOSS) ON SALE-SECURITIES | | |
| TCU INTEREST-ASSOCIATION | 196 | |
| INVESTMENT INCOME-TOTAL | 740,088 | 55,000 |
| ROYALTY ENDORSEMENT FEE | 71,735 | 73,000 |
| FLORIDA MEETINGS INCOME | | 1,300 |
| REPRESENTATIVE ASSEMBLY INCOME | | 5500 |
| MISCELLANEOUS INCOME | 191 | |
| OTHER INCOME-CREDIT CARD | | |
| SALE OF IRTA MERCHANDISE | | |
| TOTAL INCOME | 1,429,277 | 823,800 |
| OFFICE OPERATIONS: | | |
| OCCUPANCY-RENT | 57,420 | 56,000 |
| INFORMATION TECHNOLOGY & MAINT. | 27,895 | 30,000 |
| STAFF TRAVEL, PARKING & MEALS | 1,992 | 4,000 |
| SALARIES-OFFICE STAFF | 235,577 | 270,000 |
| PAYROLL TAXES & RETIREMENT EXPENSE | 23,027 | 30,000 |
| GROUP INSURANCE | 57,187 | 65,000 |
| OTHER INSURANCE | 6,622 | 3,100 |
| PROFESSIONAL MEETINGS | 0 | 0 |
| DUES & SUBSCRIPTIONS | 180 | 1,000 |
| OFFICE, PAYROLL SERVICES, & OTHER EXP | 4,747 | 3,500 |
| UNFORSEEABLE EXPENSES | 22 | 10,000 |
| POSTAGE EXPENSE | 21,095 | 26,000 |
| PRINTING & SUPPLIES | 18,317 | 25,000 |
| LEGAL & ACCOUNTING | 12,622 | 13,500 |
| DEPRECIATION EXPENSE | 14,341 | 8,000 |
| DISCOUNT ON RETIREMENT LIABILITY | 0 | |
| TOTAL OFFICE OPERATIONS EXPENSE | 481,043 | 545,100 |
| PROGRAM EXPENSES: | | |
| MARKETING EXPENSE | 32,719 | 60,000 |
| INVESTMENT MANAGEMENT FEES-TOTAL | 26,953 | 25,000 |
| CONTRIBUTIONS TO THE FOUNDATION | 45,036 | |
| REPRESENTATIVE ASSEMBLY | 6,846 | 21,000 |
| LEADERSHIP CONF/FALL AREA WORKSHOPS | 0 | 10,000 |
| ALL COMMITTEE WORKSHOPS | 0 | 5,000 |
| SUMMER LEADERSHIP WORKSHOP | 0 | |
| COMMITTEE MEETING/OTHER | 0 | |
| FLORIDA MEETINGS | 0 | 6,000 |
| PRESIDENT'S EXPENSES | 893 | 8,000 |

Postmaster:

Send address changes to:

Indiana Retired Teachers Association
2629 Waterfront Pkwy East Dr., Ste. 105
Indianapolis, IN 46214

**Foundation
Donation Form**

I am enclosing a \$ _____
endowment contribution to assist the
Foundation with its important work.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Name on apple if above \$250: _____

Please make check payable to:
Indiana Retired Teachers Foundation
2629 Waterfront Pkwy East Dr., Suite 105
Indianapolis, Indiana 46214




To make a program specific donation, please visit retiredteachers.org. The Indiana Retired Teachers Foundation is recognized by the IRS as a 501(c)(3) organization. Gifts are tax-deductible to the extent allowed by law.

Active Teacher Grants Deadline Approaching


The deadline for Active Teacher Grant Submissions is approaching. All applications should be fully completed and submitted no later than end of day September 30, 2021. For full information on this program or to donate, please visit retiredteachers.org/foundation.

2021 ACTIVE TEACHER GRANTS

RETIREDTEACHERS.ORG



Indiana Retired Teachers Foundation grants provide additional funds to Indiana public school educators (Pre-K through 12). Supplying their students with the opportunity to participate in special projects.



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POSTMASTER:

Send address changes to The Bulletin Board
Indiana Retired Teachers Association
2629 Waterfront Parkway East Drive, Suite 105
Indianapolis, IN 46214