

# **Teachers Annuity and Aid Association of the District of Columbia**

## **Summary of Program**

### **Q. What is the Teachers Annuity and Aid Association of the District of Columbia?**

**A.** The Teachers Annuity and Aid Association of the District of Columbia (“Association”) was originally established in 1894 to provide retirement income to retired District of Columbia Public Schools teachers who were dues-paying members of the Association. Once the District of Columbia implemented a government-sponsored retirement plan for teachers, the need for the Association was eliminated and no new members were admitted. Remaining funds of the Association were dedicated to provide financial support to teachers who became temporarily or permanently incapacitated either physically or mentally as determined by the Association’s Board of Trustees. The program was dormant for many years but in 2011, a new Board of Trustees was appointed and an application was filed with the IRS to ensure that the remaining assets in the Association remain tax-exempt. IRS approved the application and the Association is now a “501(c)(11) Trust Fund” under the Internal Revenue Code. Its purpose continues to be to provide financial support to eligible participants who become temporarily or permanently incapacitated either physically or mentally as determined by the Association’s Board of Trustees.

### **Q. How is the Association Funded?**

**A.** The Association was originally financed by its dues-paying members but no new dues are required or permitted. Any income to the Association is solely from interest and investment earnings on the Association’s assets. There are no guarantees that the Program will continue since it has no source of income other than earnings on investments. If the Association were ever discontinued, any remaining assets will be used, as required by law, in a manner which is consistent with the purpose of the Association, which is to provide financial support to incapacitated members and to defray administrative expenses.

### **Q. Who is responsible for the operation and administration of the Association?**

**A.** As required by the founding documents, the “Trustee” of the Association is PNC Bank (the successor to the original Trustee, the Washington Loan and Trust Company). PNC Bank holds the Association’s assets and is responsible for all decisions regarding investment of the Association’s assets. The Association is operated and administered on a day-to-day basis by a Board of Trustees, members of whom may be appointed by the Washington Teachers’ Union (the “WTU”), the President of the school system’s Parent Teacher’s Association (the “PTA” or an equivalent body) and the District of Columbia Public Schools (“DCPS”). However, the PTA has yet to appoint a member to the Board of Trustees so it is currently made up of members appointed by the WTU and DCPS.

**Q. Who is eligible to receive benefits for calendar year 2014?**

**A.** For calendar year 2014, any individual who is a “Teacher” as defined in the Collective Bargaining Agreement between the Washington Teachers’ Union and the District of Columbia Public Schools is eligible to participate in the Association. A “Teacher” is defined as any member of the Washington Teachers’ Union bargaining unit. This term applies to dues-paying members of the bargaining unit as well as “agency fee” members as defined in Article I of the Collective Bargaining Agreement.

**Q. What are the eligibility requirements for receipt of benefits from the Association?**

**A.** To be eligible for benefits, a participant must have met ONE of the following requirements during calendar year 2014:

- The applicant was approved for disability retirement from their Washington, D.C. public school and ceased working due to a disability, or
- The applicant received or was approved to receive Long-Term Disability (LTD) Benefits under their Washington, D.C. public school employer’s Long-Term Disability Plan, or
- The applicant was approved by their Washington, D.C. public school employer for a leave of absence due to their own medical condition and exhausted all applicable paid leave balances during their leave of absence, and they did not return to work during the 7-day period following their exhaustion of their paid leave balance.

If you met any of these requirements during calendar year 2014, you may apply for a benefit.

To apply for benefits from the Association, applicants must complete the enclosed Benefit Application, which is also available on-line at [www.wtulocal6.org](http://www.wtulocal6.org) or by calling Dorothy Egbufor at (202) 293-8600.

**Q. What is the amount of the Association benefit?**

**A.** \$600.00 paid no later than ninety (90) days after the close of the calendar year in which your benefit was approved.

**Q. If I am denied a benefit, can I reapply for a benefit if my circumstances change?**

**A.** Yes.

**Q. Can I receive more than one benefit from the Association?**

**A.** You may receive only one benefit payment each calendar year.

**Q. If my application for a benefit is denied from the Association, can I request a review of the denial of benefits?**

**A.** Yes. If you disagree with a benefit determination made by the Board of Trustees, you will have the right to appeal their decision at which time you may submit additional documentation, if any, in support of your application for benefits. The Board of Trustees will perform a detailed review and advise you as soon as practicable of their final decision.

**Q. Who should be contacted for more information about the Association or for a Benefit Application?**

**A.** Dorothy Egbufor, 1239 Pennsylvania Ave SE, Washington, DC 20003  
(202) 293-8600