

*Advocating for all Indiana
Retired Educators*

BULLETIN BOARD

SPRING 2021

Inside this Issue...

NEW Executive Director

A Message from Paula Jones

NEW AMBA RVP

Where Do we Stand with the Legislature?

Support for the 13th Check

Working with a *NEW* Team

Thank You from Jane Boultinghouse

Giving, Helping, Serving - IRTF

Mid-Year Financial Report

The Representative Assembly

IRTA Appointments and Nominations

From the President's Desk



This will be my last article as President of IRTA. It is hard to believe that it has been two years since I took office. Many things have happened during that time.

Most of all, IRTA has become stronger and more resilient, as we constantly continue to advocate for you, Indiana's Retired Educators.

As we are exiting from the lonely, dark, COVID winter, we are starting to see the freshness and newness of spring! It is so exciting to have the warmth from the sun, watch the trees leaf out and the flowers pop up! We hope we can soon be out and active in our local IRTA meetings, seeing our friends, volunteering, and making a difference in our wonderful state of Indiana. I am excited that the prospects of being able to meet in person once again may be right around the corner. I thank each of you that were able to volunteer your time to continue helping our fellow retirees, active teachers, and students.

I am reminded of a little story written by Becky Wagoner that I read and would like to paraphrase it for you.

Continued....Page 2

"The IRTA has brought me a support system and friendships which have brightened my days and warmed my heart..."



From the President’s Desk *continued*

Years ago, a tree was planted in a back yard next to a sandbox which helped to shade little ones as they played. In time, the tree continued to grow but the sandbox was replaced by cars as teenagers parked near the tree for shade.

The tree continued to grow and offered shade while grandbabies played for hours on the swings.

Just a couple years ago some branches were starting to die, and it was looking bad, but not bad enough for the tree service to cut it down. They trimmed the tree way back, but it was still able to provide some shade and house bird nests for a few more years.

That tree represents us. We were young and grew up to become adults. We sheltered our family and helped to nurture them through good times and bad. We are still excited to welcome our little “birds” back to our nest. Our limbs do not have as much strength as they once did, and we are no longer pretty. But, just like that tree, we are here and alive. We use what strength, energy, and abilities we have left to continue to serve as best we can and impact others.

This little story illustrates what each of us has experienced. We continue to serve in our communities and strive to better our lives for each other. We need to realize that just because we have reached

the “senior citizen” status, does not mean that we are done. We have a lot of wisdom, patience, and common sense to share.

Thank you for allowing me to serve as your IRTA President during the past two years. I will miss seeing your smiling faces. I plan to continue serving IRTA however I can.

I want to leave each of you with the following thought that I always like to share. If you don’t know where you are going, you will never know when you get there!

Have a great Spring.

Barry

A Message, from Paula Jones

As I have resigned from the President-Elect position due to health concerns, I wanted to take the opportunity to reflect on my time and involvement with the Indiana Retired Teachers Association (IRTA). After retiring in the spring of 2009, the opportunity to stay connected with fellow educators within the local Greene County IRTA became a treasured activity. It provided me with a way to give back to my community and service education in a different yet still impactful capacity. Serving on the IRTA board as the Area 8 Director, I began to build more friendships and learn more of the great work teachers were doing throughout my region. These experiences continued to expand as I next served on the board as secretary/treasurer and most recently as president-elect. The IRTA has brought me a support system and friendships which have brightened my days and warmed my heart through various health challenges during the recent years.

I am not only proud to be a retired teacher myself but if you know me, you know I am also proud of the educators in my family. My husband, Keith, is a retired educator from Clay Community Schools. I guess you could say we passed our love of teaching on to our two children as they are also educators. Our son, Christopher, works for North Gibson School Corporation. Our daughter, Tricia Hall, and her husband, Aaron, work for North Knox School Corporation. IRTA not only allowed me to advocate for current retired educators but also for future retired educators. I am thankful for the work we have done and will continue



to do for this respected and vital profession.

IRTA in many ways has embraced both me and my family. As I have traveled and attended various meetings, my husband became my chauffeur. Being a part of the IRTA reminds me of being a part of a school faculty. Rarely did we meet without discussing family and reviewing current life updates. For some retirement can bring a season of longing and loneliness, but for me it brought me a new season of expanded friendships and family.

Thank you to the IRTA membership, board and staff for your continued friendship and support. I pray you stay well and continue to conduct the blessed work of education for many years to come.

NEW Executive Director

Laura Penman comes to IRTA from Eminence Community School Corporation in Eminence, Indiana, where she was Superintendent from 2017-2021. Prior to Eminence, Laura was a Principal for Spencer-Owen Community Schools (2013-2016) and Plainfield Community School Corporation (2002-2013). She was an Administrative Assistant, Title I Building Coordinator, and elementary teacher for Clay Community Schools.

Laura earned her Ed. S. from Indiana State University Department of Education Leadership in 2012. She completed the Principal Internship Program through the Department of Educational Leadership Administration and Foundations at Indiana State University, earned

a Master of Education and a Bachelor of Science in Elementary Education from Indiana State University.

As an educator, she has been given many opportunities to work with children of all ages – from preschool to high school seniors. She feels blessed to have worked in four school corporations alongside incredible administrators, teachers and support staff!

Laura and her husband, Steve, enjoy spending time on the water. They especially enjoy spending time on Kentucky Lake and Lake Barkley and traveling the Cumberland River to Nashville on their boat. She is incredibly proud of her daughter, Brogyn, and future son-in-law, Dan, who live in Charlotte, NC.

She could not have imagined when she started teaching 2nd graders in Clay County in 1984 – the incredible direc-



tion her life would take! After having been in public education for 37 years, she is excited to have been offered an opportunity to represent educators – past and present – all over Indiana as the Executive Director of IRTA.



Welcome AMBA’s Jim Colvin

The IRTA would like to announce Jim Colvin as the new Regional Vice President of our benefits partner AMBA, replacing Sudi Naraine who served in this position for over 14 years. Sudi is still with AMBA, moving to Arizona to help with the west coast expansion states

who are new to the group. Jim served as a district manager since 2011 and has been a company trainer for Medicare and other benefits.

We welcome Jim and look forward to our future of working toward increased benefits, community partnership and relevance in this ever-changing world.

A Message from Jim

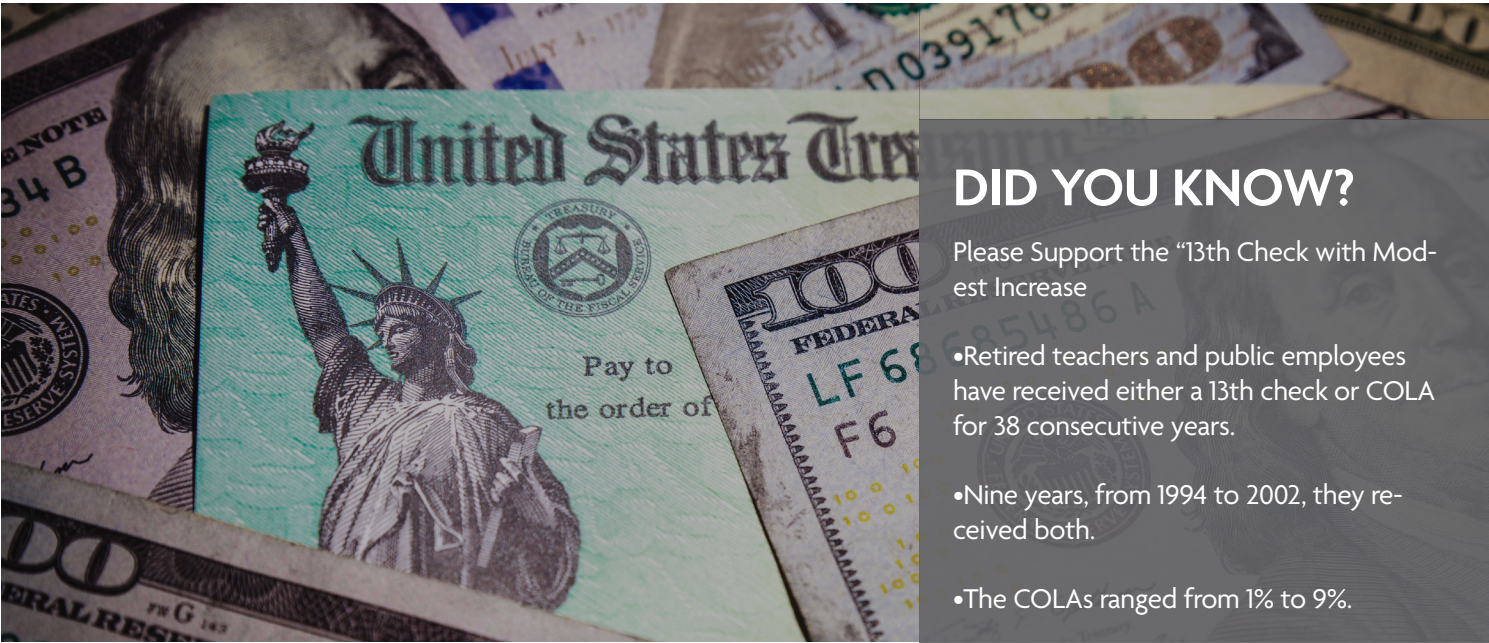
“I am happy to step into the role of RVP at AMBA! I am a Hoosier and grew up in Hamilton county, graduated from Hamilton Southeastern High School (back when it was small!) and attended Purdue for engineering, and then IU for marketing. I like to cover my bases! I am married to Amie and we have 3 children, one in college and 2 in high school. Amie’s mother is a retired teacher from Noblesville and she has always given me a personal perspective

of the life of a teacher, and now retired teacher. This has certainly helped in my career here at AMBA as I see first-hand the challenges, demands and rewards of a teacher, both in the school and retirement. I am excited to continue to strengthen the partnership between the IRTA and AMBA, along with working closely with the board and executive leadership to increase membership efforts and add value to AMBA’s role as benefit advisors.

When I’m not working, I enjoy family outings, golf, music and creative building projects. I’ve been an active member of my community and church by volunteering in local opportunities like Kids Against Hunger, various leadership groups and local community outreach.”

Editor’s Note

The Bulletin Board has received a positive response to the user submissions in our Winter Issue. Please continue to send your submissions to dirofcomm@retiredteachers.org. We look forward to including more of your content in our upcoming issues!



Where Do we Stand with the Legislature? – 13th Check

We know our members are anxious to hear what is happening in the Legislature regarding the 13th check. Many of you answered our request to email your representative in February, and the bill, HB 1227, passed in the Labor and Pensions Committee 11-0. On third reading in the House, the bill passed 92-1.

At that point, the real battle comes to the Senate. Our lobbyist, Steve Beebe, has been talking, emailing, and phoning senators to ensure that they become aware of our bill. He has put together a short page of talking points that you will see in this newsletter. We are also asking each of you to email your senator, asking them to support the 13th check. We will be contacting members over five different weeks so that as you receive the email asking for help, senators will be hearing from our members over and over through the rest of the session. Please follow the request of the email when you receive it.

The appropriation for the 13th check is in the budget and our challenge will be to make sure it remains in the budget, hence the need for the continuous stream of emails.

Many of you are asking, “What about a COLA?” We met in the winter with the lobbyist and executive director of PERF, the public employee association. We decided that this would not be a good year to ask for more than a 13th check when many Hoosiers are out of work, worrying about rent and food, and having to school their children at home.

Meanwhile, we need to say that as we look at our oldest retirees, many of whom get less than \$1000 in monthly pensions, the 13th check is more help to them than a COLA of 1% might be over several years. I hope that you can understand the dichotomy that this poses for your Legislative team.

We won’t know until the very end of the Legislative session whether our 13th check will be left in the coming biennial budget. Your emails will help make that possible so thank you for your support.

-Nancy Tolson,

Chair of the Legislative Committee

DID YOU KNOW?

Please Support the “13th Check with Mod-est Increase

- Retired teachers and public employees have received either a 13th check or COLA for 38 consecutive years.

- Nine years, from 1994 to 2002, they received both.

- The COLAs ranged from 1% to 9%.

- Approximately 9,000 retired teachers receive a monthly benefit of \$1000 or less. Approximately 3000 receive \$500 or less per month.

- Many retired teachers rely on the 13th check to help pay for living expenses such as medication or winter utility bills.

- To deny a 13th check after 38 consecutive years receiving an enhanced benefit would equate to a significant cut in benefits.

- Private sector jobs generally pay more than public sector jobs and therefore public sector pensions tend to be less. The lower monthly benefit amount justifies the allocation of the 13th check.

- HB 1227 which authorizes the 13th check with a \$50 increase, passed the Employment, Labor and Pensions Committee 11 – 0, the Ways & Means Committee 24 – 0 and 3rd reading by a vote of 92 – 1.

- Funding for the base 13th check for both years of the biennium is included in HB 1001. HB 1227 uses funds from the Supplemental Reserve Account to pay for the \$50 increase. The balance in the SRA is more than sufficient to pay for the increase this year and every year moving forward.

Retired teachers and public employees worked hard to earn a secure retirement. Please help them achieve that goal by supporting the 13th check.

Working With a New Team

Every career move or change in position requires learning to work with a new team. I feel blessed in accepting the position of Executive Director for IRTA because I will be working with a new team of potentially 58,000 retired educators! Just imagine what we can accomplish joining together to protect what we have worked so hard for and giving back to the communities that provided us opportunities throughout our careers!

AND - if you know an educator that is making the decision to retire at the end of this school year - please invite them to join our incredible team! This is going to be a very exciting year with the ability to return to more personal meetings. We have several things to look forward to and I can’t wait to get started! Not only am I looking forward to representing you - I am one of you - I am an Indiana Retired Teacher!!!

As we start working together - I have included an activity that I have used with beginning teachers...

JUST SOMETHING TO THINK ABOUT...

Reflection on what is really important...

- Name the five wealthiest people in the world.
- Name the last five Heisman trophy winners.
- Name 10 people who have won the Nobel or Pulitzer Prize.
- Name the last dozen Academy Award winners for best actor or actress.
- Name the last decade’s worth of World Series winners.

How did you do?

The point is that none of us remembers all of the headlines of yesterday. The people on these lists are the best in their fields. And, yet... the applause dies... awards tarnish... and achievements are forgotten.

Now try...

- List a few teachers who aided your journey through school.
- Name three friends who have helped you through a difficult time.
- Think of a few people who have made you feel appreciated and special.
- Think of five people you enjoy spending time with.
- Name a half a dozen heroes whose stories have inspired you.

The lesson is... “The people who make the biggest difference in your life are not the ones with the most credentials, the most money or the most awards. They are simply the ones who care the most.” - Steve Gilliland and WAKE-UP CALLS Making the Most Out of Every Day by Joan Lunden.

I am excited to be working with my new team of caring educators! Please don’t hesitate to reach out to me. I am here to serve all of you! - Laura Penman



Thank You - Jane Boultinghouse

Where did the time go? When I was elected to serve as secretary and treasurer of IRTA eight years ago, I thought this was going to be a long-time commitment. I had a great great nephew, Harry, born that summer and I realized he would be in second grade by the time I served on the Board for eight years. The time has flown by my friends. I have loved getting to meet with some of you, being at your meetings, staying in homes with you

and sharing many meals with you. If someone ever asks, “Would you like to serve on the Board of Directors?”, I hope your answer will be yes! It will be a wonderful experience.

I know I will see many of you in the future at meetings and Representative Assembly. It seems like we haven’t had that opportunity in awhile. Stay safe, keep up your awesome volunteer work and keep asking our retired educators to join IRTA.

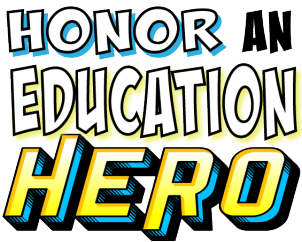
Hugs,
Jane Boultinghouse
Immediate Past State President

Giving, Helping, Serving

Indiana Retired Teachers Foundation “BE THE MATCH” Endowment building campaign ended on December 31, 2020. During the 18 months of Matching Funds IRTF received contributions of **over \$126,461.46**. Our Endowment total is now at \$505,847.99. We are over halfway to our goal of \$1,000,000!

This growth in the Endowment Fund is due to the generosity and financial support of our retired teachers. On behalf of the IRTF Board I thank you for your continued support of the IRTA/IRTF Scholarships, Active Teacher Grants and A Hand Up programs. Retired teachers are the community supporters and leaders in philanthropy.

IRTF continues to implement fundraising options to support for the IRTA/IRTF programs. Currently we are pushing out information on IRTA and IRTF through social media sites, publicity for Honor an Education Hero. The IRTA website and Facebook pages provide easy access for membership in IRTA, and for making contributions to IRTF. Check out our Hero Educator Flip Book of educators being honored at retiredteachers.org. Fun and heart warming stories of educators who have a special place in your heart. We appreciate all of your support for IRTF.



The Case of the Flying Muffin - By Carmen Palma

I am thankful for my new toaster. The old toaster had to be coaxed in order to move my daily English muffin upward far enough to be retrieved. Not so with the new one! It catapults the round pastry into the air. Sometimes it lands back in the toaster slots. Other times it cozies up to the neighboring mixer. If the cook is alert, it is occasionally possible to catch it mid-air. A recent guest was first startled, then amused, as she observed a sour dough muffin defying gravity for a split second as it ascended above the toaster before landing. I retrieved this morning's muffin leaning against a Kitchen Aid appliance. Thank you, shiny grey toaster, for this morning's entertainment.



BENEFITS STILL FIT?



Are you taking full advantage of the benefits & discounts available through **IRTA & AMBA**? Call now to schedule your free benefits checkup.

Learn more: 1-877-556-4582

myambabenefits.info/inrta

Indiana Retired Teachers Association



A Review of *The Green Ribbon Murder: . . .A Legend about a Farmer in the “Shadows of the Summer Solstice”*

Hey true crime fans! One of our very own IRTA members, Sharon Cowen, has a haunting book. The story takes place in 1872, in a little Hoosier town on Tama Rd. Go beyond the murder itself and into the minds of the community surrounding the tragic event. The author’s ability to capture the voice of each character is very interesting.

‘I’m sure they could smell the girl’s blood.’ “Yuh know, Tom, horses is prey animals with their eyes on the sides of their heads...we’s made like predators, eyes front and center. Since they’s prey not predator and can only see with one eye at a time, the unusual odor of bloods gets ‘em real skittish.

The book is available on Amazon, WalMart, Books-A-Million, and Barnes and Noble.

INDIANA RETIRED TEACHERS ASSOCIATION
BALANCE SHEET
AS OF 1/31/21

ASSETS:		As of 1/31/2021	
CURRENT ASSETS:			
CASH	\$	13,488	
INVESTMENT INCOME RECEIVABLE		0	
PREPAID EXPENSES		19,571	
RETURNED CHECKS		0	
ACCOUNTS RECEIVABLE-LIFE ACCTS		4,963	
ACCOUNTS RECEIVABLE-OTHER		488	
TOTAL CURRENT ASSETS			\$ 38,510
INVESTMENTS:			
INVESTMENTS-MSSB-PR MED	\$	185,279	
INVESTMENTS-MSSB-CD		427,433	
INVESTMENTS-MSSB-CORP		2,592,701	
TOTAL INVESTMENTS			\$ 3,205,413
PROPERTY AND EQUIPMENT:			
FIX ASSETS			
LEASEHOLD IMPROVEMENTS	\$	100,202	
LESS ACCUMULATED DEPRECIATION		(65,821)	
TOTAL PROPERTY & EQUIPMENT			\$ 36,673
TOTAL ASSETS			\$ 3,280,596
LIABILITIES AND FUND BALANCES:			
ACCOUNTS PAYABLE	\$	2,963	
ACCRUED RENT		13,002	
EMPLOYEE WITHHOLDINGS		0	
ACCRUED PAYROLL		7,862	
TOTAL CURRENT LIABILITIES			\$ 23,826
DEFERRED REVENUE-MISC		(5,833)	
RETIREMENT INSURANCE LIABILITY		88,000	
RETIREMENT INSURANCE DISCOUNT		(24,717)	
UNEARNED MEMBER DUES		46,872	
UNEARNED LIFE MEMBER DUES		131,730	
LIFE MEMBER-INSTALLMENTS DUE		5,267	
TOTAL OTHER LIABILITIES			\$ 241,319
TOTAL LIABILITIES			\$ 265,145
FUND BALANCES:			
FUND BALANCE	\$	2,135,792	
UNRESTRICTED NET ASSETS-BD DESIGNATED			\$ 2,325,289
GENERAL FUND			\$ 690,162
NET INCOME (LOSS)			\$ 3,280,596
TOTAL LIABILITIES & FUND BALANCES			\$ 3,280,596

INDIANA RETIRED TEACHERS ASSOCIATION
VARIANCE REPORT
SEVEN-MONTH PERIOD ENDED 1/31/21

	Year-to-date Amount	Amount	Budget-year-to-date Var-amt	Var-%
INCOME:				
REGULAR MEMBER DUES * Does not include Life Members	553,378	655,000	(101,622)	-15.5%
ASSOCIATE MEMBER DUES	31,610	34,000	(2,390)	-7.0%
GAIN/(LOSS) ON SALE-SECURITIES				
TCU INTEREST-ASSOCIATION	167	55,000	421,378	766.1%
INVESTMENT INCOME-TOTAL	476,378	73,000	(30,612)	-41.9%
ROYALTY ENDORSEMENT FEE	42,388	1,300		
FLORIDA MEETINGS INCOME		5500		
REPRESENTATIVE ASSEMBLY INCOME	61			
MISCELLANEOUS INCOME				
OTHER INCOME-CREDIT CARD				
SALE OF IRTA MERCHANDISE				
TOTAL INCOME	1,103,983	823,800	280,183	34.0%
OFFICE OPERATIONS:				
OCCUPANCY-RENT	33,572	56,000	(22,428)	-40.1%
INFORMATION TECHNOLOGY & MAINT.	16,913	30,000	(13,087)	-43.6%
STAFF TRAVEL. PARKING & MEALS	616	4,000	(3,384)	-84.6%
SALARIES-OFFICE STAFF	141,748	270,000	(128,252)	-47.5%
PAYROLL TAXES & RETIREMENT EXPENSE	12,261	30,000	(17,739)	-59.1%
GROUP INSURANCE	32,324	65,000	(32,676)	-50.3%
OTHER INSURANCE	3,019	3,100	(81)	-2.6%
PROFESSIONAL MEETINGS	0	0	0	
DUES & SUBSCRIPTIONS	180	1,000	(820)	-82.0%
OFFICE, PAYROLL SERVICES, & OTHER EXP	2,426	3,500	(1,074)	-30.7%
UNFORSEEABLE EXPENSES	27	10,000	(9,973)	-99.7%
POSTAGE EXPENSE	17,561	26,000	(8,439)	-32.5%
PRINTING & SUPPLIES	10,436	25,000	(14,564)	-58.3%
LEGAL & ACCOUNTING	11,728	13,500	(1,772)	-13.1%
DEPRECIATION EXPENSE	8,366	8,000	366	4.6%
DISCOUNT ON RETIREMENT LIABILITY	0			
TOTAL OFFICE OPERATIONS EXPENSE	291,175	545,100	(253,925)	-46.6%
PROGRAM EXPENSES:				
MARKETING EXPENSE	19,157	60,000	(40,843)	-68.1%
INVESTMENT MANAGEMENT FEES-TOTAL	14,986	25,000	(10,004)	-40.0%
CONTRIBUTIONS TO THE FOUNDATION	42,986			
REPRESENTATIVE ASSEMBLY	1,663	21,000	(19,337)	-92.1%
LEADERSHIP CONF/FALL AREA WORKSHOPS	0	10,000	(10,000)	-100.0%
ALL COMMITTEE WORKSHOPS	0	5,000	(5,000)	-100.0%
SUMMER LEADERSHIP WORKSHOP	0	0	0	#DIV/0!
COMMITTEE MEETING/OTHER	0	0	0	#DIV/0!
FLORIDA MEETINGS	0	6,000	(6,000)	-100.0%
PRESIDENT'S EXPENSES	599	8,000	(7,401)	-92.5%
BOARD OFFICERS REIMBURSEMENTS	2,706	34,000	(31,294)	-92.0%
QUARTERLY NEWSLETTERS	17,224	35,000	(17,776)	-50.8%
LEGISLATIVE EXPENSE	565	20,000	(19,435)	-97.2%
LOBBYING SERVICES	22,750	39,000	(16,250)	-41.7%
MERCHANDISE FOR SALE	0	15,000	(15,000)	-100.0%
UNDESIGNATED PROGRAM EXPENSES	0	500	(500)	-100.0%
LOCAL CHAPTER DEVELOPMENT				
TOTAL OTHER	122,646	278,500	(155,854)	-56.0%
TOTAL EXPENSES	413,821	823,500	(409,779)	-49.8%
EXCESS OF INCOME OVER EXPENSES	690,162	200	689,962	

Postmaster:

Send address changes to:

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

The Representative Assembly

The time-honored tradition of gathering in-person for the Representative Assembly was greatly missed in 2020. Like most organizations, IRTA has faced many challenges navigating the landscape of the ongoing global pandemic. While mail-in voting was not as rewarding as hosting an Indianapolis meeting, it was conducted safely and successfully.

As we prepare for a return to normalcy, the CDC recommends proceeding with caution a while longer. For this reason, the IRTA Board has decided to continue to conduct the 2021 business digitally and the voting for the Representative Assembly will also be conducted digitally.

Usual deadlines for committees to submit reports, for membership counts that determine the number of delegates to the RA and all other matters continue as planned.

IRTA Board looks forward to presenting the 2021 awards in-person later in the year, as well as, resuming in-person meetings when we feel it is safe to do so.



IRTA Appointments to Office

Due to the resignation of Paula Jones as President-Elect of the IRTA, President Barry Conrad has appointed the following changes:

- **President-Elect** -
- Paula Dyer
- **Secretary Treasurer** -
- David Lennon
- **Area 8 Director** -
- Beverly Logterman

Nominations Report

IRTA announces the following nominations.

- **President-Elect** - David Lennon
- **Secretary Treasurer** - Sharon Barns
- **Area 1** - Dennis Keithley
- **Area 3** - Charles Short
- **Area 5** - Sally Durfee
- **Area 7** - Marty Mullin
- **Area 9** - Gene Van Stone

The Bulletin Board (USPS 393-150) is the quarterly publication of the Indiana Retired Teachers Association. Subscription is available to members only and is included in membership dues at \$2 per subscription. Periodicals postage is paid at Indianapolis, Indiana.

POSTMASTER:

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