MEMORANDUM

TO: Local Association Presidents

FROM: Tim Abrams.
       Executive Director

DATE: July 2022

SUBJECT: Local President's Handbook

We are providing this handbook to help you and your local association meet the challenges facing you as we begin a new fiscal year. This method of communicating with you is in no way intended to mandate the way you operate your association. These suggested materials are simply provided to assist you in organizing and accomplishing your goals.

The Local President's Handbook is divided in to two (2) parts with other suggested information interspersed within them:

✓ Local Association Report Forms
✓ KRTA Documents for Informing and Promoting

Consider the Handbook as a working copy from which you may draw the needed report forms. Feel free to make suggestions for improvement. Another copy will be provided next July for you or the incoming president for 2023-24.

If you wish to submit an article for the KRTA News in 2022-23, please adhere to the following schedule:

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<thead>
<tr>
<th>2022-23 Issue</th>
<th>Deadline Date</th>
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<tr>
<td>November</td>
<td>September 20, 2022</td>
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<tr>
<td>March</td>
<td>January 20, 2023</td>
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<tr>
<td>July</td>
<td>May 19, 2023</td>
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Note: There will be two electronic newsletters (KRTA News Express) emailed to members and available on the KRTA website (May and September).

Any picture or logo submitted with an article must be an original and sent in digital format. Pictures cut from a newspaper cannot be used. Submissions may be emailed to brenda.meredith@krtta.org.

Good luck for a successful year! If we can help you in any way, do not hesitate to let us know.
2022-2023 Tentative Events Calendar

Executive Council Meetings:
- August 22, 2022 – KRTA Office
- December 5, 2022 - KRTA Office
- April 17, 2023 – Holiday Inn East, Louisville, KY
- June 5, 2023 – KRTA Office

Health & Insurance Committee Meeting:
- October 17, 2022 – KRTA Office

Legislative Committee Meetings:
- July 18, 2022 – KRTA Office
- November 14, 2022 – KRTA Office

Membership & Pre-Retirement Committee Meeting:
- July 25, 2022 – KRTA Office

KRTA Convention:
- April 17 & 18, 2023 – Holiday Inn East, Louisville, KY

District Presidents Meetings:
- July 11, 2022 – KRTA Office
- April 17, 2023 – KRTA Convention

2022-23 Membership Campaign: Final membership report printed on MLK Day

Retired Teachers Appreciation Week- October 17-21, 2022

KRTA Local and District Recognition Forms:
- March 15, 2023 – Due to KRTA Office

Volunteer Hours:
- March 15, 2023 – (Jan 1-Dec 31) – Report hours on Local Recognition Form

School Supply Drive/ Feed KY Program: Application for $50 matching grant will be mailed to local presidents
- March 15, 2023 – Report number of bags of school supplies contributed on Local Recognition Form
- March 15, 2023 – Report number of food items contributed on Local Recognition Form

Frank R Hatfield Volunteer of the Year Award:
- February 3, 2023, Local Presidents submit candidates to District Presidents
- March 15, 2023, District Presidents submit candidates to KRTA State Office
- April 18, 2023, State Award Winner Announced

KRTA/AARP Grandparent Essay Contest:
- School Winner Dec 15, 2022
- County Winner Jan 31, 2023
- District Winner March 1, 2023
- State Winner announced at Convention

2022-23 KRTA NEWS – Print Dates:
- July 2022 Issue – Submission Deadline May 20, 2022
- November 2022 Issue – Submission Deadline September 20, 2022
- March 2023 Issue – Submission Deadline January 20, 2023

2022-2023 KRTA NEWS EXPRESS (Electronic Newsletter) – Release Dates:
- September 2022
- January 2023
- May 2023
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The following may be helpful in your efforts to promote the Kentucky Retired Teachers Association. Forms may be duplicated and given to new retirees as well as current members. The more we know, the better we can represent the benefits of KRTA to others.

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INTRODUCTION

This Local President's Handbook is provided as a guide for the local association presidents for the 2022-2023 membership year.

Presidents are encouraged to pull forms from this handbook when report due notices are received from the KRTA office. The check sheet on pages 3-5 may help in keeping up with what is required and when. Other forms that represent suggested activities may be used in any way that may be helpful. The KRTA documents contained in Part II may be duplicated and distributed as needed for both current and prospective members.

Again, this is a working copy from which to draw the needed report forms. Share other pages with local officers, chairpersons and members. Another copy will be provided next year for the incoming president for 2022-2023.

A few revisions are made each year to this local president’s handbook. Please give us your suggestions for additions, deletions and revisions—anything you feel would make it more helpful to you as a local association president.
LOCAL RTA PRESIDENT:

The following checklist is provided for your assistance in completing forms for the KRTA office and progressing with local functions in a timely and efficient manner. Many of these duties may be performed by other local association officers/members, but it is the President's responsibility to see that all required activities are completed.

The various forms are provided for your use this fiscal year (July - June). Another President's Handbook (with needed revisions) will be provided the incoming president next year.

- Meet with the local executive committee by July or August to plan programs and meeting dates and places for the upcoming year.
- Make committee assignments and/or ask for volunteers (See Local Committee Assignment Form 2). You do not need to send this to the KRTA Office.
- Prepare budget for upcoming year.
- Hold a total of 4-6 meetings per year for points on the Local Association Recognition Program Form 3 (Item 5). Have at least one program per year on Membership, Legislation, Health/Insurance, and Member Care.

♦ Membership: Plan promotional activities for local, district, and state membership.

♦ Legislation: Inform membership of current legislative issues/concerns and update them on the State Legislative Program.

♦ Health/Insurance: Secure, review, and distribute information pertaining to health and insurance, including maintaining a healthy lifestyle.

♦ Member Care: Suggested activities may include visiting nursing homes (or holding meetings in the nursing home if retired teachers...
reside there); inviting AARP speakers on Medicare/social security issues (see pages 15a-b); etc.

See *Local Unit Program Suggestions Form 4* for additional program ideas.

- Recognize new retirees at a luncheon, dinner, or reception. Retirees should be introduced to KRTA and given the opportunity to sign an automatic dues deduction (ADD) card. (See *Explanation Form 5A*). Complete *New Retiree Recognition Program Reimbursement Form 5B* and mail it to the KRTA Office after the meeting takes place to receive $15 for each new retiree in attendance. (Reimbursement may be used to pay for the meals and/or token gifts). Recognition of retirees and application for reimbursement may occur at any time of the year, but it **MUST** be done within the fiscal year (before July 1).

- Working with the Secretary, be responsible for communicating with the membership concerning meetings, legislative and health/insurance updates, and any other “news” that needs to come to the attention of the membership.

- Arrange for a total of at least five (5) officers and/or committee chairpersons to attend the Fall Workshop. (See *KRTA Fall Workshop Schedule Form 6*). Send *Fall Workshop Reservations Form 7* to the District Workshop Contact Person by the designated date. You may choose from the following:
  
  - President
  - VP/President Elect
  - Secretary
  - Treasurer
  - Membership Chair
  - Legislative Chair
  - Health & Insurance Chair
  - Others

Encourage the Vice-President or President-Elect to be actively involved in the activities of the standing committees as an overseer and guide.

- **Membership:** Promote local and state membership by planning membership drive(s). You can be most effective by coordination this with the KRTA Office Membership Procedures Form24. Call the KRTA office for updated membership lists and labels whenever needed. (See *Membership Committee Responsibilities Form 8 and Local Membership List Correction Form 9*)

- **Legislative:** Help with updates to the membership, especially during the meeting of the Kentucky General Assembly. During the General Assembly, regular reports on legislative activities are sent to all local presidents and will be posted on the KRTA website at [www.krta.org](http://www.krta.org).
(See Legislative Committee Responsibilities Form 11 and Telephone Tree Form 16)

♦ Health/Insurance: Help keep membership informed on current insurance concerns and healthy lifestyles. (See Health/Insurance Committee Responsibilities Form 15 and Telephone Tree Form 16).

➤ KRTA State Convention (April)

♦ Elect delegates to the KRTA State Convention and return Delegates to the 2023 Delegate Assembly Form 20 along with a check ($39.00 for each delegate) to the KRTA office by the designated date. (Guidelines: One delegate per each set of 50 active members.)

➤ Complete Local Association Recognition Program and send it to the KRTA office by the designated date.

➤ Talley the total number of volunteer hours and list volunteer activities for the local association for the period January 1-December 31 required for item #16 on the Local Recognition Form.

➤ Elect officers by early June (Send Local Officers Report to KRTA Office as soon as possible). The fiscal year begins July 1.

➤ At any time, send local association news and photos to info@krta.org accompanied by named persons and named activity for the KRTA News.

➤ Use any of the SAMPLE FORMS as you deem helpful for promotion/information.

➤ Donation of a minimum of $25 to the N.O. Kimbler Memorial Scholarship Fund and the Bourgard Fund.
INTRODUCING....

LOCAL ASSOCIATION REPORT FORMS
# LOCAL OFFICER FORM

| LOCAL: | | YEAR: | |  |
| -- | | | | |

**LOCAL PRESIDENT:**

- PHONE: 
- ADDRESS: 
- EMAIL: 

**LOCAL V. PRESIDENT:**

- PHONE: 
- ADDRESS: 
- EMAIL: 

**LOCAL TREASURE:**

- PHONE: 
- ADDRESS: 
- EMAIL: 

**LOCAL MEMBERSHIP:**

- PHONE: 
- ADDRESS: 
- EMAIL: 

**LOCAL LEGISLATIVE:**

- PHONE: 
- ADDRESS: 
- EMAIL: 

**LOCAL HEALTH & INS:**

- PHONE: 
- ADDRESS: 
- EMAIL: 

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*Serving Retired Teachers Since 1957*
SAMPLE LOCAL OFFICER RECOGNITION AND INSTALLATION

On behalf of the Kentucky Retired Teachers Association, I want to publicly recognize the outgoing officers for their dedication to the __________ County RTA during the past year.

安装新上任的本地官员

现在，让我们安装你的新官员。新官员们将前来接受认可，成为 __________ County RTA 在 2022-23 年的领导。请站在我的右边，先生或女士主席，请站在我的左边。所有其他官员，请站在我的左边。

向所有官员（除主席外）的致辞

你们被选举为 __________ County RTA 在 2022-23 年的领导人。你们是否保证忠实地履行你们各自职务在你们 RTA 的章程中所规定的所有职责？

回答：“我们将”
(安装者将给每人颁发一份证书)

向主席的致辞

__________，你被选举为 __________ County RTA 的主席。你们的当选应受到祝贺。你们被选中是因为你们的能力、可靠性以及领导力。是你们的责任感，领导整个组织在所有事业中。

__________，你是否保证忠实地履行你作为 __________ County RTA 主席的职责？

回答：“我将”
(安装者将给主席颁发一份证书)

向会员的致辞

作为 __________ County RTA 的成员，你们有为官员和组织承担责任的责任。你们是否保证为这些已经当选的官员提供支持，并且合作使这个行政机构成为一个成功的一个？

回答：“我们将”

你们的职责作为成员、官员和本地 RTA 领导者将会是巨大的挑战。你们有责任共同努力，服务社区，互相友爱。

你们的主席、官员和其他本地 RTA 领导者带着高希望来到你们身边，但是如果没有你们的支持和合作，他们什么都做不成。你们可以走得更远，取得更大的成就，如果你们共同努力。

向所有成员（官员和其他成员）的致辞

愿你们各自努力“为服务，不被服务”，“认识到个人的尊严和对个人的有用性”，并且共同努力保持 __________ County RTA 作为一个强大和有生命力的组织，继续为我们青年的教育和退休教师的需求提供支持。

请欢迎你们的 2022-23 年领导人。官员们可以就座。谢谢您!
President

of

County Retired Teachers Association

Installed this ___ day of __________. ____
to fulfill the following responsibilities:

♦ Be the executive officer of presiding at all meetings
♦ Be responsible for the completion and timely return of forms/reports to the KRTA office as described in the Local President's Handbook
♦ Be responsible for planning meetings annually with emphasis on Membership, Legislation, and Health/Insurance
♦ Be responsible for registering members (through your district president) for the Fall Workshop
♦ Promote programs endorsed by KRTA
♦ Receive and distribute information during sessions of the General Assembly
♦ Report to the KRTA office on local activities
These are suggested committees that may be formed to help lighten the work of the President. The Vice-President or President-Elect may oversee/coordinate their work.

<table>
<thead>
<tr>
<th>Committee</th>
<th>Chair</th>
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<tbody>
<tr>
<td>Legislative Committee</td>
<td></td>
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<tr>
<td>Health/Insurance Committee</td>
<td></td>
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<tr>
<td>Membership Committee</td>
<td></td>
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<tr>
<td>Communications Committee</td>
<td>Secretary</td>
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<tr>
<td>Public Relations Committee</td>
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<td>Program Committee</td>
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<td>Caring Committee</td>
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<td>Hospitality Committee</td>
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<td>Community Service Committee</td>
<td></td>
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<tr>
<td>Devotion Committee</td>
<td></td>
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<tr>
<td>Finance Committee</td>
<td>Treasurer</td>
</tr>
<tr>
<td>Telephone Committee</td>
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LOCAL ASSOCIATION RECOGNITION PROGRAM

Association Name: ____________________________________________

PURPOSE: The purposes of this program are two-fold:

1) To encourage local associations to support the programs and goals of KRTA.
2) To recognize those associations that are most successful in supporting and carrying out those programs and goals.

PROCEDURE: The Local Association President should complete the following rating scale by filling in the appropriate number of points for each item based on his/her Association's activity. (Items 2 & 3 will be completed at the KRTA office). The completed form must be returned to the KRTA office 7800 Leaders Lane, Louisville, KY 40291 by March 15.

Local Associations who receive sufficient points will be recognized at the Annual Convention and presented with a certificate of merit. Levels of recognition will include:

- Gold Seal 425 Points
- Silver Seal 375 Points
- Bronze Seal 325 Points

CRITERIA: *(Items 2 and 3 will be completed at the KRTA office).

1. Number of members in your local (county) RTA paying dues to your local RTA local RTA members

2. *Achieved assigned membership % goals. "Yes We Did Award"
3. *Achieved greatest gain in members "Top Hat Award"

KRTA will calculate the points for #1, 2 and 3

4. Holds

Three (3) meetings per year 15 Points
Four (4) or more meetings per year 20 Points

5. Has at least one program per year on Health and Insurance, Membership, Legislation

Health & Insurance 15 Points
Membership 15 Points
Legislation 15 Points
Member Care 15 Points
Other 15 Points

6/5/17
6. School Supply 10 Points
   ** (Number of bags of school supplies _____ or $_____ contributed)

   Feed Kentucky Program 10 Points
   ** (Number of food items _____ or $_____ contributed)

   Other
   ** (i.e. Relay for Life, Blood Drives, Food Banks, etc.)
   Explain briefly:


7. Grandparent Essay Contest 15 Points

8. Contacts new retirees about joining local and state association using labels provided
   monthly to the local association president by KRTA 20 Points

9. Holds meeting to honor new retirees and distributes KRTA materials including ADD cards
   to those attending 15 Points

10. Officers and/or committee chairs attend the Fall Workshop
    1-4 10 Points
    5 or more 20 Points

11. Officers are elected prior to July 1 of the year they are to begin serving and notice is sent
    to the KRTA office 20 Points

12. Delegates are elected and attend the state convention 25 Points

13. Makes a contribution of $25 or more to the Kimbler Scholarship Fund 10 Points

14. Makes a contribution of $25 or more to the Bourgard Fund 10 Points

15. Maintains active committees in the following areas:
    Health and Insurance 20 Points
    Legislation 20 Points
    Membership/Pre-Retirement 20 Points

16 Makes periodic contacts with legislators concerning current issues
    Explain Briefly 20 Points

17. Distributes local RTA news (printed or electronic) to members (attach a sample) 10 Points

18. Individual members contribute to the community through volunteer engagement activities
    (ie. Nursing homes, assisted living facilities, schools, hospitals, churches, NRTA National Day
    of Service, Tax Aid, Drive Alive, etc.) 15 Points
Total Volunteer Hours for Local (January 1-December 31):

*** Volunteer with the most hours: ________________________ Hours: ________

*** Volunteer with the most hours with youth: ________________ Hours: ________

Explain briefly:

________________________________________________________________________

________________________________________________________________________

** Required to earn points

*** Optional/not required

LOCAL ASSOCIATION

_________________________

PRESIDENT

_________________________

PRESIDENT’S PHONE NUMBER

_________________________

DATE

6/5/17
LOCAL ASSOCIATION PROGRAM
SUGGESTIONS

- AARP Materials (visual and printed)
- AARP Speakers
- Estate Planning by a local attorney
- Finance & Investment Services (Call Hank Hensley, 1-800-927-0030)
- Health & Insurance by a representative from KRTA
- Legislation by a representative from KRTA
- Membership by a representative from KRTA
- Diets for the retiree by a nutritionist
- Taxes and New Legislation by a CPA
- Travelogue by local members
- Education Reform by Legislators
- Program honoring new retirees
- Schools and philosophy of education by the County superintendent
- Director of Adult Education
- Program presented by a school group
- Medicines and use of the computer in keeping up with an one’s medical history by a Pharmacist
- Overview of the services available to the community by a Mental Health Services speaker
- Cancer by a Cancer Clinic representative
- The Living Will
- Hospice services offered
- Positive attitude speaker
- Update on KRTA by a KRTA representative (Tim Abrams, Director, Greg Roush, Deputy Director, or officers: Golden Hale, Bill Kelley, Steve Gillespie, Rick Tatum)
- Long-term health care
- Historical Society speaker
- Life in another country by an exchange student
- The Needs and Rewards of Volunteerism
- Self Protection by a member of local police department
- Health Program emphasizing diabetes, cholesterol and high blood pressure
- Drivers Training Program from AARP
- Vision after 50 by an eye specialist
- Relaxation Techniques
- Memorial Service
- Inspiration
- Book Reviews
- Panel discussions on current events
- “Show and Tell”—Each member bring samples of work they are involved with during retirement (crafts, paintings, flowers, etc.).
KRTA COMMITTEE CO-CHAIRS

LEGISLATIVE CO-CHAIRS

Marshall Ward
1308 Oak Hill Dr
Murray, KY 42071
(270)293-9041
josephmarshallward@gmail.com

Allan Schuler
6420 Villa Springs Dr.
Louisville, KY 40291
(502) 239-1559
satrer31@twc.com

Larry Woods
1427 Kemper Lane
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(859) 742-1377/(270) 999-1121
lkw53@windstream.net

HEALTH & INSURANCE CHAIR

Margaret Head Sims
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Ed Cook III
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Olive Hill KY 41164
(606) 316-7148
edwincookiii@yahoo.com

MEMBERSHIP CO-CHAIRS

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Shepherdsville, KY 40165-7423
(502) 957-2305 / 502-494-9114
Hester.bettydon69@aol.com

Debby Murrell
2805 Alice Avenue
Louisville, KY 40220-1703
(502) 458-5125 /387-7472
dasailboat@msn.com

CONTACT ANY OF THESE CHAIRS

WHEN YOU NEED SPEAKERS OR ASSISTANCE

Betty Hester  Debby Murrell
Kentucky Grandparent of the Year Essay Contest
2022-23 GUIDELINES

*Access this information & all contest forms online at aarp.org/kygrandparentessay*

SUBJECT: “Why my Grandparent should be the AARP Kentucky Grandparent of the Year”

ELIGIBILITY: Contest is administered by the Kentucky Retired Teachers Association and is for 5th graders in Kentucky public schools.

TECHNICAL REQUIREMENTS (must meet ALL criteria to proceed):
- Must be an original work of the author, handwritten on one side only, on white, lined 8”x11” paper
- 300-500 words in length, written in English (Every word -a, in, the, etc.- counts towards the word count).
- Essay must be written about (only) one grandparent or surrogate grandparent, (e.g. someone the child considers to be “like a grandparent”) who is alive at the time the essay is written.
- Include the components of a formal essay (introduction, supporting points and conclusion).
- Name and school of the author must be written at the end of the essay.
- The winning essay from each school must be submitted with an official entry form. The entry forms can be photocopied.

DEADLINES:
- School winner deadline: December 15, 2022
- County winner deadline: January 31, 2023
- District winner deadline: March 1, 2023

State winner will be announced at the Kentucky Retired Teachers Association (KRTA) Annual Meeting in April 2023. Entries postmarked or received at the AARP Kentucky State Office after the stated deadlines cannot be considered.

JUDGING CRITERIA & AWARDS:
- Qualifying characteristics of nominee as a grandparent or surrogate grandparent 60%
- Creativity & Expression 20%
- Grammar, Form & Neatness 20%

School winner: Chosen by 5th grade teachers from the submitting school. There can be only one school winner per school; both the participating school and its winner will receive a certificate. If only one school in a county participates, then the School winner is automatically the County winner.

County winner: Chosen by the RTA Local President and/or Unit. Each County winner will receive a certificate and embossed cover. If there is only one county in the District, then the County winner is automatically the District winner.

District Winner: Chosen by KRTA District President and/or officers. Each District winner will receive a plaque and a $50 award.

State Winner: Chosen by a panel of state level KRTA and AARP officials. The state winner will receive a plaque, a $100 award and an expense paid trip (by AARP) to the KRTA Convention. The winning student’s teacher will receive a check for $150 towards school supplies.
AARP/KRTA Grandparent Essay 2022-23

Student Information
Student Name (as it should appear on award): ________________________________

Parent/Guardian: ___________________________ Phone: ___________________________

School Information
Name of school: ______________________________ Word Count (300-500): __________

School Address: ____________________________ City: __________ Zip: __________

School Phone: __________ Teacher Name (First & Last): ___________________________

** In appreciation of including students in our contest, this teacher will be automatically entered in a special
drawing for $150 towards the cost of school supplies.

In order to compete at the County level, both steps must be completed by December 15th:

1) Complete the form online at www.aarp.org/kygrandparentessay
   *Must be completed to receive certificate and continue to county level.
   Local essay chairperson should verify this step has been completed.

2) Mail this form and handwritten essay to the local RTA contact listed below.
   DO NOT MAIL THE ORIGINAL ESSAY TO THE AARP OFFICE.
   Unless notified otherwise, AARP Kentucky will mail certificates for the school winner and participating school
   directly to the school teacher for presentation.

Local RTA President/Chairperson Information (Fill out your information before leaving it with the school)
Name: ________________________________

Address: ________________________________ City: __________ Zip: __________

Phone: __________ Email: ________________________________

DEADLINE: DECEMBER 15, 2022

All entries become the property of AARP Kentucky and KRTA who reserve
the right to print said entries in AARP/KRTA news releases and publications.
All information is governed by AARP and KRTA’s privacy policies.
For contest questions, please call Aneshia Gray at 502-394-3441 or email agray@aarp.org.
AARP/KRTA Grandparent Essay 2022-23

COUNTY WINNER

County: ________________

Student Information
Student Name (as it should appear on award): ____________________________________________

Parent/Guardian: ____________________________ Phone: _________________________________

School Information
Name of school: ___________________________________________ Word Count (300-500): ______

School Address: ___________________________________________ City: _______________ Zip: ______

School Phone: ____________________________ Teacher Name (First & Last): _____________________

In order to compete at the District level, both steps must be completed by January 31st:

1) Make a copy of this form and mail it to:
   Aneshia Gray
   AARP Kentucky
   10401 Linn Station Road, Suite 121
   Louisville, KY 40223

2) Mail the original form and handwritten essay to your District RTA President.
   DO NOT MAIL THE ORIGINAL ESSAY TO THE AARP OFFICE.

Unless notified otherwise, AARP Kentucky will mail a framed certificate for the county winner directly to the Local RTA President for presentation. Please send copies of any photos, newspaper clippings and other publicity from the presentation. A sample news release is attached to assist you with that task.

Local RTA President/Chairperson Information
Name: ________________________________________________

Address: ___________________________________________ City: _______________ Zip: ______

Phone: ____________________________ Email: ________________________________

DEADLINE: JANUARY 31, 2023

All entries become the property of AARP Kentucky and KRTA who reserve the right to print said entries in AARP/KRTA news releases and publications. All information is governed by AARP and KRTA’s privacy policies. For contest questions, please call Aneshia Gray at 502-394-3441 or email agray@aarp.org.
AARP/KRTA Grandparent Essay 2022-23

Student Information

Student Name (as it should appear on award):

Home Address: City: Zip:

Parent/Guardian: Phone:

Name of Grandparent Nominated (as it should appear on award):

In order to compete at the State level, the original winning District essay must be attached to this form and mailed by March 1st to:

Aneshia Gray
AARP Kentucky
10401 Linn Station Road, Suite 121
Louisville, KY 40223

AARP KY will mail a plaque and $50 check for the District winner directly to the District or Local RTA President/Chairperson designated below. Because these awards take more time to process than certificates, they must be mailed out between March 20th and April 1st. Please make arrangements for presenting them to the District winner sometime after April 1st.

When you make your presentation, please send copies of any photos, newspaper clippings, and other publicity from the presentation. A sample news release will accompany the plaque to assist you with that task.

RTA District or Local President/Chairperson Information (who will make presentation to winner)

Name:

Street Address (NO PO BOXES – Shipping FedEx):

City: Zip:

Phone: Email:

DEADLINE: MARCH 1, 2023

All entries become the property of AARP Kentucky and KRTA who reserve the right to print said entries in AARP/KRTA news releases and publications. All information is governed by AARP and KRTA’s privacy policies. For contest questions, please call Aneshia Gray at 502-394-3441 or email agray@aarp.org.
NEW RETIREE RECOGNITION PROGRAM

EXPLANATION

The KRTA will reimburse the local association $15 for each new retiree who attends a luncheon, dinner, or reception held by the local association in recognition of the new retirees.

This event may be a special meeting held solely for this purpose or a regular meeting where a special invitation is given to new retirees and they are recognized in a significant way.

To receive reimbursement, the local president should complete the form on the following page (Form 5B) and mail it to the KRTA office after the meeting takes place.

During these meetings, new retirees should be introduced to KRTA and given an opportunity to sign an automatic dues deduction card. The KRTA office will provide you with Membership Brochures, ADD cards, and other needed materials upon request. If you are planning such an activity and have questions, please call 1-800-551-7979.

Funds for this event will be available annually (fiscal year is July 1-June 30). In addition to new retirees, locals may invite other non-members who have not previously attended a Recognition Program.

This kind of activity has worked well in local associations where it has been tried. You are encouraged to take advantage of this opportunity.
NEW RETIREE RECOGNITION PROGRAM

REIMBURSEMENT FORM

LOCAL ASSOCIATION

DATE

NEW RETIREES IN ATTENDANCE:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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________________________________________________________________________

DESCRIBE BRIEFLY THE KIND OF MEETING (LUNCHEON, DINNER, RECEPTION, ETC.) HELD AND THE PROGRAM PRESENTED. WE WOULD APPRECIATE A COPY OF THE PROGRAM AND/OR AGENDA IF AVAILABLE.
No. of New Retirees in Attendance

No. of ADD Cards Signed and Returned:

<table>
<thead>
<tr>
<th>Name of Local Association</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Unit President’s Signature</td>
</tr>
</tbody>
</table>

---

Phone Number

Please return reimbursement check to the following person:

<table>
<thead>
<tr>
<th>Name</th>
<th>Street &amp; Number or Box &amp; Route</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>State</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Return completed form to: Kentucky Retired Teachers Association
7800 Leaders Lane
Louisville, KY 40291-3234

6/25/09
# 2022 KRTA Fall Workshop Schedule - Draft

<table>
<thead>
<tr>
<th>DISTRICT</th>
<th>DATE</th>
<th>DISTRICT</th>
<th>PLACE</th>
<th>CONTACT PERSON</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jefferson County</td>
<td>Fri. Aug 26</td>
<td>Jeff</td>
<td>Wildwood Country Club 5000 Bardstown Rd., L</td>
<td>Susan Thurman</td>
</tr>
<tr>
<td></td>
<td>10:00 AM (ET)</td>
<td></td>
<td>Louisville</td>
<td>1134 Blackthorn Rd Louisville, KY 40299 502-386-2555</td>
</tr>
<tr>
<td>Central Ky East</td>
<td>Mon. Aug 29</td>
<td>CKE</td>
<td>Boone Tavern</td>
<td>Pam Canter</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td>Berea</td>
<td>1175 Perry Rogers Rd Lancaster, KY 40444 850-339-8938</td>
</tr>
<tr>
<td>Central Ky West</td>
<td>Tues. Aug 30</td>
<td>CKW</td>
<td>Scott County Public Library 104 Bradford Ln</td>
<td>Lisa Petrey-Kirk</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td>Georgetown, KY 40324</td>
<td>5001 Chaplin Rd Willisburg, KY 40078 502-680-0740</td>
</tr>
<tr>
<td>Northern</td>
<td>Wed. Aug 31</td>
<td>Northern</td>
<td>Gardens of Park Hills 1622 Dixie Hwy, Park</td>
<td>Lori Flerlage</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td>Hills KY</td>
<td>1000 Independence Pike Dry Ridge, KY 41035 859-824-4882</td>
</tr>
<tr>
<td>Fifth</td>
<td>Thurs. Sep 1</td>
<td>5th</td>
<td>Shelbyville Conference &amp; Welcome Center</td>
<td>Cassandra McBurney</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td></td>
<td>715 Ghent Eagle S Sanders, KY 41083 502-347-5587</td>
</tr>
<tr>
<td>First</td>
<td>Mon. Sep 12</td>
<td>1st</td>
<td>Kenlake State Park</td>
<td>Sandra Rudolph</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (CT)</td>
<td></td>
<td>Hardin</td>
<td>415 Barnett Rd Eddyville, KY 42048 270-601-1525</td>
</tr>
<tr>
<td>Second</td>
<td>Tues. Sep 13</td>
<td>2nd</td>
<td>Madisonville Community College 2000 College</td>
<td>Susan Weatherford</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (CT)</td>
<td></td>
<td>Drive Madisonville, KY 42431</td>
<td>1290 College Dr Madisonville, KY 42431 270-836-7641</td>
</tr>
<tr>
<td>Third</td>
<td>Wed. Sep 14</td>
<td>3rd</td>
<td>Barren River State Park Lucas</td>
<td>Linda Pitcock</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (CT)</td>
<td></td>
<td></td>
<td>4982 Gamaliel Rs Tompkinsville, KY 42167 (270) 427-1227</td>
</tr>
<tr>
<td>Fourth</td>
<td>Thurs. Sep 15</td>
<td>4th</td>
<td>HCS - EC3 Center</td>
<td>Patty Evans</td>
</tr>
<tr>
<td></td>
<td>8:30 AM (CT)</td>
<td></td>
<td>Elizabethtown</td>
<td>1137 Cave Rd Campbellsville, KY 42718 270-469-5840</td>
</tr>
<tr>
<td></td>
<td>9:30 AM (ET)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle Cumberland</td>
<td>Mon. Sep 19</td>
<td>MC</td>
<td>Lake Cumberland State Park Jamestown</td>
<td>Tishana Cundiff</td>
</tr>
<tr>
<td></td>
<td>8:30 AM (CT)</td>
<td></td>
<td></td>
<td>11181 South KY 501 Liberty, KY 42539 606-303-1132</td>
</tr>
<tr>
<td></td>
<td>9:30 AM (ET)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upper Cumberland</td>
<td>Tues. Sep 20</td>
<td>UC</td>
<td>Pine Mountain State Park Pineville</td>
<td>Paula Adams/Sherry Skaggs</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td></td>
<td>340 Greers Chapel Road Harrogate,TN 37752 432-869-8496</td>
</tr>
<tr>
<td>Upper Ky River</td>
<td>Wed. Sep 21</td>
<td>UKR</td>
<td>Buckhorn State Park</td>
<td>Karen Griffith</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td>Buckhorn</td>
<td>20 Twin Cedar Rd Jackson, KY 41339 606-568-0113</td>
</tr>
<tr>
<td>Big Sandy</td>
<td>Thurs. Sep 22</td>
<td>Big Sandy</td>
<td>Jenny Wiley State Park Prestonsburg</td>
<td>James Morgan Chapman</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td></td>
<td>387 Walters Rd Pikeville, KY 41501 606-432-8648</td>
</tr>
<tr>
<td>Eastern</td>
<td>Fri. Sep 23</td>
<td>Eastern</td>
<td>Carter Caves State Park</td>
<td>Ann Porter</td>
</tr>
<tr>
<td></td>
<td>9:00 AM (ET)</td>
<td></td>
<td></td>
<td>P.O. Box 88 Washington, KY 41096</td>
</tr>
</tbody>
</table>

All workshop start times are local time. Registration (except Jefferson) begins 30 minutes prior to start time. Registration at Jefferson begins 1 hour prior to start time.
COMMITTEE RESPONSIBILITIES

Committees are the means by which members serve the community and the local RTA, develop friendships, and provide visibility for the local association. The appointment of committee chairpersons is generally the responsibility of the president.

Committees can be standing (functioning throughout the year) and special or ad hoc (functioning only as needed or to serve a new or special function). The number of committees varies from six to ten or more, depending on the needs and size of the local association.

It is advisable to involve as many members as possible in committee work. The president is an ex-officio member of all committees; however, the vice-president and/or president-elect could serve as coordinator of the committees.

The one-person committee should be avoided. At least one additional committee member should be able to take on an assignment if the chairperson is absent or otherwise unable to serve.

**Responsibilities of the Chairperson**

1. Recruit committee members.
2. Hold regular meetings with or make regular contact with committee members.
3. Develop, with the committee, goals and a plan for the year.
4. Delegate specific tasks to committee members.
5. Motivate committee members to do the work of the committee.
6. Work with other committee chairpersons to see that overlapping topic areas are well coordinated.
7. Write committee reports for the Local President, Executive Committee, and the membership.
8. Present committee reports at local RTA meetings.
9. Communicate with the KRTA to coordinate state and local committee goals.
10. Attend KRTA and/or District sponsored workshops as designated.
MEMBERSHIP COMMITTEE RESPONSIBILITIES

The purpose of the Membership Committee is to recruit, retain and regain members for the local and district RTA and KRTA. For its success, the cooperative support of all officers and the general membership is needed.

Specific Suggestions

1. Meet regularly to update membership rolls according to revisions made at the KRTA office.

2. Develop a membership campaign. (Teachers retire every month; get updates from the KRTA office).
   - Step 1: Set membership goals.
   - Step 2: Know your prospective members.
   - Step 3: Develop a list of reasons for joining the local and state associations.
     (Adapt available materials for your needs).
   - Step 4: Develop methods for contacting prospective members.
   - Step 5: Retain members who have belonged.
   - Step 6: Report on and evaluate the campaign.

3. Introduce the membership campaign to the local membership and enlist their assistance.

4. Use membership recruitment materials contained in this *Local President’s Handbook* and call the KRTA office for other materials that may come available.

5. Call the KRTA office for updated membership lists and mailing labels.

6. Be informed! The better informed you are about the benefits of belonging the better “ambassador” you will be!

7. Encourage the general membership to make personal contacts with new retirees whenever possible.

MEMBERSHIP/PRE-RETIREMENT COMMITTEE CO-CHAIRS

Betty Hester  
196 Grand Oak Blvd  
Shepherdsville, KY 40165  
502-957-230 or 502-494-91145  
hester.bettydon69@aol.com

Debby Murrell  
2805 Alice Avenue  
Louisville, KY 40220  
502-458-5125 or 502-387-7472  
dasailboat@msn.com
KRTA
LOCAL MEMBERSHIP LIST CORRECTION

LOCAL ASSOCIATION ____________________________ PRESIDENT ____________________________
ADDRESS ____________________________ PHONE ____________________________

KRTA prepares lists per county of retirees who are potential members of KRTA. Each is listed according to the location of his/her post office address; however, for professional and/or personal reasons, some may prefer to be listed elsewhere.

**TO MAKE SUCH A CHANGE:**
1. Confirm the desired change with the retiree.
2. Notify the other association of retiree’s choice.
3. Complete SECTION I below and mail it to the KRTA office.

<table>
<thead>
<tr>
<th>NAME</th>
<th>OMIT FROM COUNTY</th>
<th>ADD TO COUNTY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

The local may request the removal of a name from their list to Not Interested list if the reason is appropriate. Some reasons may include being retired for 10 or more years and has never been a member, incapacitated, living out of state or other. Please use SECTION II.

<table>
<thead>
<tr>
<th>NAME</th>
<th>REASON FOR OMITTING</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
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</tbody>
</table>

Upon completion, please return this form to the KRTA office, 7800 Leaders Lane, Louisville, KY 40291-3234
SAMPLE MEMBERSHIP SOLICITATION LETTERS

The following paragraphs are examples that may be used in solicitation letters. Your local will want to revise them according to your own situation and print them on your own local or personal stationery.

Congratulations on your (upcoming) retirement. You have good reason to be proud of your years as an educator, and we think you will want to maintain your professional ties by joining your retired colleagues in the ________ Retired Teachers Association.

As a member, you will enjoy keeping in touch with other retired or former teachers through lively (monthly/quarterly) meetings and special recreational events. You will find opportunities for involvement in meaningful service projects that benefit both the membership and the community. You will be offered stimulating programs on such topics as crime prevention, physical fitness, income tax savings, consumer awareness, and safe driving.

At this time why not also consider joining the Kentucky Retired Teachers Association. KRTA speaks up for our benefits and welfare at the state and national levels. You can add your voice to this effort by joining both organizations today. All you need do is return $____ for the local and the Automatic Dues Deduction card for KRTA (for automatic deduction of the $20 from your November annuity check). KRTA membership on a cash basis is also an option.

You are invited to be a guest at a meeting of the ________ RTA on ________ at _____________ in ____________. We plan a luncheon and presentation on _________________. Please join us.

Recently, President __________ of the ________________ RTA wrote inviting you to join our organization.

We hope that your silence means only that you haven’t had time to fill out your application. We urge you once again to join your colleagues in an organization that offers a chance to enjoy congenial company and the opportunity for many meaningful projects and programs to enrich your life, as well as open communication for needed information on legislation and health/insurance concerns.

Please let me hear from you today.
The purpose of the Legislative Committee is to provide leadership to the general membership in promoting and monitoring legislation that will affect the members and all older persons. By taking a stand on community issues, this committee can effectively mobilize support for legislation at local, state, and national levels of government by communicating to local members the importance of a strong response to legislative issues at each of these levels. The Committee then serves to inform the membership of current legislative issues/concerns and updates them on the State Legislative Program. (See Legislative News on the KRTA website www.krta.org).

Specific Suggestions

1. Meet regularly to update committee members on the status of current issues.

2. Develop a plan to gain knowledge, disseminate information, and make contacts with legislators.
   - Step 1: Establish the key issues.
   - Step 2: Develop a plan for legislative action.
   - Step 3: Implement the plan.
   - Step 4: Report on and evaluate the local legislative activity.

3. Introduce the legislative plan to the local membership and enlist their assistance, (a working session for letter writing, for instance).

4. Use materials contained in this Local President’s Handbook and call the KRTA office for other materials that may come available.

5. Become knowledgeable about the legislative process, the issues at hand, and the most effective means of participating in the process.

6. Encourage the general membership to establish rapport with legislators and other key figures in government. Establishing a local presence in your county and/or city can gain success in advocacy for seniors and retired educators.

Ideas for Legislative Program Projects

1. Organize or participate in voter registration drives.

2. Hold panel discussions and invite spokespersons from all political parties to participate.

3. Organize a letter writing campaign to support or oppose specific legislation. (See Communicating with Members of the General Assembly Form 12 and The Right and the Wrong Way to Write to Legislators Form 13).

4. Visit the state capital with a specific purpose in mind. (See How to Visit Your Legislator Form 14).

5. Organize or participate in a legislative phone network.

KRTA LEGISLATIVE COMMITTEE CO-CHAIRS

<table>
<thead>
<tr>
<th>Allen Schuler</th>
<th>Larry Woods</th>
<th>Marshall Ward</th>
</tr>
</thead>
<tbody>
<tr>
<td>6420 Villa Spring Dr.</td>
<td>1427 Kemper Lane</td>
<td>1308 Oak Hill Dr.</td>
</tr>
<tr>
<td>Louisville, KY 40291</td>
<td>Lancaster, KY 40444</td>
<td>Murray, KY 42071</td>
</tr>
<tr>
<td>(502) 239-1559</td>
<td>(859) 742-1377</td>
<td>(270) 293-9041</td>
</tr>
<tr>
<td><a href="mailto:Satrer31@twc.com">Satrer31@twc.com</a></td>
<td><a href="mailto:lkwx3@windstream.net">lkwx3@windstream.net</a></td>
<td><a href="mailto:josephmarshallward@gmail.com">josephmarshallward@gmail.com</a></td>
</tr>
</tbody>
</table>
COMMUNICATING WITH MEMBERS OF THE GENERAL ASSEMBLY

Each legislator has the responsibility to represent you and your interests at the state level, regardless of how you voted.
They cannot represent you, however, if they do not know your positions on the issues at hand.
The following is a list of general tips on how to communicate with Kentucky legislators.

Do's:

Do identify clearly the subject or subjects you are interested in, not just House and Senate bill numbers. Remember, it is easy to get a bill number wrong.

Do state why you are concerned about an issue or issues. Your own personal experience is excellent supporting evidence. Explain how you think an issue will affect your business, profession, community, or family.

Do put your thoughts in your own words. This is especially important if you are responding to something you read. If a member of the General Assembly receives numerous letters with nearly identical wording, he or she may discount them as part of an organized pressure campaign. Even so, pressure campaigns have worked when mail was so voluminous that it had to be weighed rather than read.

Do establish relationships with your own representative and senator. In general, you’ll have more influence as a constituent. If you don’t know whose district you are in, check the map in the enclosed 1990 Legislative Directory.

Do communicate while legislation is being considered by legislative committees and subcommittees as well as when it is on the House or Senate floor.

Do find out which committees and subcommittees your representative and senator serve on. Members of the General Assembly have much more influence over legislation within their committees’ and subcommittees’ jurisdiction.

Don’ts

Don’t ever, ever threaten. Don’t even hint “I’ll never vote for you unless you do what I want.” Present the best arguments in favor of your position and ask for the legislator’s consideration. You needn’t remind a legislator of the electoral consequences. Mail and phone calls will be counted without your prompting.

Don’t pretend to wield vast political influence. Write members as a constituent, not as a self-appointed spokesperson for your neighborhood, community, or industry. However, if you really are a spokesperson for a group, be sure to mention it.

Don’t use trite phrases or cliches. They can make your letter sound mass-produced when it isn’t.

Don’t become a pen pal. Some legislative offices don’t bother to count mail from seemingly tireless letter-writing constituents.
THE RIGHT WAY & THE WRONG WAY TO WRITE TO LEGISLATORS

The Wrong Way

Legislators like to know what company or organization you represent: write on your letterhead.

Date missing.

Senators, like the rest of us, like their names spelled correctly.

"The Honorable," please.

He's in Room 1620.

Senators prefer to be called "Senator"

Don't criticize; if you do, the Senator probably won't read past the first sentence.

Why should the bill be passed? Be specific!

The Right Way

Always date your correspondence.

Be respectful.

Give specific, practical reasons.

Add a personalized reason.

Be polite and appreciative.

Senator John D. Public
Room 1662
Senate of Kentucky
Frankfort, Kentucky 40604

Dear Mr. Public:

The Kentucky Legislature has in the past done some stupid things, but your failure to pass Senate Bill 1984 is almost incredible.

The bill, which would require all tobacco covers to be made of plastic, has been passed by the legislatures of Wyoming and Alaska and is under consideration by the legislature of several other states.

Why can't Kentucky be first for once?

Yours very truly,

John Doe

The Kentucky Network

600 Cooper Drive
Lexington, KY 40502-2296
(602) 233-3000

Kentucky Chamber of Commerce
P.O. Box 817 • Frankfort, KY • 40602 • (502) 695-4700
A face-to-face meeting with your legislators, whether at the local, state or federal level, can be a highly effective way to transmit your views. As with many other cases where you must ask for support, a personal appeal is often the best method to use in communicating with a lawmaker. Visits might be made:

1. to introduce your group to your legislator prior to making contact on specific bills,
2. to acquaint a legislator with your views,
3. to seek support for or opposition to a specific bill or provision, and/or
4. to demonstrate public support for a measure by participating in a “mass lobbying” effort in which members of one or more groups simultaneously descend on the legislature. (Note: This tactic may irritate some lawmakers, but it can demonstrate your strength and get your point across.)

ACTION CHECKLIST

Preliminaries: Planning the Visit

1. Make an appointment in advance. Make clear that you want to discuss issues. Specify alternative times and dates. If you find yourself in your capitol city with some spare time, stop in your legislators’ offices anyway. If lawmakers are in, they may interrupt their work long enough at least to greet you, but chances are they will not have time for a substantive discussion. You should also chat with an aide. Staff members can be of great assistance.

2. Time your visit to have maximum impact on the issues about which you’re concerned:
   - Try to reach legislators before their opinions have been solidified and they have taken public stands on issues;
   - If you’re trying to reinforce earlier work or to influence a vote, plan your visit for shortly before the vote, but choose the right vote to discuss. A committee vote or a vote on an amendment may be more important than the vote on final floor passage.

3. Be aware of legislators’ schedules so you can visit when they are most likely to be available:
   - Important legislative business is usually conducted Tuesday through Thursday, freeing lawmakers for long weekends back home;
   - Often, a good time to find legislators in their office is early or late in the day, before or after committee meetings and legislative sessions;
   - If you cannot see lawmakers in their office, you may call them off the floor or out of a meeting. Unless an important vote is under way or imminent, they should be able to see you briefly;
   - The closing days of a session are hectic and not usually advised for a legislative visit. If, however, consideration of a measure about which you are concerned was postponed until the end of the session, you may want to join the confusion;
   - Legislators have large constituencies, especially United States Senators, and are relatively hard to see personally. (see item 6 below.)
4. Plan your interview in advance:

1' Research your legislators
   • look for actions you can praise, and
   • study their voting record so you can talk specifically about positions.

1' Research your subject(s)
   • obtain background information from other organizations which may be interested in the issue,
   • look for specific examples you can cite to show the significance of the subject and the concerns of voters,
   • learn the positions of other groups on the issue. Know who supports and who opposes action you advocate, and
   • find out what specific legislation related to your issue is pending (with bill numbers, if possible).

5. Reconfam your appointment just before you plan to set out for the legislator’s office. Legislators’ schedules are subject to many last-minute changes, and you may have to change the time you have set.

6. Plan to meet with key staff assistants in addition to, or instead of, the legislator. Legislative and administrative assistants are most important conduits for your views. If you impress or persuade them, they will help “sell” your position to the legislator. They may also be more accessible for follow-up contacts.

7. Prepare some written materials you can leave behind at the end of your visit. Get reprints of relevant articles and position papers, or prepare a memo or short fact sheet summarizing your main concerns.

Doing it: The Visit

1. Be on time and don’t overstay. Get down to business quickly. Legislators have many demands on their time. Unless you have made special arrangements in advance, plan to get all your points across in ten to twenty minutes.

2. Adopt a friendly, constructive, positive attitude rather than a hostile, belligerent, or uncompromising one. Never threaten. Avoid arguments. Leave legislators with a friendly feeling, even if he turns down your request for support.

3. Mention areas of agreement. Commend the legislator for past actions or announced positions of which you approve.

4. Back up your views with specific, personal examples to show legislators how the issues affect their constituents. Factual reports of what others “back home” are thinking carry a lot of weight with most legislators.

5. Give legislators a chance to talk. You may be surprised at what they know and are interested in learning about.

6. Ask legislators to do some specific things like sponsoring bills, voting for or against pending measures, meeting with your group when they return home, or introducing you to other legislators interested in your issue. Legislators generally like to be of service to constituents in this way.
7. Try to prevent legislators from committing themselves against your position. Leave them undecided rather than committed to the opposing view. If you leave the door open, you may be able to win their support with a better argument you find.

8. Give the legislators some written materials summarizing your main points. Don’t assume they have seen articles you have. If they want further information, offer to provide it.

9. Try to meet the legislator’s key assistants while you are in their office.

**Evaluation and Follow-up**

1. Write legislators to thank them for their time, to remind them of anything they may have agreed to do and to send them any additional information.

2. Report to your group on the results of your meeting. Share any insights you gained about the legislator’s attitude and concerns. Make sure private comments are not prematurely publicized, however.

3. Develop an ongoing relationship with the legislator through additional visits and correspondence:
   - invite legislators to meet with your group; and
   - keep them informed of developments related to the subject of your visit. Send news clippings or other information that may bolster your arguments.
The purpose of the Health & Insurance Committee is to secure, review, and distribute information pertaining to health and insurance, including maintaining a healthy lifestyle. This could include the presentation and interpretation of issues concerning the following:

1. State insurance program for retirees under 65
2. TRS insurance program for retirees 65 and over
3. Medicare B for retirees 65 and over
4. Social Security issues for retirees who qualify
5. Long-Term Care Insurance
6. KRTA Endorsed Delta Dental Insurance Programs
7. KRTA Endorsed Avesis Vision Plan
8. KRTA Endorsed Hearing Instrument Plan
9. Research and legislation to improve the quality of physical and mental health services
10. Coping with a complex health care system
11. Adoption of healthier lifestyles
12. Empowerment of retirees to actively participate in their own health care

**Specific Suggestions**

1. Meet regularly to update committee members on the status of current issues.
2. Develop a plan to gain knowledge and disseminate information to membership
   - Step 1: Identify needs. Find out what members need to know about health care issues.
   - Step 2: Determine local resources—time required, magnitude of needs (what committee thinks is most important), special skills required for programs.
   - Step 3: Select a program or project. (Refer to KRTA Health/Insurance Committee Reports)
   - Step 4: Conduct the program or project.
   - Step 5: Evaluate the program or project.
3. Introduce the plan to the local membership and enlist their assistance.
4. Call the KRTA office for information on the state insurance program, brochures describing the insurance benefits available, and health care forms/documents.
5. Designate a committee member for each category of concern; i.e., dental, long-term care insurance, etc.

**HEALTH & INSURANCE COMMITTEE CO-CHAIRS**

Margaret Sims  
145 Castleton Drive  
Bardstown, KY 40004  
(502)349-0055  
Msims4949@yahoo.com
Meetings:
At the Senior Citizens Center, 124 Smith Lane, Smithton, on the second Tuesday of September, December, March, and June. The Social Hour begins at 10:00 a.m., the Business Meeting at 10:30 a.m. and Lunch at 12:00 noon. Meetings are open to all interested retired, former and active educators.

Purposes:
To help Brown County retired educators . . .

... achieve retirement lives of purpose, dignity, and independence
... undertake voluntary projects of benefit to the community
... be informed about issues of interest; such as, insurance, legislation, Medicare, social security

Started: April 9, 1976

Present Active Membership: 152

Membership Information: Regular membership is open to all former or retired educators. Associate membership is open to spouses. Dues are $5 per year payable by July 1.

Community Service Projects:
1. Annual donation of school and personal supplies for the Special Education students of Brown County Schools.
2. With Our Youth! Promising New Opportunities! - Three-year national project in affiliation with NRTA. Volunteer hours with the youth of our community (reading, classroom assistance, mentoring, etc.) are tallied and forwarded to NRTA in support of President Clinton’s 1997 Summit on Education.
3. Connections for Independent Living - In affiliation with AARP, projects are developed to help our seniors remain in their homes. The first project involved providing the membership with copies of the “Brown County Senior Citizens Information Guide” and distributing copies to the churches in the county.
4. The Brown County Relay for Life - Teams participate in the annual cancer drive held each May.

Retirement Planning Program:
The Kentucky Teachers Retirement System provides a workshop for active teachers in the District to help them plan for retirement. In conjunction with the District leadership, assistance and refreshments are provided.

Informative, Protective Service, and Other Programs:
Quarterly meetings feature guest speakers on a variety of subjects, including information on insurance, legislation, and membership. Lunch is served each meeting for a nominal charge. New retirees are honored with lunch and a token of congratulations at the June meeting. Honorariums are presented for deceased members as appropriate.

President: J. R. Smith, 500 East Second St., Smithton
SAMPLE MEETING AGENDA

10:00 Social Time
10:30 Welcome ....................... J. R. Smith, President
10:33 Pledge
10:35 Devotional .......................... M. Clark
10:40 Minutes & Correspondence ...... Betty Brown, Secretary
10:43 Financial Report ............... Jim White, Treasurer
10:45 Announcements ............... J. R. Smith
10:50 Committee Reports
   Caring ................................ Darlene Stone
   Health/Insurance ...................... Leon Rollins
   Membership .......................... Betty Luther
   Community Service .................. Helen White

With Our Youth!
Connections for Independent Living
Relay for Life

   Scholarship  ....... Vernon James.
   Chairperson

11:25 Memorial Tribute ................ J. R. Smith

   Yvette Young

11:30 Introduction of Guest ............... J. R. Smith

   Debby Murrell
   KRTA Membership Chair

11:50 Door Prizes ....................... Jane Jones
12:00 Lunch

Acknowledgments

A special thank you to Bud and Anna Rhea Settles, Kenny and Wanda Lutes and the Senior Citizens Staff for allowing us to use their building once again and for preparing another delicious meal.
FOR IMMEDIATE RELEASE

The Brown County Retired Teachers Association will meet at 10:00 a.m. on Thursday, September 8, at the Senior Citizens Center in Smithton. Guest Speaker Bob Jones will present a KRTA Legislative Update. Lunch will be served at 12 noon. All retired educators are welcome to attend.

FOR IMMEDIATE RELEASE

The Brown County Retired Teachers Association and the First District Retired Teachers Association will host the Pre-Retirement Seminar presented by the Teachers Retirement System of Kentucky on Saturday, October 1, at Smithton High School, Preston Hwy., Smithton. The workshop is open to active teachers who are seeking assistance in retirement planning. It is never too early to begin planning for this important period of life. The seminar runs from 8:30 a.m. - 12:00 noon.
DELEGATES TO THE 2023 KRTA DELEGATE ASSEMBLY

PRESIDENT: ____________________ LOCAL ASSOCIATION: ____________________
DISTRICT: ____________________

NUMBER OF STATE KRTA MEMBERS: ____________________ (1 delegate per 50 members)

MAXIMUM NUMBER DELEGATES YOUR LOCAL ASSOCIATION MAY SEND: ______

THE NAMES OF OUR DELEGATES TO THE 2023 KRTA DELEGATE ASSEMBLY ARE AS FOLLOWS:

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SIGNED BY PRESIDENT

PRESIDENT'S TELEPHONE NUMBER

Return to Greg Roush, Kentucky Retired Teachers Association, 7800 Leaders Lane, Louisville, KY 40291.

This form MUST BE RETURNED WITH A CHECK FOR DELEGATES’ REGISTRATION FEES ($37 PER DELEGATE) to KRTA no later than March 15, 2022.

CHECK AMOUNT $_________ CHECK #_________
KRTA VOLUNTEER*

PROGRAM
January 1 - December 31

✓ Ask your local association members to keep a record of volunteer hours; e.g., nursing homes, assisted living facilities, schools, hospitals, etc.
✓ Total the hours—break into two categories
  • Total volunteering of any kind
  • Total volunteering with youth
✓ Report on the Local Association Recognition Program Form (Form 3) in Item 18.

What is a Volunteer?
A volunteer is a person that has a spirit of service, creativity, sensitivity for human pain, strong moral values, the ability to work in a team, and a social conscience. They practice solidarity, leadership, good interpersonal relationships, discipline, communication skills, and care for themselves and others.

What is Volunteer Work?
Formally, volunteer work is work done not for profit. It contributes to a greater cause that is for the good of one’s fellow man and society in general.
Reasons to Volunteer!

Reasons that are ideological, ethical, and moral; that reveal a sense of the needs and problems of others. To better society, change situations and transform the world.

Personal reasons: to feel useful, to know and live new experiences, to develop as a person, to build relationships, and to work with others.

Recognition Programs for Volunteers

♦ Frank R. Hatfield Volunteer of the Year Award - Based on Uniqueness of Service

Local RTAs are encouraged to submit the name of an outstanding volunteer based on uniqueness of service to the District RTA by February 12, 2018. Each District will then select one candidate whose name will be considered for the Frank R. Hatfield Volunteer of the Year Award and send it to the KRTA Office by March 5, 2018. This award has been designed to celebrate volunteerism by retired teachers. Our members have tremendous impact through invaluable service to their communities across the Commonwealth. For more information please see page 45.
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Name__________________________ Grand Total of Volunteer Hours (January 1 - December 31)
Frank R. Hatfield Volunteer of the Year Award

➢ Established in 2009

➢ Criteria:
  • Uniqueness of one volunteer activity for which no pay was received
  • Hours and/or materials donated to the one volunteer activity
  • Benefit of the one volunteer activity to recipient(s)

➢ Timeframe:
  At a minimum, the one volunteer activity should encompass January 1st thru December 31.
  The one volunteer activity, however, could be since retirement or a lifetime.

➢ Submission Deadlines:
  • Local RTA- submits name of candidate and a one page (maximum) document describing the one volunteer activity to the District President by February 3.
  • In the one page document report what the volunteer did for the good of others. Also, “show” how the one volunteer activity is unique by describing the way in which the recipient(s) benefitted from the efforts of the volunteer.
  • District President establishes a district level committee to review and select a district winner.
  • District President submits the district winners name and supporting document to the KRTA office by March 15th.
  • KRTA officer in charge of the program convenes an Ad Hoc committee to select the state winner.

➢ Recognition at the Annual Convention of State winner and District winners.
INTRODUCING

LEARNING ABOUT KRTA
ARTICLE I. NAME

The name of the Association shall be the Kentucky Retired Teachers Association, referred to as KRTA.

ARTICLE II. PURPOSE

The purpose of the Association shall be:
1. To promote the economic, social, health, and professional interests of retired teachers.
2. To act on behalf of retired teachers in matters involving their needs.
3. To afford opportunity for the expression and interchange of opinions on matters of special interest to all retired teachers.
4. To aid and support worthy legislation and community efforts to improve public education.
5. To work with national and other state professional organizations on promoting membership and cooperating in legislative efforts.

ARTICLE III. MEMBERSHIP

1. Active Members: Any retired teacher, supervisor, or school administrator formerly employed in any school system or who receives retirement benefits from the Teachers Retirement System (TRS) of Kentucky may become an active member of the Association upon payment of the annual dues.
2. Associate Members: Any person interested in the welfare of KRTA may become an associate member upon payment of annual dues. Associate members are only eligible for program benefits and cannot hold an office or vote.
3. Honorary Members: Honorary membership may be extended to persons upon the approval of the Executive Council and has no voting privileges.

ARTICLE IV. GOVERNANCE

The Governing body of the Association shall consist of the following.
1. The Executive Board comprised of the President, President-Elect, Vice-President, and Immediate Past-President.
2. The Executive Council
3. The Delegate Assembly
Responsibilities of each group above are described in the By-Laws.
ARTICLE V. AFFILIATES

The association will approve affiliates and local districts and grant them authority as permitted by KRTA Constitution and By-Laws.

ARTICLE VI. AMENDMENTS

1. Amendments can be made by majority vote of the Delegate Assembly provided that the proposed amendment shall have been published in print or electronically at least one month prior to the meeting of the Delegate Assembly.
2. If information is disseminated with less than 30 days, two thirds vote of the Delegate Assembly is required.

ARTICLE VII. ADOPTION AND EFFECTIVE DATE

Upon adoption, the constitution shall become effective immediately.
ARTICLE I. OFFICERS

Section A. The Executive Board of the Association shall consist of the following officers: President, President-Elect, Vice-President, and Immediate Past-President.

Section B. Duties of the Officers.

1. The President
   a. The President shall be the executive officer of the Association and of the Executive Council. The term of office shall be for (1) year beginning July 1 and ending June 30 each year after the annual convention.
   b. The President shall carry out rules and regulations and policies as set forth by the Executive Council and the association as well as perform the duties prescribed by the Constitution.
   c. The President shall make an annual report to the Delegate Assembly.

2. The President-Elect
   a. The President-Elect shall serve as President if for any reason the President is unable to serve.
   b. The President-Elect shall automatically succeed and be deemed elected without convention vote, to the office of President.
   c. The President-Elect shall keep in contact with the district chairpersons giving help whenever possible.
   d. The President-Elect shall assist in formulating programs for the meetings and workshops and perform any other duties which the President or Executive Council may designate.

3. The Vice-President
   a. The Vice-President shall serve as President in the absence of the President and President-Elect.
   b. The Vice-President shall assist the President at such functions and times as requested by the President or Executive Council.
   c. The Vice President shall automatically succeed and be deemed elected without convention vote, to the office of President Elect.

4. The Immediate Past-President
   b. Shall be a member of the Executive Board for one year after serving as President.

ARTICLE II. EXECUTIVE COUNCIL

1. The Executive Council, hereafter referred to as the Council, shall consist of:
   a. The Executive Board consisting of the President, President-Elect, Vice-President, and the Immediate Past-President. The Executive Board shall act for the Association between meetings of the Council and in addition shall have sole responsibility for any matter expressly delegated to it by the Delegate Assembly or Council.
   b. Fourteen members to be elected at the District fall meeting for a term of two years (or until a successor has been duly elected), to take office on July 1 following the meeting at which they were elected. Council members shall be elected in the following manner: The First, Third, Fifth, Central Kentucky East, Upper Kentucky
River, Northern Kentucky, Big Sandy, and Central Kentucky West shall elect members for terms beginning in odd number years. The Second, Fourth, Louisville & Jefferson County, Middle Cumberland Upper Cumberland and Eastern Kentucky shall elect Council members for terms beginning in even number years. Council members may serve in succession for no more than two full terms.
c. The Executive Council nominees must be voted in by the District they represent and cannot hold any other paid or volunteer state level position.
d. All elected members of the Council shall each have full voting privileges.
2. The Council shall act for the Association ad interim. The President shall be chairperson of the Council and the Executive Director or designee shall serve as Secretary of said Council. The Council shall meet on the call of the chairperson or written petition to the chairperson signed by a majority of the Council members. A majority of the Council present at a meeting shall constitute a quorum for transacting business.
3. The Executive Council shall hold a minimum of two meetings per fiscal year. Meetings can be virtual or in person.
4. The Executive Council shall adopt rules and regulations for conducting its meeting and performing its functions in conducting the business of the Association.
5. In case of a vacancy, the District with the vacancy, will elect a member to fill the vacancy for the remainder of the term.
6. The Executive Council shall have the authority to employ and prescribe the duties of an Executive Director. Other staff members may be employed by the Council upon the recommendation of the Executive Director.
a. The Executive Director
   (1). The Executive Director shall be the Administrative officer of KRTA.
   (2). The Executive Director or designee shall take the minutes of the KRTA Delegate Assembly and the Executive Council and submit a copy to all parties concerned as soon as possible.
   (3). The Executive Director or designee shall keep on file in the KRTA office all minutes, communications, and committee reports.
   (4). The Executive Director or designee shall serve as the Editor of the KRTA Newsletter.
   (5). The Executive Director shall be evaluated annually by the Executive Council.
   (6). The Executive Director shall present an annual budget and be responsible to see that an annual audit is performed.

ARTICLE III. AFFILIATES

Section A. District Associations shall be approved by a majority vote of the members of the Executive Council.
Section B. Governance Affiliates
1. The District Associations shall be organized by counties as follows:
   d. Fourth District: Breckinridge, Grayson, Green, Elizabethtown/Hardin/LaRue, Hart, Marion, Meade, Nelson, Taylor, and Washington.
e. Fifth District: Bullitt, Carroll, Franklin (Capital City), Henry, Oldham, Owen, Shelby, Spencer and Trimble.
f. Louisville and Jefferson County
g. Central Kentucky West: Scott, Harrison, Woodford, Fayette/Bourbon (Bluegrass), Jessamine, Anderson, Mercer, Clark, Nicholas/Robertson and Boyle.
j. Big Sandy District: Lawrence, Magoffin, Johnson, Martin, Floyd, and Pike.
k. Middle Cumberland District: Adair, Casey, Clinton, McCreary, Pulaski, Russell, and Wayne.
l. Northern District: Boone, Bracken, Campbell, Gallatin, Grant, Kenton, and Pendleton.
m. Upper Cumberland District: Bell County/Pineville, Middlesboro Independent, Clay, Harlan, Knox, Laurel and Whitley.

ARTICLE IV. DELEGATE ASSEMBLY

1. The Delegate Assembly shall consist of the following:
   a. Members of the Executive Council.
   b. Local Association Delegates: At least one delegate for the first 50 members or any fraction thereof plus one additional delegate for each additional 50 members or major fraction thereof. No local association shall be entitled to more than 10 delegates.

2. Local Association Delegates must be a dues-paying member of the Association.

3. The local presidents of the local associations shall transmit to the KRTA Executive Director the names of the qualified delegates, not later than March 10 of each year.

4. The powers of the Delegate Assembly shall consist of the following:
   a. Approve the Vice President nominee
   b. Approve Legislative Agenda
   c. Receive reports from Executive Director, Standing Committees, and Special Reports
   d. Vote on recommended amendments to the constitution and bylaws
   e. Receive annual budget and audit report
   f. Vote on actions referred from the Executive Council
   g. If the Delegate Assembly is unable to meet in person, the Executive Board will prepare a plan to complete the objectives and the voting process of the convention.

ARTICLE V. DUES

The annual membership dues of the Association shall be approved by the Delegate Assembly as recommended by the Executive Council.

ARTICLE VI. VICE PRESIDENT NOMINATION

1. The District will elect a Vice-President nominee using the KRTA Presidential Rotation, by December 15 prior to the Delegate Assembly.

2. On or before December 15, before the annual convention, the President shall
appoint an interview Committee of five Past Presidents, not more than two from the Executive Council. This committee will meet with the District’s nominee to discuss the duties of KRTA officers and present the nominee to the Delegate Assembly.

3. If the District has not submitted a nominee, then the rotation continues.

4. The President shall present the Vice-President nominee to the Delegate Assembly.

5. The newly elected officer shall take office July 1 following the annual meeting.

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**ARTICLE VII. COMMITTEES**

1. Standing Committee Members are elected by Districts. Chairs and Co-Chairs of committees are appointed by the Executive Director and approved by the Executive Council. No person can be a member of more than one state committee.

Responsibilities of each committee will be published.

a. Legislative

b. Membership

c. Health & Insurance

2. Ad-Hoc Committees - Appointed by the President for a specific objective.

**ARTICLE VIII. TERMS OF OFFICE**

The term of office for President, President Elect, Vice President shall be one year, except where specified otherwise, or until their successors are elected or appointed.

**ARTICLE IX. QUORUM**

1. A quorum of the Delegate Assembly shall be a majority of its qualified registered delegates present.

**ARTICLE X. AMENDMENTS**

1. Amendments can be made by majority vote of the Delegate Assembly provided that the proposed amendment shall have been published in print or electronically at least one month prior to the meeting of the Delegate Assembly.

2. If information is disseminated with less than 30 days, two thirds vote of the Delegate Assembly is required.
ARTICLE XI. RULES OF PROCEDURE

The most recent edition of Robert's Rules of Order shall be the authority governing all matters of procedure not otherwise provided in the Constitution of these Bylaws.

ARTICLE XII. FISCAL MEMBERSHIP YEAR

The fiscal year of the Association shall begin July 1 and end June 30 of the following year.

ARTICLE XIII. ADOPTION AND EFFECTIVE DATE

Upon adoption, By-Laws shall become effective immediately.
2022-2023 KRTA OFFICERS

PRESIDENT
Golden Hale
(606) 634-9075
halegolden@yahoo.com

PRESIDENT ELECT
Steve Gillespie
(859) 582-1755
stkgillespie@gmail.com

VICE-PRESIDENT
Rick Tatum
(502) 649-7613
hrtatum@bellsouth.net

IMMEDIATE PP
William Kelley
(270) 766-7377
pbkelley1@comcast.net

KRTA EXECUTIVE DIRECTOR
Tim Abrams
(502) 231-5802
Tim.Abrams@krta.org

DEPUTY EXECUTIVE DIRECTOR
Greg Roush
(502) 231-5802
Greg.Roush@krta.org

EXECUTIVE COUNCIL

Tara Parker
(Jefferson Co.)
(502) 226-0219
tapa613@aol.com

Betty McKinney
(Northern)
(859) 322-7205
rogerbetty@live.com

Robert "Tate" Adams
(Eastern)
(606) 210-8283
robert.adams8181@gmail.com

Sue Crumpler (5th District)
(502) 395-1775
suecrumpler22@gmail.com

Martha Stepp (4th District)
(270) 405-3563
stepp_martha@scrtc.com

Janice Yonts (3rd District)
(270) 543-6429
janyonts@yahoo.com

Rebecca Brown (2nd District)
(270) 860-0986
beccabillbrown@att.net

Sandy Anderson
(1st District)
(270) 978-2574
seanderson@bellsouth.net

Mary Alice Hunt
(Big Sandy)
(606) 631-1951
maryalicehunt@bellsouth.net

Henrietta Sheffel
(Upper KY River)
(606) 398-2606
hsheffel@gmail.com

Cookie Henson
(Upper Cumberland)
(606) 598-6439
cookiehenson@gmail.com

Parthenia Wells
(Central KY West)
(502) 863-4012
wellsparthenia@gmail.com

Laura Gray
(Central KY West)
(859) 846-5652
icreate88@aol.com

Ann Upchurch
(Central KY East)
(859) 749-5805
annupchurch@ymail.com

Tishana Cundiff
(Middle Cumberland)
(606) 303-1132
tishana333@yahoo.com

AARP/KRTA Specialist
Cebert Gilbert, Jr.
(859) 227-9557
cgilb@bellsouth.net
KENTUCKY RETIRED TEACHERS ASSOCIATION
DISTRICT PRESIDENTS
2022-2023

FIRST
Sandra Rudolph
415 Barnett Rd
Eddyville, KY 42038
270.388-9375/270.691-1525
sandra@roxcom.net

SECOND
(Mary) Susan Weatherford
1290 College Dr
Madisonville, KY
270.825.4052/270.836.7641
shweatherford@bellsouth.net

THIRD
Linda Pitcock
4982 Gamaliel Rd
Tompkinsville, KY 42167
270.487.8164/270.427.1227
lpitcock52@gmail.com

FOURTH
Patty Evans
1137 Cave Rd
Campbellsville, KY 42718
270.469.5840
pgevans1@hotmail.com

FIFTH
Cassandra McBurney
715 Ghent Eagle S
Sanders, KY 41083
502.347.5587
cmburney715@gmail.com

JEFFERSON COUNTY
Susan Thurman
1134 Blackthorn Rd
Louisville, KY 40299
502.386.2555/502.386.2555
susan.thurman@outlook.com

CENTRAL KY EAST
Pamela Canter
1175 Perry Rogers Rd
Lancaster, KY 40444
859.339.8938
butchcanter@windstream.net

CENTRAL KY WEST
Lisa Petrey-Kirk (Co-Pres)
5001 Chaplin Rd
Willisburg, KY 40078
502.680.0740/859.375.5001
lisakaypk@gmail.com
Karen Guffey (Co-Pres)
917 Amanda Court
Lexington, KY 40515
859-537-7480
karlyssa@aol.com

MIDDLE CUMBERLAND
Tishana Cundiff
11181 South KY 501
Liberty, KY 42539
606.303.1132
tishana333@yahoo.com

NORTHERN KENTUCKY
Loretta Flerlage
1000 Independence Pike
Dry Ridge, KY 41035
859.824.4882/859.620.7462
sflerlage@zoomtown.com

UPPER CUMBERLAND
Sherry Skaggs (Co-Pres)
340 Greers Chapel Rd
Harrogate, TN 37752
423.869.8496
sskaggs56@outlook.com

UPPER KENTUCKY RIVER
Karen Griffith
20 Twin Cedar Rd
Jackson, KY 41339
606.295.9211/606.568.0113
KAYSEEGEE@Yahoo.com

BIG SANDY
J. Morgan Chapman
387 Walters Rd
Pikeville, KY 41501
606.432.3406
jimchapman1951@yahoo.com

EASTERN
Ann Porter
PO Box 88
Washington, KY 41096
606.584.2510
annsporter42@gmail.com

06/21/2022
KRTA OFFICE MEMBERSHIP PROCEDURES

JUNE

First week of June – All cash members are made inactive, and all ADD members on hold are pulled and made active auto in the KRTA database.

First Week of June- A letter with a Cash and ADD form is mailed to all nonmember retirees soliciting their membership.

First Week of June-A letter with a Cash and ADD form is mailed to each cash member soliciting their membership renewal.

JULY

Mid-July- A reminder email will be sent as a follow up to all Cash renewal members and nonmember retirees soliciting their membership.

AUGUST

First Week of August - A second letter will be sent to all nonmember retirees (retired 9 years or less) soliciting their membership and all Cash renewal members who have not yet sent in their renewals.

EACH MONTH

All new retirees, deceased retirees and address changes are received from KTRS.

New retirees are added to computer file and county list. This is always one month behind.

November, December, and January retirees are not imported until after the Martin Luther King Holiday. (Cut off for Convention Awards)

New retiree list is checked against ADD cards on file and those with cards on file are sent Permanent Membership Card and Telephone Reference Card, along with information on KRTA endorsed programs.

Letter with Membership Brochure sent to all other new retirees congratulating them and soliciting their membership.

Labels for new retirees are sent to local presidents in county of their residence suggesting the president contact them and solicit their membership in the Local Association.
Deceased members are deleted from computer file and ADD cards are removed from files.

Names of deceased are recorded by county or state for printing in the quarterly newspaper.

**DAILY**

Memberships are received and processed daily. A Membership Card and green sheet is mailed to the new member.

**AS REQUESTED**

Updated county lists and/or mailing labels for active and inactive members. Reports can be mailed or emailed - available in PDF format and Excel. Last county taught and retire date can be helpful to identify how to approach the member. Let the office know how your report can be customized to best fit your needs.

If requested of nonmembers that have been retired 10 years or more and have never joined can be removed from a county list. A retiree can also request their membership be moved to another county or removed from our database at anytime by calling the KR TA office.

Other documents; such as, KRTA brochure, What’s in a Name?, Membership Benefits (green sheet), Medical Insurance Information (yellow sheet), Legislative Program (blue sheet)

County lists are corrected by calling the KRTA office at 1-800-551-7979.
KENTUCKY RETIRED TEACHERS ASSOCIATION

JOIN US

as you

REFRESH . . .

RENEW . . .

REFOCUS . . .

in 2022-2023!

The following benefits and services are available to KRTA members:

Health Care
- Partnerships with Long-Term Care Insurance
- Discounted Dental Insurance
- Discounted Vision Plan
- Heuser Hearing Institute for diagnostic, therapeutic & medical services
- Discounted Legal Service—Nationwide Legaline (some services at reduced fees)

Free Finance & Investment Information Service
AAA Membership Discount
Discounted Auto and Homeowners Insurance with Liberty Mutual
Partnership with North American Life Plans
Discounted Identity Theft Protection through LifeLock
Partnership with Comfort Keepers, Home Instead Senior Care, and Home Helpers
N. O. Kimbler Fund for scholarships
Bourgard Benevolence Fund
Partnership with Commonwealth Credit Union
Annual Statewide Convention in April
Fall Regional Workshops – 14 Districts
KRTA News – 3 printed newspapers and 3 on-line web issues per year
ABOVE ALL: Advocacy for retirement benefits
LOCAL ASSOCIATIONS: REFOCUS

Gain access to new retirees, helping them to see what KRTA could mean to them.

WHAT LOCAL ASSOCIATIONS CAN DO . . .
❖ Goals for the new year will be set by the Membership Committee in July.
❖ Work toward your local goal, watching the %-age each month as changes occur when new retirees are added and deceased retirees are removed.
❖ When new retirees are reported to the local president each month, work to contact them with information about joining.
❖ KRTA has the best benefits to offer new retirees; make sure they know about them.
❖ WORK AS A TEAM! DON’T EXPECT ONE PERSON TO CARRY THE LOAD.
❖ BE ACTIVE IN YOUR COMMUNITY. SHOW THAT YOU’RE MORE THAN RETIRED!

2022-2023
July 1 – June 30

ADD cards must be in by October 28 to be deducted from the November 2022 annuity checks.
After October 28, a $20 check must accompany each ADD card.

Membership Awards will be determined after January 20, 2023

Questions?
502.231.5802
1.800.551.7979
info@krta.org
www.krta.org

118 Local Associations in 14 Districts

MEMBERSHIP COMMITTEE
Betty Hester & Debby Murrell, Co-Chairs

Anita Thomas, First
Norma Chapman, Second
Martha Jenkins, Third
Pamela Napier, Third
Sherry Radford, Third
Patsy Young, Fourth
Rebecca Woods, Fifth
Sheila Carson, Jefferson
Karen Gilbert, CKE
Lisa Petrey-Kirk, CKW
Janet Sogar, Northern
Shirley Ryan, Mid Cum
Debra Payne, Up Cum
Michael Caudill, Up Ky River
Lana Combs, Eastern
Wanda Mollett, Big Sandy
**COUNTY RTA**

**REMINDER**

**DATE**
July 1, 2022

**FOR YEAR ENDING**
June 30, 2023

**SEND LOCAL DUES TO**

**NAME**

(Affix label for retiree)

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Description</th>
<th>Amount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>One-year Local membership (Remit to Treasurer above)</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

**LEGISLATIVE UPDATE: KRTA Legislative Priorities**

1. Restore funding to the Medical Insurance Fund as required by HB540, the 2010 Shared Responsibility Law.

2. The General Assembly must continue to fully fund TRS.

3. The General Assembly must maintain the Defined Benefit System for current and future Retired Teachers.

4. Make no changes to the Board of Trustee structure of the Teachers Retirement System of Kentucky.

Share this with your Legislators.
REMINDER

DATE
July 1, 2022

FOR YEAR ENDING
June 30, 2023

SEND LOCAL DUES TO

NAME
(Affix label for retiree)

<table>
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<tr>
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<th>Total</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>One-year KRTA membership</td>
<td>$20.00</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

Remit to: Kentucky Retired Teachers Association
7800 Leaders Ln.
Louisville, KY 40291

or

Send the Automatic Dues Deduction (ADD) card to avoid this solicitation next year. Your $20 dues will be deducted from your November annuity each year by TRS.

LEGISLATIVE UPDATE: KRTA Legislative Priorities

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## SEND LOCAL DUES TO

### NAME

(Affix label for retiree)

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<td>One-year Local membership (Remit to address above)</td>
<td>$</td>
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4. Make no changes to the Board of Trustee structure of the Teachers Retirement System of Kentucky.

Share this with your Legislators.
The reminders can be mailed without envelopes if you fold them correctly. Check with your post office for the proper way to fold, tab, and address them. If improperly folded, the mailers will be returned. Obtain two sets of labels from the KRTA office (one for inside on the reminder and one for the outside).

Fold to inside

![Diagram of folding]

Fold up to outside back

Here is the illustration provided on the U.S. Postal Service website. Two tabs are required (since 2013). If you have an insert; i.e., ADD card, you will also need tabs on each end. I sometimes use labels cut into pieces, but you can buy small tabs.

![Incorrect folding]

Correct

For tri-folded self-mailers, the mailing address must be on the middle panel, with the final fold creating the non-address side.

In the case where spouses are being sent the same reminder, overlap the labels (showing only the name on the back label) so that only one reminder will be required for the household.
HOW WELL DO WE KNOW OUR ASSOCIATION?

1. When was KRTA established?
2. In what Kentucky city is the KRTA office?
3. How many Districts and Locals make up KRTA?
4. How many scholarships are given each year by the N.O. Kimbler Fund?
5. How many people work at the KRTA office?
6. Who is the KRTA Executive Director?
7. Who is the President of KRTA?
8. What is the name of the newspaper?
9. Who is the newspaper editor?
10. Approximately how many members does KRTA have?
11. Name the three standing committees of KRTA:
12. What is the name of the governing body of KRTA?
13. What are the names of the companies endorsed by KRTA that offer in home meal preparation, rest & relief for families?
14. What insurance does KRTA endorse for its members?
15. The Hearing Instrument Plan that is provided for members is with who?
16. What is the name of the free Legal Service that is offered to members?
17. The free Finance & Investment Line is provided for members by Mr. ?
18. When traveling around Kentucky, KRTA members can get special prices at
19. What are the annual dues for KRTA? What are the two methods of payments?
20. The Kentucky Retired Teachers Association Convention is held in the month of
21. What does TRS stand for?
HOW WELL DO WE KNOW OUR ASSOCIATION?

1. 1957
2. Louisville
3. 14 Districts and 118 Locals
4. 16
5. Three full time and 2 part time
6. Tim Abrams
7. Golden Hale
8. KRTA NEWS
9. Brenda Meredith
10. 32,000
11. Legislative, Health & Insurance, Membership
12. Executive Council
13. Comfort Keepers, Home Instead, Home Helpers
14. Liberty Mutual and/or Delta Dental
15. Heuser Hearing
16. Legaline
17. Hank Hensley
18. Kentucky State Parks
19. $20.00 Cash enrollment or Automatic Dues (ADD)
20. April
21. Teachers Retirement System
KENTUCKY RETIRED TEACHERS ASSOCIATION
MEMBERSHIP ENHANCEMENTS

7800 Leaders Lane Louisville, KY 40291
(502) 231-5802 or 1-800-551-7979
info@krta.org  www.krta.org

KRTA STAFF
Tim Abrams, Executive Director
Greg Roush, Deputy Executive Director
Brenda Meredith, KRTA News
Betty Hester, Technical/Database
Emily Carey, Office Manager
Jan Abrams, Events Manager

@KentuckyRetiredTeachersAssociation
@kyretiredteach

• KRTA State Units: 118 Local Associations & 14 District Associations
• Membership: Strong & unified voice in Frankfort with 31,000+ members strong
• KRTA NEWS: Three printed newspapers and three electronic issues per year
• Bourgard Foundation: Benevolence Fund for members
• N.O. Kimbler Memorial Scholarship Fund: Provides 16 scholarships to KY community colleges
• KRTA Annual Convention & 14 District Fall Workshops
• Legal Services: Rebecca Park 1-800-232-1090 Hours: 8:00-12:00 & 1:00-4:00
  o Free limited legal advice
  o Wills, Deeds, POA at reduced fees
• Finance and Investment Information: Henry Hensley at 1-800-927-0030
• Commonwealth Credit Union: 1-800-228-6420 or www.ccuky.org
  o Savings, Free Checking, Individual Retirement Accounts
  o Mortgages, Home Equity, Vehicle Loans / Home Equity Credit Cards
  o Special attention to 55+
• AAA: Jennifer Hester (502) 655-2827 or hester.jennifer@aaaec.com
  o KRTA members receive a $42 AAA membership first time AAA membership
• North American Life Plans, LLC: Jeff Johnson (502) 553-7630 or 1-888-362-1214 jjcraa@aol.com
  o Long-Term Care & Life Insurance
  o Identity Theft (Life Lock) Billing 1-866-815-2007
• Liberty Mutual Auto and Home Insurance: Stephanie Storer (502) 710-0563 or www.libertymutual.com/KRTA
  o KRTA members receive discounts on insurance premiums
• Stephen Foster Story: Enjoy BOGO please call 1-800-626-1563
• Kentucky State Parks: Commonwealth Connection visit www.parks.ky.gov/deals/state-employees
• Avesis Vision Plan: Enrollment 1-800-466-5182 Provider Questions Avesis1-800-828-9341
  o Open Enrollment: Anytime Plan Year: January 1- December 31 no prorations
  o Plans available: High and Low Option- Single Plan, Two Person, and Family
  o Jason Weilage 502.500.9623 jweilage@jswagency.com
• Delta Dental Plans/ VSP Vision Plan: 1-800-955-2030 or www.deltadentalky.com/krta
  o Enroll anytime with three plans available; PPO, PPO Plus, and Delta Care
  o Single Plan, Two Person, and Family
  o Jason Weilage (502) 500-9623  jweilage@jswagency.com
  o Billed by Morgan White 1-888-859-3759

• Heuser Hearing Institute: (502) 584-3573 or https://thehearinginstitute.org/
  o No charge consultation
  o Members discounts

• Comfort Keepers: 1-866-213-5344 or https://www.comfortkeepers.com/
  o Preferred member rates
  o Free in home consultation
  o Meal preparation, errand services, respite & relief for families, personal care services

• Home Instead Senior Care: 1-866-886-6831 or https://www.homeinstead.com/
  o Nine offices in Kentucky serving 53 counties
  o Preferred rate for services
  o Free in-home assessment
  o Meal preparation, errand services, respite & relief for families, personal care services

• Home Helpers: 1-800-990-9750 or https://www.homehelpershomecare.com/
  o Free in-home consultation
  o Senior Care - Long-term Care Recuperative Care
  o Personal Emergency Systems
  o Automated Medication Dispenser

TRS of KY
https://trs.ky.gov/ or 1-800-618-1687

TRS (MEHP) 65 and over or Medicare Eligible

• UnitedHealthcare Group Advantage (PPO) 1-844-518-5877 https://retiree.uhc.com/trs
• Express Scripts, Medicare Part D 1-877-866-5834
• KYRx Coalition 1-855-218-5979
• Corielle Life Science DNA Testing 1-888-454-9024
• Silver Sneakers 1-888-423-4632
• RENEW 1-888-219-4602
• Virtual Doctor 1-855-615-8335
• United HealthCare Hearing 1-866-445-2071

TRS (KEHP) 65 and under NOT Medicare Eligible

• Medical Anthem BCBS 1-844-402-KEHP
• Prescription CVS Caremark 1-866-601-6934
• 24/7 Nurse Line 1-877-636-3720
• KYRx Coalition 1-855-218-5979
• SmartShopper 1-855-869-2133
• Living Well Promise 1-866-746-1316
• Turning 65 Soon?

• Express Scripts, Medicare Part D
• 24/7 Nurse Line 1-877-636-3720
• KYRx Coalition 1-855-218-5979
• SmartShopper 1-855-869-2133
• Living Well Promise 1-866-746-1316
• Turning 65 Soon?

http://www.kehplivingwell.com


https://trs.ky.gov/retired-members/age-65-over/

https://trs.ky.gov/retired-members/under-age-65/

https://trs.ky.gov/retired-members/turning-65/

https://trs.ky.gov/retired-members/age-65-over/

https://trs.ky.gov/retired-members/under-age-65/

https://trs.ky.gov/retired-members/turning-65/
HISTORY & PURPOSE OF THE

KENTUCKY RETIRED
TEACHERS ASSOCIATION

1956 - 2022
HISTORY AND PURPOSE OF THE KENTUCKY RETIRED TEACHERS ASSOCIATION

The following account of activities of KR TA during the period 1956-1995 was prepared by M. L. Archer (with the assistance of Dr. Marvin Dodson, Ted Crosthwait, the KRTA staff and others) in 1996. KRTA activities for the period 1995-2002 were summarized by Frank Hatfield (with the help of his wife Margaret) in 2004. Their accounts remain intact as they represent the state of KRTA as it was at the time of their writing.


The Kentucky Teachers' Retirement System Law was passed in 1938 and funded in 1940. The Law specified that the active teachers would contribute to the fund and the State would match their contributions. The Law also stipulated that an additional appropriation would be made by the State to fund contributions not made by those who taught before 1940. This was a sizable fund and the Law stipulated that it be paid over a 30 year period. Several years went by and several administrations failed to make the necessary appropriations. This plus several other concerns prompted a few interested individuals to decide that retired teachers in Kentucky needed a voice to represent them. They spread the word around that we were being neglected. Some concerns were:

1. The "over match" was being neglected.
2. Nothing was being appropriated for cost of living increases. (See Appendix I.)
3. Health problems were becoming more apparent without adequate insurance to cover medical costs.
4. It became apparent that other problems could occur and that we needed representation.

A group of prominent educators met at the KEA building in Louisville, Kentucky, and discussed the possibility of creating an organization to be called the "Kentucky Retired Teachers Association." It would have as its sole purpose the welfare of retired teachers. Dr. Marvin Dodson was the Executive Secretary of KEA and gave it his and KEA's blessing as they did not have the staff or resources to fund such an organization.

From this meeting KRTA was organized in 1957 and KEA agreed to furnish office space and secretarial help. A KEA staff member served as a consultant to the President and Executive Council. Dues were established at $5 per member and KEA was paid $2 per member to provide the services previously listed and to include an insert in the KEA paper. This service continued after KEA moved to Frankfort in the early 80's and ended on July 1, 1991.

Dr. Dodson retired from KEA and was hired by KRTA part time in 1978. In order to pay Dr. Dodson, the dues were increased to $10 per year. We still paid KEA $2 per member for computer services, printing and the insert in their newspaper. KEA had no direct participation in the operation of KRTA. Dr. Dodson, a secretary and many volunteers did the work. I distinctly remember Margaret and Les Wetherell being present almost every time I visited the State office. Dr. Dodson said the biggest job facing the early leaders of KRTA was getting locals established in the various counties.

In the beginning there were 12 districts established and it seems the First District was the leader in getting membership. I can understand why after meeting Dolly Gillihan from Ledbetter, Kentucky, in Livingston County. She visited every county in the district and knew several retired teachers in each county. The First District has been number one in membership since the beginning and is still number one today. Getting the other districts and counties organized was more difficult since there was a great deal of apathy in some counties toward organizing locals.

The Legislative Committee was formed to represent KRTA in the Legislature. This was headed by Mr. W. S. Milburn from the Louisville schools. He was hampered by the lack of local organized support but it was a start.
However, because of the efforts of a few dedicated leaders, a strong beginning was underway. By 1964 the Medical Insurance Program was developed and made effective in 1965. In 1966 the practice of giving retirees periodic cost-of-living increases was begun. The influence of strong local leadership has been so successful that this practice has been continued in all but a very few years. In fact, during the period from 1966 to 1994 there were only seven years when an ad hoc COLA was not provided. Local units in each county have made it possible for individual retirees to be heard in regard to matters of importance to them.

The first President was John Brown who served two terms from 1957 to 1959. He was followed by Mary McGuire 1959-1961 and R. E. Jaggers 1961-1963. Bess Roberts who served in 1962-1963 remained active after her term and remains so today. Ms. Willie Ray, Superintendent, Shelbyville City Schools, was active many years. She served as President in 1965-1967. Mr. Gordie Young who was President in 1963-1965 served as Assistant Superintendent of Public Instruction under two or more State Superintendents.

I only mention these early Presidents to impress upon you the kind of people who were responsible for our having such a fine organization. When I retired in 1975 and joined KRTA, I immediately heard of Mr. James Ennis and his wife Ruth from Metcalfe County, who represented the Third District so well along with Bob Piper and his wife Elinor. Bob served effectively as President in 1981-1983. The districts began gaining life as leaders emerged in each district.

The organization really blossomed when KEA moved to Frankfort and KRTA moved into the Sullivan College Building, 3901 Atkinson Drive, just off Newburg Road and the Watterson Expressway. After a few years in this building, the Council started talking about a building of its own. Excess funds were set aside in a building fund account. Dr. Dodson recalls that KRTA began holding three workshops each year in the fall at the state parks. The agenda would go something like this: An afternoon session on the first day; dinner and a night session followed by some socializing; an overnight stay; breakfast and a morning session. After lunch the participants would head home. KRTA would pay for one car from each local. NRME would pay for lunch for five people from each local unit. The Council decided later that more participants could be reached if one day workshops were held in each district. There was some displeasure about missing the social aspects of the meeting, but the change was made and remains this way until the present time.

In 1965 the Retirement System started a Health and Insurance Program by assessing the active teachers about 3/4 of 1 percent of their salaries matched by the State. This necessitated KRTA having an Insurance Committee. Mr. Jack Gardner served as the first chairman. He had a representative from each district on his committee. Robert Kelley was active on his committee and became chairman when Jack became disabled in 1987. Robert is still chairman and the committee remains very active under his leadership.

The many fine leaders we have had over the years have all left their imprint on the organization. Joe Howard gave Louisville a boost in 1976-1977; Clyde Lassiter gave Central Kentucky a boost; and John Ridgway was never president but helped me considerably when I was President in 1983-1984. I remember Harry Sparks’ inspirational leadership in 1979-1980, as well as Dillard Moor from the Fourth District in 1978-1979. Grace Crosthwaite was certainly a great leader in Eastern Kentucky. I remember her well. Virginia Murrell was President in 1982-1983 and gave a boost statewide, especially in Northern Kentucky where she taught most of her career and in Middle Cumberland District where she lived.

In 1983-1984 while President, I was charged by Dolly Gillihan to finish organizing the few locals that were still unorganized. We were successful in organizing Wolfe, Menifee and Trimble Counties. More recently Leslie County has organized and we now have representation in every county.

Several changes in organizational structure have taken place at the Council’s direction since KRTA was first organized. Eastern District was divided into two districts—Eastern and Big Sandy. Central District was also split
forming Central Kentucky East and Central Kentucky West. At the same time Franklin County was moved out of the Central District into Fifth District in an effort to give Fifth District sufficient size to be more active. The move proved to be effective and Fifth District now ranks fourth in the State in membership percentage. In all cases where districts were split or changed, a resulting growth in membership has occurred.

Increased membership became our main objective during my term as President. I was privileged to attend a meeting on pre-retirement planning for active teachers in South Carolina. I reported back to the Council and they approved a program for KRTA to start this service in Kentucky. With the help of Frank Hatfield, who had then replaced Dr. Marvin Dodson as Executive Director of KRTA, and Charles DeWeese, seminars were offered in each district in the State. Seminars were conducted on Saturday mornings during the months of September and October. The attendance was great and the involvement of the retired teachers with active teachers prompted the active teachers to become interested in KRTA when they retired.

Holding these seminars plus an agreement in 1980 for the Retirement System to withhold dues from the retirees’ annuity checks in November each year has been instrumental in the growth of the Association. Many teachers sign the automatic dues deduction forms at the Pre-Retirement Seminars before they retire. These forms are kept on file and sent to Frankfort when KRTA is notified of their retirement. The Pre-Retirement Program has gone well and continued under KRTA’s direction until 1993 when the Retirement System assumed responsibility for conducting the Pre-Retirement Seminars. The change was made with the encouragement of KRTA since it was felt that KTRS was in the position to provide more information and might get more attendance because of their official position with the retirees. In order to remain in touch with active teachers, KRTA agreed to attend the seminars to help with registration and provide refreshments.

J. D. Turley served as President of KRTA in 1984-1985. He developed the KRTA logo and got the Association started on visual presentations to encourage membership. He also divided Jefferson County into small segments and was successful in greatly increasing the KRTA membership from Jefferson County.

I was appointed State Membership Chairman in 1984 and remain in that position today. My main purpose in preparing this history is to demonstrate how important membership is to having a strong organization and how important a strong organization is to the welfare of retired teachers in Kentucky.

Jack Gardner served effectively as President in 1985-1986 and then served as Chairman of the Health and Insurance Committee until 1987.

NRTA served Kentucky well under Dolly Gillihan’s leadership. When Kentucky and all other NRTA members merged with AARP in 1982, Ted Crosthwait was appointed Coordinator for Kentucky. He served in that position until 1986 when Charles DeWeese was appointed Coordinator. Both of these gentlemen did an outstanding job for retired teachers in Kentucky. After Charles DeWeese’s death in 1991, Ms. Pearl Miller was appointed Coordinator, a position she continues to effectively fill. KRTA is fortunate to have the support of AARP, especially the help in financing our Fall Workshops by providing funds for meals for five persons from each local association, the district officers, and other guests. KRTA also works with AARP on legislative issues of common interest.

Ted Crosthwait was reappointed Legislative Chairman (a position he had previously held) after leaving the coordinator’s job. The Council has regretfully accepted Mr. Crosthwait’s resignation from the Chairmanship of the Legislative Committee effective June 30, 1994. He has assured the Council that he will continue to work with that committee and cooperate fully with his replacement. Ted’s expertise will be missed; he is well known across the state by most state legislators. Having served as Executive Secretary of KTRS, he is most knowledgeable about Retirement System Law and the needs of the Retirement System as well as the membership.

We continue to have able presidents and leadership from the State office. Dr. Dodson retired from his position as part time Executive Director on June 30, 1987. Mr. Frank Hatfield, former Superintendent of Bullitt County
Schools, was employed full time to replace Dr. Dodson. The Constitution was revised and the dues were raised to $15 per year prior to Dr. Dodson’s leaving the Association. This created sufficient funds to pay a full-time director.

Following the employment of a full-time staff, membership increased rapidly. This increase created a surplus in funds that was set aside to acquire an office building. This long time dream of the early leadership in KRTA was accomplished with the purchase of property in April 1991. The office building was dedicated on June 6, 1993. It is located at 7505 Bardstown Road in Louisville, Kentucky.

The list of outstanding Presidents has continued since the change to a full time Executive Director. They include: Ted Crosthwait, 1987-1988, Fifth District; Mildred Tupman, 1988-1989, Northern Kentucky District; John Vickers, 1989-1990, Central East District; Russell Boyd, 1990-1991, Big Sandy District; Robert Kelley, 1991-1992, Fifth District; Juanita Singleton, 1992-1993, Upper Kentucky River District; and Bobby Humes, 1993-1994, Fourth District. These Presidents have all made their contribution toward moving the State organization to better serve the membership. (See Appendix II for a complete list of presidents and their years of service.)

Evidence of this progress includes:

1. We’ve seen a continuous growth in membership to an all time high of 14,758 in February 1994. (See Appendix III.)
2. We have our own newspaper which has increased in size from four to eight or twelve pages depending on need.
3. We no longer depend on KEA for any services and pay them no dues.
4. We now have our own in-house computer services.
5. Our office building is completely furnished, fully paid for, and the Association still has funds in the bank above the needs for current operating cost.
6. The Legaline has been made available to the membership for basic legal information through a toll free telephone line.
7. Free financial advice is also available on a toll free telephone line.
8. KRTA is represented at each Legislative Session by a qualified lobbying body.
9. We have maintained excellent relations with the Retirement System and work closely with the staff to coordinate the KTRS Legislative Program with the KRTA Program.
10. The State organization has made available to the membership an excellent Long Term Care Insurance Program. This Program is provided to the members at a discounted premium rate. A Dental/Vision Plan was also offered to the membership beginning in January 1994.

There will be other services provided as we grow and improve our organization. We have a strong State Association; our districts are also beginning to take on more responsibility. Membership is increasing and we believe the emphasis for further improvement of our Association lies with our local units. Our goal in 1994-1995 is to strengthen the organization at the local level. We are suggesting that the District Council Members and the District Officers work together calling a meeting in the district soon after each Council meeting.

These meetings should concentrate on Membership in June or July, Health and Insurance in August or September, and Legislation in December. The spring meeting could be used to emphasize plans for the upcoming year.

We need to continue what a few farsighted individuals saw as a need in the State to serve retired teachers. We would be remiss if we didn’t mention the fact that volunteers are the backbone of our organization and we need to be on the lookout for capable people to take leadership roles. This is the key to keeping our organization strong. Our central staff is not sufficient to do all the work required to have an effective organization. The more interest and
commitment we have on the part of each member the more we can be assured that KRTA will keep moving in the right
direction.

I hope you see how this brief history should inspire greater participation in our organization, because the efforts of
volunteers in the future just like those in the past will continue to benefit the volunteers’ well-being as well as many
others. With the increased number of retirees we are having each year, the task becomes more difficult and
requires more effort on the part of each of us. This postscript expresses my sentiments as your Membership
Chairman, and I hope you will see the importance of membership to the organization.

1995-2002

In 1996, M. L. Archer with the help of Marvin Dodson, Ted Crosthwait and the KRTA staff, wrote a brief history of
KRTA from 1956 to 1995. I have been asked to continue the history from 1995 to 2002.

As Mr. Archer did, I will try to trace the progress of KRTA by highlighting the people and events that have
contributed toward KRTA’s continued growth and influence.

As has been the case since its inception the Association has continued to benefit from strong leadership provided by
the officers, executive council, committee chairpersons and officers at the district and local levels. Each of the
presidents, prior to being president, has served as vice president, president elect and in various other capacities at the
local, district and state levels.

Virginia Shaw, from Crab Orchard in the Central Kentucky East District, served as president in 1995-1996. Ms.
Shaw set the following goals for her tenure in office:

1. Making KRTA as visible as AARP
2. Making the N. O. Kimbler Fund more visible within our membership
3. Generating a greater awareness of the services available through KRTA
4. Enhancing the locals
5. Sharing ideas, suggestions and talents at all levels-local, district and state

In August 1995, the Association officially adopted the Shared Visions document which had been prepared by a task
force committee from AARP and KRTA. This plan for cooperation between AARP and the state association was
used by AARP as a model across the nation.

In April, the Executive Council approved the expansion of the N. O. Kimbler Scholarship program to provide one
$800 scholarship to each of the 15 community colleges.

Bobby Humes served as Legislative Chairman for his first session in 1996. Bobby, with the help of the other
lobbyist, continued KRTA’s effective presence in the legislature established by Ted Crosthwait during his many
years of service as Legislative Chairperson.

During 1995-1996 the Association joined the Fern Creek Chamber of Commerce and endorsed the mission
statement of Quality Care Coalition of Kentucky. In line with Ms. Shaw’s goal, this increased the visibility of
KRTA at both the local and state level.

Robert Estes, Louisville, was elected president for 1996-1997. During his term the Association celebrated its 40th
anniversary.

Virginia Shaw was appointed chairperson of the Membership and Pre-Retirement Committee following the
resignation of M. L. Archer. Mr. Archer had served as committee chairman for 12 years. Upon his retirement from
In this position, he was elected an honorary life member of the Committee. In recognition of his contribution to the association, the M. L. Archer Award was established. This award is given to local associations with membership of at least 90 percent of those eligible.

In a continuing effort to make the KRTA more visible, the Association elected to participate in the President’s initiative, “Turning the Tide For America’s Youth.” Geraldine Mellott of Northern Kentucky District attended a volunteer summit workshop in Washington, D.C., to help write plans for the project.

This being the 50th anniversary of the National Retired Teachers Association, KRTA participated in that celebration by collecting volunteer hours from all retired teachers for the period September 1996 through May 1997. The Association also agreed to select the outstanding retired teacher in Kentucky who would compete at the national level for the national outstanding retired teacher. There were 45 applicants. Mr. Richard Jett, of Campton, Kentucky, Wolfe County, was the state winner. In August he participated in the selection of the national outstanding retired teacher and placed third in the nation. He was honored at the NRTA Convention in San Diego, California.

In a continuing effort to expand services to members, the Council approved expansion of the services provided through the Finance and Investment Line offered through Henry Hensley and Associates. It was also during this year that the Council approved a comparative study of various Kentucky Retirement Systems.

Frances Miller, of Russell, Kentucky, Greenup County, was elected president for 1997-1998. Early in the year a report was given by National Health Administrators on the status of the KRTA endorsed Long Term Care Insurance Policy. The report showed a total of 3,718 policies already in force with many applications proceeding through the approval process.

In September a report on the comparative study of the Kentucky Retirement Systems was given to the Council. The study, conducted by Dr. Tom Jeffries of the University of Louisville, outlined a number of inequities in the teacher retirement system as compared to some of the other systems. Inequities were in the areas of state funding, death benefits and cost of living adjustments. These inequities became the basis for the KRTA Legislative Programs for the next several legislative sessions. Results were almost immediate. Shortly after the report was made, the death benefit for retired teachers was raised from $3,000 to $5,000, followed by the passage of ad hoc COLA’s which brought retired teachers in line with the other systems.

The association was notified that Governor Paul Patton had declared October 13-17 Kentucky Retired Teacher Week. He also invited representatives of the Association to Frankfort for the Declaration ceremonies. At that meeting, the association presented a facsimile check to the governor in the amount of $2,473,367.00 representing the value of over 190,000 hours of volunteer work done by association members during the past year.

KRTA continued its involvement with other issues and organizations by participating in the NRTA “With Our Youth” promising new opportunities program, joining Kentuckians United for Children Alliance, and becoming a party to the suit against Blue Cross and Blue Shield Insurance Company. The suit sought to have Blue Cross/Blue Shield return to the state excess funds it had on hand when it switched from a not-for-profit to a for-profit company. The suit was successful and resulted in $45,000,000 being returned to the state by Blue Cross/Blue Shield.

In April 1998, the 15 N. O. Kimbler Scholarships awarded in the community colleges were raised to $1,000 each. A number of personnel actions took place during 1997-1998:

1. Marvin Dodson was named Executive Director Emeritus in recognition of his service as the first Executive Director of KRTA and his continuing service to the organization after his retirement.

2. Robert Kelley retired as chairman of the Health & Insurance Committee, after which he was named an Honorary Life Member of the Committee.

3. The Council approved the employment of a Deputy Executive Director.
Ray Roundtree of London, Kentucky, served as president of KRTA in 1998-1999. During this year KRTA became involved in two major issues. Contact was made with the Kentucky Congressional Delegation expressing to them the Association’s opposition to mandatory social security and outlining the damage it would do to the Kentucky Teacher’s Retirement System. At the state level the Association took a major role in promoting Telemarketing Legislation which would restrict the unsolicited marketing calls made to individual homes. This effort later resulted in passage of one of the strongest telemarketing laws in the nation.

In response to a request from KET, KRTA became a member of the KET Fund for Excellence. KRTA became the second largest association contributor to this fund with annual contributions in excess of $ 10,000.

Recognizing the added activity at the district level, the Council adopted a District Recognition Program. Following the example of the Local Recognition Program, each of the 14 districts is evaluated and recognized based on activities considered important to KRTA’s success.

Vanda Gibson, Murray, Kentucky, First District, served as President for 1999-2000. This year saw a continuing increase in KRTA’s involvement in activities outside of education which are important to the senior population. This involvement included:

1. Partnering with the American Cancer Society to promote the “Tell a Friend” program calling attention to the need for elderly women to have mammograms
2. Joining the Mental Health Coalition to promote increased funding for the mental health needs of Kentucky’s citizens
3. Participating in the Governor’s Conference on Aging

Some important changes were made in the structure of KRTA during this year. Betty Hester was hired as the first Deputy Director of the Association. Betty was assigned major responsibility for the KRTA News and other materials produced by the Association. She also played a major role in updating the computer services in the state office. The results of her work were immediately evident through the improved quality of the quarterly newspaper.

In an effort to divide the load put on the standing committee chairmen because of the Association’s increased activity, the Council approved the addition of committee co-chairs. Ray Roundtree joined Bobby Humes as Co-Chair of the Legislative Committee; Irene Erskine joined Vincent Watts as Co-Chair of the Health and Insurance Committee; and Harold VanHook became Co-Chair of the Membership and Pre-Retirement Committee joining Virginia Shaw.

Pearl Miller retired as the AARP/KRTA Liaison, a position she had effectively held since 1991. Frances Miller was appointed to fill the vacancy left by Pearl’s retirement.

Maude Teegarden, of Bracken County in the Northern Kentucky District, served as president in 2000-2001. During that year membership in the Association reached 20,000. The membership committee had set a goal of 20,000 in 2000. Maude was actively involved in promoting the “With our Youth” program.

KRTA welcomed the addition of a state AARP office in Louisville and immediately began working with the personnel in that office on issues of common interest. In an effort to call attention to the special contributions made by grandparents in children’s lives, the two organizations initiated a Grandparent Essay Contest. The contest is open to fifth graders who are asked to write an essay on why their grandparent should be selected Kentucky’s Grandparent
Recognizing the continuing threat of mandatory Social Security, the association joined the Coalition to Preserve Retirement Security. CPRS is made up of retirement systems and retiree associations across the nation that do not participate in Social Security.

Member Services were expanded with the addition of an endorsed Automobile and Home Owners Insurance program. This program is provided through Liberty Mutual Insurance Company and has proven to be of real benefit to many KRTA members.

In April, Frank Hatfield announced his decision to retire as Executive Director on June 30, 2002. President Teegarden appointed a search committee that immediately began the process of finding a new executive director.

Ernie Trosper, of Paris, Kentucky, in the Central Kentucky West District, served as president in 2001-2002. Early in the year the Executive Director Search Committee made its report and recommended the employment of Dr. Robert Wagoner as the new executive director. Dr. Wagoner’s career in education made him a good fit for the executive director’s position. His experience included both teaching and administrative positions in the public schools as well as service at the state level. The Council approved his employment on January 1, 2002, as Executive Director Elect to become Executive Director on July 1, 2002.

KRTA continued its partnership with KET. KET reported that the previous year’s contributions by KRTA members amounted to $13,771. Since 1999 Association members have contributed over $41,000. KRTA remained the second largest contributor.

Member services were expanded with the addition of a third dental vision program.

At the April Convention, Mr. and Mrs. Hatfield were presented a generous gift from KRTA members across the state. A special tribute newsletter was published in Mr. Hatfield’s honor and he was named Executive Director Emeritus of the Association.

In no way would this history be complete without mentioning some of the activities that took place throughout all the years from 1995 to 2002. On the following pages are those I think are most significant.

The Association, since its beginning, has worked closely with the Kentucky Teacher’s Retirement System. The presentation of a united program from both the retirement system and the Association has been a key factor in the successes experienced with the Kentucky General Assembly. A review of Appendix I showing the cost of living adjustments and the increases in the value of service credit validates this success.

Mr. Pat Miller, whom the Association honored upon his retirement, was always open to working with KRTA. Gary Harbin, Mr. Miller’s successor, continued that tradition and, in fact, has even developed a closer working relationship.

Growth in membership has been continuous and substantial. The number of members has increased by 6,662 from 14,758 in 1995 to 21,380 in 2002. This has allowed the Association to remain fiscally sound while increasing services without any increase in dues since 1986.

Pre-Retirement Seminars, which were initiated by KRTA, have continued to grow in both numbers and importance. Since the retirement system assumed responsibility for these seminars, the Association has continued its involvement by helping with registration and furnishing refreshments for the prospective retirees in attendance.

The 14 fall workshops and the annual convention, in addition to keeping the membership informed, provide a strong link between the state and local and district associations. As a result, the districts and locals have made steady progress under strong leadership at both these levels.

The standing committees continue to do much of the work of the Association. A look at the COLAs in Appendix I plus other legislative successes and improved benefits through the retirement system provides a clear picture of
the Legislative Committee’s effectiveness. The membership growth shown in Appendix III is evidence of the leadership provided to the local associations by the Membership and Pre-Retirement Committee. Changes in health insurance during the period covered by this history have been extensive. The Health & Insurance Committee has done a superb job in tracking these changes and keeping the membership informed.

No one has contributed more to KRTA’s success and to the stature of the state office than Carla Hahn. Carla is a tireless worker; and most important to our membership, she is patient and pleasant. A great number of people over the years have expressed their appreciation for the response received from Carla when calling the office for help. The Executive Council honored Carla for her service with a tribute entered in the Executive Council minutes. On June 30, 2002, Carla completed 15 years of service to the Association.

Finally, I would be remiss if I did not mention the contributions that my wife Margaret has made to KRTA. In addition to part time work she did as an employee, never knowing when she would be called on to fill in, she volunteered many hours of service at over 200 workshops. I think it is safe to say that no one has handled more blue cards than Margaret.

I hope this history of KRTA for the seven years that I have covered will give future readers a sense of just what it is that makes KRTA so important to retired educators. As stated by M. L. Archer in the history he wrote for the period 1956 to 1995, the central staff is not sufficient to do all the work required to have an effective organization. The more interest and commitment we have on the part of each member the more we can be assured that KRTA will keep moving in the right direction.
## COST OF LIVING ADJUSTMENTS

<table>
<thead>
<tr>
<th>YEAR</th>
<th>COLA</th>
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<tbody>
<tr>
<td>1956-1965</td>
<td>Retirees received no increases.</td>
</tr>
<tr>
<td>1966</td>
<td>Retirees received 10 percent if retired prior to July 1, 1964.</td>
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<tr>
<td>1967</td>
<td>Retirees received 1 percent uncompounded.</td>
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<tr>
<td>1968</td>
<td>Retirees received 1 percent uncompounded.</td>
</tr>
<tr>
<td>1969</td>
<td>Retirees received 1 percent uncompounded.</td>
</tr>
<tr>
<td>1970</td>
<td>Retirees received 1 percent uncompounded plus $2 per month per year of service to 20 years.</td>
</tr>
<tr>
<td>1971</td>
<td>Retirees received 1 percent uncompounded.</td>
</tr>
<tr>
<td>1972</td>
<td>Retirees received 1 percent uncompounded plus 5 percent or $240.</td>
</tr>
<tr>
<td>1973</td>
<td>Retirees received 1 percent uncompounded plus 5 percent or $240.</td>
</tr>
<tr>
<td>1974</td>
<td>Retirees received 1 percent uncompounded plus 5 percent.</td>
</tr>
<tr>
<td>1975</td>
<td>Retirees received 1 percent uncompounded plus 5 percent.</td>
</tr>
<tr>
<td>1976</td>
<td>Retirees received an increase of 3 percent per year for each year they had been retiree between July 1, 1971 and July 1, 1976, using a minimum of $200 per month and a maximum of $500 per month in making the calculations. The base amount increased 1 percent.</td>
</tr>
<tr>
<td>1977</td>
<td>The base amount increased 1 percent.</td>
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<tr>
<td>1978</td>
<td>Retirees received a 2 percent increase if they had been retired at least one year.</td>
</tr>
<tr>
<td>1979</td>
<td>Retirees received an additional 2 percent increase if they had been retired at least two years. Increases based on assumed monthly minimum of $200 and assumed monthly maximum of $600. The base annuity amount increased 1 percent. The minimum monthly benefit payment increased from $55 to $75. The minimum annual benefit increased from $60 to $88 per year of service.</td>
</tr>
<tr>
<td>1980</td>
<td>Retirees received a 3 percent increase if they had been retired at least one year. Retirees received an additional 2 percent increase if they had been retired at least five years. Increases based on assumed monthly minimum of $200 and assumed monthly maximum of $750. Monthly annuity increased 1 percent based on June, 1980 annuity. Value of prior service increased from $88 to $100 for each year of service prior to 1941.</td>
</tr>
</tbody>
</table>
## Appendix I (Cont.)

### COST OF LIVING ADJUSTMENTS

<table>
<thead>
<tr>
<th>YEAR</th>
<th>COLA</th>
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</table>
| 1981 | Retirees received a 3 percent increase if they had been retired at least one year.  
Retirees received an additional 2 percent increase if they had been retired at least five years.  
Increases based on assumed monthly minimum of $200 and assumed monthly maximum of $750.  
Monthly annuity increased 1 percent based on June, 1981 annuity. |
| 1982 | Retirees received a 1 percent increase for every year they had been retired up to a maximum of 5 percent.  
Increases based on assumed monthly maximum of $1,000.  
Monthly annuity increased 1 percent based on June, 1982 annuity. |
| 1983 | Retirees received a 1 percent increase for every year they had been retired up to a maximum of 5 percent.  
Increases based on assumed monthly maximum of $1,000.  
Monthly annuity increased 1 percent based on June, 1983 annuity. |
| 1984 | Monthly annuity increased 1 percent based on June, 1984 annuity. |
| 1985 | Monthly annuity increased 1 percent based on June, 1985 annuity. |
| 1986 | Retirees received a 1 percent increase for every year they had been retired up to a maximum of 5 percent.  
Increases based on assumed monthly maximum of $1,000.  
Monthly annuity increased 1 percent based on June, 1986 annuity.  
(Continued in next column) |

<table>
<thead>
<tr>
<th>YEAR</th>
<th>COLA</th>
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</table>
| 1987 | Minimum value of a year of service credit was increased from $88 to $140.  
Retirees received a 3 percent increase if they had been retired at least one year.  
Increases based on assumed monthly maximum of $1,000.  
Monthly annuity increased 1 percent based on June, 1987 annuity.  
Minimum value of a year of service credit was increased from $140 to $180. |
| 1988 | Retirees received a 2 percent increase if they had been retired at least one year.  
Increases based on assumed monthly maximum of $1,000.  
Monthly annuity increased 1 percent based on June, 1988 annuity.  
Minimum value of a year of service credit was increased from $180 to $190. |
| 1989 | Retirees received a 2 percent increase if they had been retired at least one year.  
Increases based on assumed monthly maximum of $1,000.  
Monthly annuity increased 1 percent based on June, 1989 annuity.  
Maximum value of a year of service credit was increased from $190 to $200. |
### COST OF LIVING ADJUSTMENTS

<table>
<thead>
<tr>
<th>YEAR</th>
<th>COLA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>The General Assembly approved an increase in the permanent COLA from 1 percent to 1.5 percent effective July 1, 1990. In addition, the General Assembly approved a COLA of 3.5 percent for July 1, 1990 and July 1, 1991 for all members retired at least one year. These increases are applied to the first $1,250 of the monthly annuity. The minimum value of a year of service was increased from $200 to $210 effective July 1, 1990 and to $220 effective July, 1991. Retirees received a 1.5 percent if they had been retired at least ten months. Retirees received an additional 3.5 percent increase on the first $1,250 of their annuity if they had been retired for at least 12 months. The minimum value of a year of service credit was increased from $200 to $210.</td>
</tr>
<tr>
<td>1991</td>
<td>Retirees received a 1.5 percent if they had been retired at least ten months. Retirees received an additional 3.5 percent increase on the first $1,250 of their annuity if they had been retired for at least 12 months. The minimum value of a year of service credit was increased from $210 to $220.</td>
</tr>
<tr>
<td>1992</td>
<td>Retirees received a 1.5 percent if they had been retired at least ten months. Retirees received an additional 1.0 percent increase on the first $1,250 of their annuity if they had been retired for at least 12 months. (Continued in next column)</td>
</tr>
<tr>
<td>1993</td>
<td>The minimum value of a year of service credit was increased from $220 to $240. Retirees received a 1.5 percent if they had been retired at least ten months. Retirees received an additional 1.0 percent increase on the first $1,250 of their annuity if they had been retired for at least 12 months. The minimum value of a year of service credit remained at $240.</td>
</tr>
<tr>
<td>1994</td>
<td>Retirees received a 1.5 percent if they had been retired at least ten months. Retirees received an additional 1.5 percent increase on the first $1,250 of their annuity if they had been retired for at least 12 months. The minimum value of a year of service credit was increased from $240 to $260.</td>
</tr>
<tr>
<td>1995</td>
<td>Retirees received a 1.5 percent increase if they had been retired at least ten months. Retirees received an additional 1.5 percent increase on the first $1,250 of their annuity if they had been retired for at least 12 months.</td>
</tr>
<tr>
<td>1996</td>
<td>Retirees retired at least 10 months received a 1.5 percent COLA plus 1 percent on the first $1,250 of their monthly annuity. The minimum value per year of service credit was increased by 5 percent for those retirees receiving less than $834.</td>
</tr>
<tr>
<td>1997</td>
<td>Same as 1996</td>
</tr>
</tbody>
</table>

Appendix I (Cont.)
<table>
<thead>
<tr>
<th>YEAR</th>
<th>COLA</th>
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<td>1998</td>
<td>Retirees retired at least 10 months received a 3 percent COLA.</td>
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<td>The minimum value per year of service credit was increased from $260 to $300</td>
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<td>1999</td>
<td>Retirees retired at least 10 months received a 3 percent COLA.</td>
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<td>The minimum value per year of service credit was increased from $300 to $310</td>
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<td>Retirees retired at least 10 months received a 2.3 percent COLA.</td>
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<tr>
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<td>The minimum value per year of service credit was increased from $310 to $325</td>
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<td>Retirees retired at least 10 months received a 2.5 percent COLA.</td>
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<td>The minimum value per year of service credit was increased from $325 to $335</td>
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<td>Retirees retired at least 10 months received a 2.9 percent COLA.</td>
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<td>The minimum value per year of service credit was increased from $335 to $400</td>
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<td>The minimum value per year of service credit was increased from $400 to $440</td>
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<th>YEAR</th>
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</tr>
<tr>
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<td>Retirees retired at least 10 months received a 1.5 percent COLA.</td>
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<tr>
<td>2022</td>
<td>Retirees have continued to receive a 1.5 percent COLA annually per statute.</td>
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<td>Bobby Humes 1993-94</td>
<td>Rick Tatum 2024-25</td>
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## KRTA MEMBERSHIP

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Appendix III  KRTA HISTORY