



## The Retirement Trust Foundation

*Connections talks to RTF Board of Trustees Chairman Kathy Hampton CPS/CAP*

Q Why are you so committed to the RTF—what is your interest in it?

A The fact that our association created this entity in the interest to helping their own is far greater than any other professional association has ever done. We have an asset in our Vista Grande facility in Rio Rancho, New Mexico where we can offer affordable, dignified housing to members and through the Housing Subsidy for Admins in Need (HSAN) program, we can help our own while they reside in the communities where their family and friends are. We are unique and it is exciting that the ‘typically lower paid’ admins have come together to make all of this happen. It says a lot about us as professionals and how we care about the welfare of our colleagues. Through the years there has been change, but I believe the greatest amount of change has come over the past three years. Trustees have been working tremendously hard to organize better, how the Trust is run. We have found several ways of saving money in the operation of the Trust, as well as ways to make ourselves (trustees), and the headquarters staff we work with more accountable for our responsibilities. We have documented plans, policies, manuals and approaches to streamline. Through surveys of members, we have the information necessary to be prepared and a step ahead of them so that if necessary, we are in a position to provide assistance.

Q As a member of IAAP, we just had a significant dues increase in 2009—why is the Trust asking us to donate to them?

A You must remember that the RTF is a separate, stand-alone entity from IAAP. It is a 501(c)3 organization and **NONE** of your dues are allocated or transferred to the Trust. The Trust is able to help our own through the generous donations from members.

Q How does the Trust help members?

A The Trust is a benefit to all members of IAAP should they require a subsidy for housing expenses at a later stage. We do that through our Housing Subsidy for Admins in Need (HSAN) program. To accomplish that benefit, we fundraise on an individual basis through the Family of Givers (FOG) program that has the ability to provide tax deductible receipts for donations (U.S. members only at this time), as well as receive matching gifts from employers that offer matching. Also, there are fundraising efforts at chapter and division activities and we accept bequests from estates, memoriam and donations in honor of.

Q Tell me more about the Housing Subsidy for Admins in Need (HSAN) Program.

A Formerly known as the Financial Assistance Program, Trustees changed the name to HSAN so that it identified better with our mission statement. The Trust can provide a housing subsidy to any member of IAAP within its six districts who meet the criteria. If you are over the age of 55 years, meet the financial criteria, and live in a seniors' complex - you are likely eligible. The HSAN program is making Vista Grande virtual—you don't have to uproot from your family and friends to move to New Mexico to take advantage of our housing subsidy, we can bring it to you!

Q What is the Family of Givers Program?

A The Family of Givers (FOG) program was initiated about three years ago. It is a way to ask members for a more significant contribution that we can track and provide a tax deductible receipt to them (U.S. members only). By tracking, we can offer acknowledgement at various levels of giving and members can challenge themselves to reach those levels at different times as their donations accumulate—from their initial donation and onward. One day we are going to have the Family of Givers Wall of Fame at our headquarters building filled with the names of FOG members!

Q I am a member in Canada District – why do I not qualify for a tax receipt?

A We are working with the Canada Revenue Agency to qualify, however as in any government organization, there is a lot of bureaucracy. Since we are headquartered in the U.S. there is a lot of red tape to get past. Be assured, we are doing our best to accomplish our goal of being a recognized charity within Canada.

Q What is Vista Grande?

A Vista Grande is the original idea of assisting and helping our own by providing affordable and dignified housing to administrative professionals. Vista Grande is only a small portion of how the Trust assists admins in need because it is static. The Trust contracts a local management company to operate our property and report to us the monthly financial status and a quarterly operations overview. Vista Grande currently has 168 rental units and is one of the most desired senior facilities in the Albuquerque area. Please understand that Vista Grande is not an assisted living facility, it has individual units for seniors to cook their own meals and be independent but still provide affordable, dignified housing along with community planned events.

Q What exactly does a Trustee do in that role?

A As a board, trustee's manage the operation of the foundation—ensuring that the mission statement is adhered to, setting and keeping within budgets, oversee the management of Vista Grande, fundraising and approval of housing subsidies through the HSAN program grants—where we NEVER know who the applicants are. The IAAP controller receives applicant's information and disseminates the information into criteria categories so the trustees only see the financial facts of the 'numbered' applicant. Within the board of trustees, we elect for internal positions which further assign more specific duties to be carried out.

Chairman—supervises the business and affairs of the foundation; carrying out the orders, resolutions and assignments of the board of trustees. They serve as the spokesperson for the foundation and contact between the IAAP Board of Directors, IAAP Headquarters, and the property management company contracted to provide services to Vista Grande. The chairman appoints special committees within the board of trustees to further the business of the foundation.

Vice Chairman—works closely with the chairman in preparation to take on the role of Chairman the next year. Specific responsibilities include preparing a draft of an Annual Report of Activities to be included in the Annual Report of the Foundation, drafts or coordinates with IAAP Headquarters – drawings of pins for board of trustees selection and approval of the RTF pin for that year, and prepares draft of the script to be used at district caucuses at the International Education Forum and Annual Meeting.

RTFC Liaison—works closely with the RTF committee members who represent each of the six districts of IAAP. They ensure consistent information is passed to the RTFC representatives to be further passed to members. The RTFC liaison hosts a monthly teleconference call with RTFC representatives to keep the flow of information current and enable action on questions that arise from members. They also coordinate the collection of RTFC reports in preparation for board of trustee meetings.

Secretary—takes the minutes of the board of trustees meetings in the appropriate format and that completed motion forms are included with the final, endorsed minutes. As well, borne from the minutes – a detailed action items list is created and sent in a timely manner to trustees and IAAP Headquarters staff specific to the Trust. They watch the action items listing closely and prompt attention of the deadlines to those assigned to any action to ensure the work of the Trust progresses.

Q What is the future of the Trust?

A Since 2008 the Trust has been following the recommendations in the book “7 Measures of Success – What Remarkable Associations Do That Others Don’t.” You may recall that the Trust had three surveys of IAAP members in the past year. The information gained from those surveys is driving the direction of the Trust as we take a long, objective look at where the current needs are and how they can best be met in the future for as many members as possible. We are currently gauging for the growth of the HSAN program and as we see that occurring, the need to ensure that the Family of Givers program has positioned itself for donation growth to be able to assist those who will be requiring housing assistance is paramount.

*Find out more information about the Trust at their website: <http://www.iaap-rtf.org/>*