



Advocating for all Indiana Retired Educators

BULLETIN BOARD



WINTER 2024



Investing in Education Across a Lifetime:

Samantha King's Unprecedented Journey with IRTAF

At the Indiana Retired Teachers Association Foundation (IRTAF), we take immense pride in fostering a lifelong commitment to education, and Samantha King's extraordinary journey stands as a testament to this commitment. As the first recipient of both our scholarship in 2019 and the Active Teacher Grant in 2023, Samantha exemplifies the enduring support we provide to educators at every stage of their careers.

Samantha's story with the IRTA Foundation began with a scholarship during her time at Ball State University. Our schol-

arship program underscores our dedication to nurturing the next generation of educators, providing financial support to promising students like Samantha as they embark on their academic and teaching journeys.

In 2023, Samantha emerged as the first recipient to bridge the gap between student and active educator support, symbolizing the seamless continuum of assistance offered by our Foundation. The Active Teacher Grant, a cornerstone of our support system, enabled Samantha to expand the "Grow our Learning" project at Selma Elementary. Samantha's proposal sought to improve and expand the school garden, transforming it into a multi-sensory space for students from kindergarten to fifth grade, that provides fresh produce for school lunches.

The demographic landscape of the school includes 515 students from K-5, with an average class size of 22 students per teacher. Notably, 54 percent of students received free and reduced lunch and/or breakfast, highlighting the diverse needs within the community.

To initiate the project, Samantha's second-grade class planted the garden, starting with their own seeds in a simulated greenhouse environment created right in the classroom. The innovative use of a shower curtain and natural sunlight

through the windows provided a first-hand experience in plant cultivation and introduced students to the science of seed germination.

As the seeds sprouted and grew, students actively oversaw watering and ensured the plants' health. They problem-solved and developed solutions, contributing to a deeper understanding of the growth process. Samantha's class took responsibility for caring for the plants during the critical early stages, providing insights into plant biology and growth patterns.

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- Message from IRTA President
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From the Desk of the Executive Director

by *Laura Penman*



When the Indiana Retired Teachers Association (IRTA) achieves pension enhancements, it receives well-deserved praise. However, when it seems that IRTA has faced setbacks, some individuals are quick to find fault, and even step away from the Association. This is where my frustration lies. It is during these challenging moments that I turn to the following words, given to me on a laminated card by a colleague back in 2004

Man in the Arena

President Theodore Roosevelt

“Citizenship in a Republic” Speech at the Sorbonne, Paris, April, 1910

“It is not the critic who counts: not the man who points out how the strong man stumbles or where the doer of deeds could have done better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood, who strives valiantly, who errs and comes up short again and again, because there is no effort without error or shortcoming, but who knows the great enthusiasm, the great devotions, who spends himself for a worthy cause; who, at the best, knows, in the end, the triumph of high achievement, and who, at the worst, if he fails, at least he fails while daring greatly, so that his place shall never be with those cold and timid souls who knew neither victory nor defeat.”

These words spoken so very long ago speak to many situations, but for me, it is a reminder that when others are critical, I must not lose heart. IRTA fights for a worthy cause. We fight for you and we fight because of you! Your \$35 annual dues goes a long way in keeping us in the arena. Your annual dues provide IRTA with a skilled lobbyist. Your annual dues allow IRTA to have a physical location with a small staff working hard each and every day for Indiana retired educators. Your annual dues fund educational workshops for members, virtual experiences, and resources. Your annual dues keep the communication strong and guarantees IRTA’s message is heard! There are additional benefits that go beyond the annual dues. Members have the benefit of volunteers from all over the state giving their time and dedication to support IRTA’s mission and vision.

In keeping with IRTA’s legislative goals, members were asked in November to reach out to local legislators asking for the allocation of funds during the 2024 Legislative short session to provide a 13th check. It is not too late for you to take part in this grassroots approach!

IRTA will also be working diligently during 2024 to secure an annual enhancement in 2025 that will have advantageous long-term effects. Make sure you stay updated on our efforts by following IRTA on Facebook and periodically checking our website at www.retiredteachers.org. Let us make 2024 the year that we are all in the arena together.

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CONTINUED FROM PG. 1

Once the last frost of spring passed, the students transitioned to the outdoor garden. Days were spent preparing the soil, removing weeds and debris, and enriching the area with nutrients. This hands-on activity taught students essential skills such as differentiating between weeds

and plants, understanding the importance of soil health, and the overall process of preparing a garden for cultivation.

Throughout the school year, Samantha’s class monitored each plant’s progress, ensuring their survival by tending to their needs. The garden was initially planted by the second graders in early May, cared for by the summer program children, and finally harvested by King’s new second-grade class in August.

The goal of the Active Teacher Grant money is to create additional garden boxes, increase the variety of vegetables grown, and produce informational cards for each type of vegetable cultivated. These cards served not only as educational tools for Samantha’s class but were also shared with other classes within the school, fostering a sense of community engagement and knowledge-sharing.

The “Grow our Learning” project transcended traditional classroom teaching, instilling a love for nature and agriculture while providing valuable life skills.

As we celebrate Samantha’s remarkable achievements, her dedication echoes our vision at IRTAF, a vision that extends beyond the classroom, nurturing a generation of students who are not only academically enriched but also equipped with the skills and passion to contribute meaningfully to the world around them.

Samantha’s journey is a shining example of the transformative power of hands-on education, and we remain committed to supporting educators like her in their pursuit of excellence. With each success story, we reaffirm our belief in the profound impact education can have on individuals and communities, looking forward to continuing our mission of fostering lifelong learning and empowerment.

To discover more about the initiatives of the Indiana Retired Teachers Association Foundation, including our Active Teacher Grant Program and Scholarships, please visit retiredteachers.org/foundation.

The Bulletin Board

Indiana Retired Teachers Association

2629 Waterfront Pkwy East Drive,
Suite 105 Indianapolis, Indiana
46214

Phone: (888)454.9333

info@retiredteachers.org

retiredteachers.org

Facebook: @INretiredteacher

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From the President's Desk

by David Lennen



Happy New Year! It seems strange to say this since today is December 15, 2023. I hope you had a holiday full of your favorite things, whatever form that may take. For me, that means time in the kitchen making candy and cookies for family and friends. It can be tiring, but it does bring me joy – as well as memories from my “younger” days.

I am excited to tell you that our staff and leadership team has completed three “pre-retirement” videos that are now available on the IRTA website. These videos bring us much closer to our goal of providing the tools that the local leaders around the state have asked us to develop. In the next few months we anticipate having all the materials available for use on the website.

As we begin another year, I encourage you to continue serving in your community. There are so many needs, and retired educators can provide so much! May 2024 be a year of individual growth, as well as growth for the Indiana Retired Teachers Association.

I invite you to join us for Connecting Virtually on Wednesday, January 24th. The workshop features two identical sessions, each packed with valuable information. I am excited to co-host this highly anticipated third annual event alongside IRTA Executive Director Laura Penman. This 2.5-hour program offers an exclusive glimpse into the classroom of Eric Jenkins, the distinguished Indiana Teacher of the Year, and covers a variety of insightful topics.

We will provide an overview of the IRTA website, such as Retiredside Chats, AMBA Webinars, and our latest addition, pre-retirement resources, ensuring you're not only well-prepared for this important phase of life but also equipped with resources to assist others.

Additionally, we'll share the latest legislative updates and unveil our plans for upcoming IRTA events you won't want to miss.

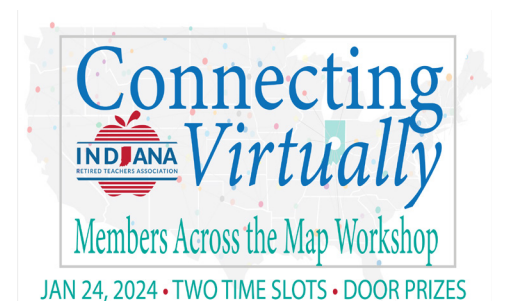
Explore the impactful programs offered by the Indiana Retired Teachers Association Foundation to gain a comprehensive understanding of their initiatives. Discover how these initiatives positively influence the lives of Indiana educators and contribute to the well-being of the broader community. Learn about opportunities for involvement as IRTAF continues its mission to enhance the quality of life for future, current, and retired Indiana educators.

Notable guest speaker Steve Russo will be present to share the latest insights from the Indiana Public Retirement System (INPRS), providing key information crucial for your future plans. Save the date, and let's come together to make this event a memorable and enlightening experience!

Morning Session: 9-11:30am EST

Afternoon Session: 1-3:30pm EST

Please note: The afternoon session is a repeat of the morning session.



Still Time To Register



IRTA F'S ACTIVE TEACHER GRANTS AWARDED!

Helping Educators and their Classrooms

Indiana Retired Teachers Association Foundation understands the importance of helping educators fulfill their classroom missions. That is why IRTAF provides special grants to active educators who foster creativity in students.

Full details at retiredteachers.org/foundation

2023 Recipients

AREA 1

Joshua Suttle, Hanover Central MS • \$500

Wayne Thomas, LaVille Jr/Sr HS • \$500

AREA 2

Judy Yoder, Waterloo Elementary • \$500

AREA 3

Angel Elliott, Caston Elementary • \$500

Julie Worland, Elmwood Primary Learning Center • \$500

AREA 4

Sarah Swafford, Sycamore Elementary • \$500

Trisha Whicker, Mollie B. Hoover Elementary • \$375

AREA 5

Carter Bell, Ralph Waldo Emerson School 58 • \$500

Kindyl Brackin, Lynhurst 7th-8th Grade Center • \$500

AREA 6

Abby Park, Salamonie Elementary • \$500

Samantha King, Selma Elementary • \$500

AREA 7

Bridget Burnett, Hope Elementary • \$400

Mary Buckalew, Hams Elementary • \$500

AREA 8

Valarie Clarke, Washington HS • \$500

Kami Giesler, North Daviess JR/SR HS • \$500

AREA 9

Christine Kiester, South Spencer MS • \$500

Leslie Bell, Owensville Community School • \$500

AREA 10

Sheena Speer, South Ripley Elementary School • \$500

IRTA School Bell Award and Membership Contest in Full Swing!

The ongoing IRTA School Bell Award and Membership Contest is an exciting competition aimed at boosting state IRTA membership across local RTAs. The primary objective of this contest is to increase membership, and local RTAs are competing based on the highest percentage of new state IRTA members and the highest percentage of existing members switching their annual dues payment to the convenient dues deduction method.

The contest is in full swing and will continue until April 30, 2024. We eagerly anticipate announcing the winners and presenting prizes at the Representative Assembly on June 12,



SCHOOL BELL AWARD & MEMBERSHIP CONTEST

2024. The top three winning RTAs will be awarded prizes of \$250, \$150, and \$100, respectively, which can be utilized to further the goals of their local associations.

To sign up or update members, please visit retiredteachers.org. This fantastic initiative is proudly sponsored by the IRTA Membership Committee and

Association Member Benefits Advisors (AMBA).

Let's collectively work towards growing the IRTA membership! Encourage your friends and colleagues to join today. Remember, we are STRONGER TOGETHER!



BENEFITS STILL FIT?

CONSIDER ADDITIONAL INSURANCE COVERAGE

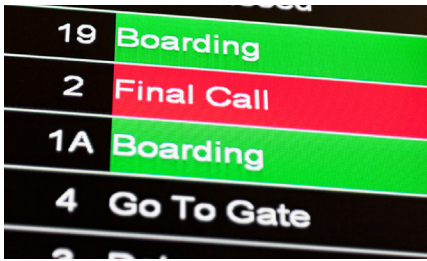
As your life changes, consider the benefits & discounts from **IRTA** & **AMBA**. Call now to find out more.

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

myambabenefits.info/inrta

IRTA - Indiana Retired Teachers Association





**Last Call for
Aug 17-26, 2024
Shades of Ireland**



We still have space on the Shades of Ireland trip. Please contact us by Feb 16, 2024 to reserve your seat & save \$200 per person. For bookings made after that date, please call for rate. For more information, click on below ink:

<https://gateway.gocollette.com/link/1182356>

New Trip for 2025! The Pacific Northwest

The Pacific Northwest: featuring Washington, Oregon, and California is our next big adventure planned for Spring 2025! From the wilds of Mount St. Helens to the shadow of giants in the Redwoods, fall under the spell of the Pacific Northwest and California. Travel along Oregon's beautiful coast, making stops at, Yaquina Head Lighthouse, Newport, Bandon and Coos Bay. Explore Oregon's wilderness on a Rogue River cruise. Visit Redwood National Park's Avenue of the Giants. Cross the Golden Gate Bridge and discover the "City by the Bay," San Francisco. Explore the natural beauty from Seattle to San Francisco.



For more information & to book:

Contact: Melisa Keiser. Phone: 317.848.2990

Email: melisa@carmeltravelcompany.com

INDIANA RETIRED TEACHERS ASSOCIATION

BALANCE SHEET

AS OF 11/30/23

CURRENT ASSETS:		
CASH	\$	47,638
INVESTMENT INCOME RECEIVABLE	0	
DUE FOR IRTAF	0	
PREPAID EXPENSES	14,196	
RETURNED CHECKS	0	
ACCOUNTS RECEIVABLE-LIFE ACCTS	3,796	
ACCOUNTS RECEIVABLE-OTHER	581	
TOTAL CURRENT ASSETS	\$	66,211
INVESTMENTS:		
INVESTMENTS-MSSB-PR MED	153,134	
INVESTMENTS-MSSB-CD	299,325	
INVESTMENTS-MSSB-CORP	2,575,307	
TOTAL INVESTMENTS	\$	3,027,766
PROPERTY AND EQUIPMENT:		
RIGHT-OF-USE ASSETS OPERATING	129,968	
ROU ACCUMULATED AMORTIZATION-OP	(57,497)	
FIX ASSETS	\$	89,584
LEASEHOLD IMPROVEMENTS	2,292	
LESS ACCUMULATED DEPRECIATION	(86,485)	
TOTAL PROPERTY & EQUIPMENT	\$	77,863
TOTAL ASSETS		\$ 3,171,839
LIABILITIES AND FUND BALANCES:		
ACCOUNTS PAYABLE	4,573	
EMPLOYEE WITHHOLDINGS	0	
ACCRUED PAYROLL	8,325	
TOTAL CURRENT LIABILITIES	\$	12,898
DEFERRED REVENUE-MISC	5,833	
RETIREMENT INSURANCE LIABILITY	68,000	
RETIREMENT INSURANCE DISCOUNT	(20,503)	
ROU LEASE LIABILITIES-CURRENT	61,766	
UNEARNED MEMBER DUES	2,633	
UNEARNED LIFE MEMBER DUES	112,158	
LIFE MEMBER-INSTALLMENTS DUE	5,599	
ROU LEASE LIABILITIES - LONG TERM	15,777	
TOTAL OTHER LIABILITIES	\$	251,263
TOTAL LIABILITIES	\$	264,161
FUND BALANCES:		
FUND BALANCE	2,490,678	
UNRESTRICTED NET ASSETS-BD DESIGNATED	191,792	
GENERAL FUND	\$	2,682,470
NET INCOME (LOSS)	225,208	
TOTAL LIABILITIES & FUND BALANCES	\$	3,171,839

INDIANA RETIRED TEACHERS ASSOCIATION

VARIANCE REPORT

SIX-MONTH PERIOD ENDED 11/30/23

	Year-to-date Amount	Budget-year-to-date Amount	Var- amt	Var-%
INCOME:				
REGULAR MEMBER DUES * Does not include Life Members	477,741	633,000	(155,259)	-24.5%
ASSOCIATE MEMBER DUES	23,033	30,500	(7,467)	-24.5%
GAIN/(LOSS) ON SALE-SECURITIES				
TCU INTEREST-ASSOCIATION	23			
INVESTMENT INCOME-TOTAL	27,561	55,000	(27,439)	-49.9%
OoS Meet/Virtual Events Income	1,000			
REPRESENTATIVE ASSEMBLY INCOME	0	5,700		
MISCELLANEOUS INCOME	3			
SALE OF IRTA MERCHANDISE				
ROYALTY ENDORSEMENT FEE	29,387	75,000	(45,613)	-60.8%
TOTAL INCOME	557,748	800,200	(242,452)	-30.3%
OFFICE OPERATIONS:				
OCCUPANCY-RENT	24,795	56,000	(31,205)	-55.7%
INFORMATION TECHNOLOGY & MAINT.	9,152	26,000	(16,848)	-64.8%
STAFF TRAVEL, PARKING & MEALS	379	5,600	(5,221)	-93.2%
SALARIES-OFFICE STAFF	121,548	284,000	(162,452)	-57.2%
PAYROLL TAXES & RETIREMENT EXPENSE	14,345	33,050	(18,705)	-56.6%
GROUP INSURANCE	34,154	80,000	(45,846)	-57.3%
OTHER INSURANCE	10,007	10,000	7	0.1%
DUES & SUBSCRIPTIONS	723	1,000	(277)	-27.7%
OFFICE, PAYROLL SERVICES, & OTHER EXP	2,330	5,200	(2,870)	-55.2%
UNFORSEEABLE EXPENSES	0	0	0	#DIV/0!
POSTAGE EXPENSE	8,223	22,000	(13,777)	-62.6%
PRINTING & SUPPLIES	14,564	18,000	(3,436)	-19.1%
LEGAL & ACCOUNTING	8,411	15,700	(7,289)	-46.4%
DEPRECIATION EXPENSE	1,565	13,000	(11,435)	-88.0%
DISCOUNT ON RETIREMENT LIABILITY	0			
TOTAL OFFICE OPERATIONS EXPENSE	250,196	569,550	(319,354)	-56.1%
PROGRAM EXPENSES:				
MARKETING EXPENSE	145	35,000	(34,855)	-99.6%
INVESTMENT MANAGEMENT FEES-TOTAL	11,285	27,500	(16,215)	-59.0%
UNDESIGNATED PROGRAM EXPENSES	0	0	0	#DIV/0!
REPRESENTATIVE ASSEMBLY EXPENSE	0	20,000	(20,000)	-100.0%
COMMITTEE MEETINGS OTHER	1,849	6,600	(4,751)	-72.0%
SUMMER LEADERSHIP/FALL WKSH EXPENSE	17,479	15,250	2,229	14.6%
OoS MEET/VIRTUAL EVENTS INCOME	2,500	(2,500)	(2,500)	-100.0%
PRESIDENTS EXPENSE	1,482	6,000	(4,518)	-75.3%
BOARD OFFICERS EXPENSE	9,780	30,000	(20,220)	-67.4%
QUARTERLY NEWSLETTERS	23,474	42,000	(18,526)	-44.1%
LEGISLATIVE	601	4,000	(3,399)	-85.0%
LOBBYING SERVICE	16,250	39,000	(22,750)	-58.3%
TOTAL OTHER	82,344	227,850	(145,506)	-63.9%
TOTAL EXPENSES	332,540	797,400	(464,860)	-58.3%
EXCESS OF INCOME OVER EXPENSES	225,208	2,800	222,408	

Postmaster:

Send address changes to:

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



Support IRTAF Through Kroger Community Rewards

Exciting news! You can now effortlessly support the Indiana Retired Teachers Association Foundation through the Kroger Community Rewards program.

Create a Digital Account:

If you don't have one, set up a digital account. Already have one? Link your Shopper's Card to ensure your transactions benefit our cause.

Link Your Card to Us:

- Sign in to your digital account.
- Search for us using our name
- Select "Indiana Retired Teachers Association" and click "Save."

Start Earning:

Every time you shop with your linked Shopper's Card, Kroger donates to our foundation, at no extra cost to you.

Your small effort can make a significant impact! Join today, support our cause, and spread the word. Let's make a difference together!



kroger.com/account/communityrewards

ACTION NEEDED

If you enjoy receiving IRTA's quarterly Bulletin Board, we need to hear from you! We offer the choice to receive this publication digitally or printed. While we plan to continue offering both options to our members, there are reasons we encourage you to switch to digital.

- Costs to print and post the Bulletin Board are steadily rising.
- Digital is faster! The time for information to travel from us to you is just a click.
- Digital allows us to include more information, photos, and engaging content.

Please complete the online survey at retiredteachers.org to update your preference. If you wish to continue to receive your quarterly IRTA Bulletin Board in print AND are unable to fill out the online form, please notify our office at info@retiredteachers.org or 1-888-454-9333.



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Indiana Retired Teachers Association
2629 Waterfront Parkway East Drive, Suite 105
Indianapolis, IN 46214