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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: Sept 2022, Jan 2023 May 2023
KRTA DISTRICT PRESIDENT'S RESPONSIBILITIES

I. Conduct five (5) District meetings annually involving the District's Executive Council and State Committee members. Others involved in these meetings should be District and Local RTA Officers and committee chairpersons (preferably).

Meeting Schedule:

District Planning Meeting -After summer District Presidents meeting, but prior to the District's KRTA Fall Workshop. Participants should be: District Officers, Executive Council Member, State Committee Members, and Local Presidents. (Focus-Review Local President's Handbook and plan District's activities for the year)

1st District Meeting- The same day as the district's KRTA Fall Workshop. (Focus-Organizational)

2nd District Meeting- After Fall Workshop, but prior to November 1. (Focus-Leadership Training)

3rd District Meeting- After December Executive Council Meeting. (Focus-General Session)

4th District Meeting- After January 1, but prior to Annual KRTA Convention. (Focus-General Session)

5th District Meeting- After annual KRTA Convention, but prior to June 30. (Focus-General Session)

In addition to reporting on Executive Council activities, these meetings should include District activity in the following areas:

- MEMBERSHIP: Plan promotional activities for local, district and state membership drives.
- LEGISLATIVE: Canvas membership and collect information for the State Legislative Program and/or review new legislation.
- HEALTH & INSURANCE: Secure, review and distribute information pertaining to health and insurance.

NOTE: The following items should also be completed at the appropriate meeting:

- Make District Committee Assignments
- Prepare District Budget
- Elect District Officers (Report to KRTA Office by May 15)
- Elect KRTA Council Member (Report to KRTA Office by May 15)
- Make KRTA Standing Committee Recommendations (Report to KRTA office by May 15)
II. Serve or appoint a contact person for the Fall Workshop to assist KRTA in arranging for the meeting place and meal. Welcome and introduce the program at the Fall Workshop. Promote attendance at the Fall Workshop:

III. Receive and distribute information during session of the General Assembly and serve as a telephone contact for the District with KRTA’s volunteer advocates.

IV. Arrange for the completion of the District Association Recognition Program form and mail to the KRTA office by March 15.
DISTRICT ASSOCIATION LEADERSHIP MEETINGS
PROCEDURES

1. The District President and Executive Council member will set the meeting dates at the annual District Planning meeting.

2. The District President will notify the Local Association Presidents of the meeting date and ask that five people, preferably the President, President Elect and three Committee Chairpersons attend.

3. The District President will arrange for lunch in conjunction with the meeting.

4. Payment for the meal will be made by the District.

5. The District President or Treasurer will submit the Reimbursement Form to the KRTA office showing District name, date of the meeting, name of each Local Association represented, and names and office held up to five persons who attended from each Local. Maximum four meetings per year.

   It is anticipated that the District will pay the meal cost in excess of $16.00 per person and that the Local or District Association will pay mileage to the meetings for one automobile per Local.

   The meeting agenda should include a review of the reports and items of the business from the Executive Council meeting and any additional reports and/or other issues which need to be brought to the attention of the leaders in the Local Associations.
## DISTRICT ASSOCIATION LEADERSHIP MEETING

### REIMBURSEMENT

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### REQUEST

**MEETING DATE**

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AMOUNT DUE TO DISTRICT
$16.00 x ____________________ = ____________________ / ______/ ______

TOTAL ATTENDING REIMBURSEMENT DUE DATE
Please return reimbursement check to the following person:

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<thead>
<tr>
<th>NAME</th>
<th>STREET &amp; NUMBER OR BOX &amp; ROUTE</th>
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</thead>
<tbody>
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CITY STATE ZIP CODE

( ) District President’s Signature Phone Number

This form should be submitted to KRTA (7800 Leaders Lane Louisville KY 40291) to request reimbursement for a maximum of five (5) persons from each local association attending the District Leadership Meeting held following the KRTA Executive Council Meeting—maximum four (4) meetings per year. The local president, president-elect, and chairpersons of the Membership, Health & Insurance and Legislative Committees should attend the District Leadership Meetings.
DISTRICT ASSOCIATION RECOGNITION PROGRAM

______________________________________________
District Name

PURPOSE:
The purposes of this program are two-fold:
1. To encourage district associations to support the programs and goals of KRTA.
2. To recognize those district associations that are most successful in supporting-and carrying out those programs and goals.

PROCEDURE:
The District 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.

*The completed form must be returned to the KRTA office by March 15.

District 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:

1. * District Members _____ (Number of district dues paying members in your district RTA)

2. Holds 4 district Leadership meetings annually following Executive Council meetings  45 points  ____________

3. Provides funds for a District Scholarship Program  20 points  ____________
   or
   Contributes $30 or more to the Kimbler Foundation  10 points  ____________
   and
Contributes $30 or more to Bourgard Foundation 10 points ____________

4. Achieved assigned membership percentage goals. “Yes, We Did Award” 10 points ____________

5. Achieved greatest gain in members. "Top Hat Award" 10 points ____________

6. Submits District Volunteer of the Year Candidate 40 points ____________

7. A total of at least 5 officers and/or committee chairs attend the Fall Workshop. 45 points ____________

8. Officers are elected for two-year terms prior to July 1 of the year they are to begin serving and notice is sent to the KRTA office. (If the District has a President Elect or Vice-President who automatically becomes President, a two-year term is not required). 40 points ____________

9. The District President attends the annual Presidents' meeting held in July and the State Convention held in April. 45 points ____________

10. Maintains active committees and/or chairpersons in the following areas: Health & Insurance, Legislation, Membership/Pre-Retirement: 45 points ____________

11. Makes periodic contacts with local legislators and/or Congressional delegation concerning current issues. 45 points ____________

______________________________ __________________ __________________
District Association Date President

* Required
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

Lisa Petrey-Kirk
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606.297.4959
salyertc@fotthills.net

CENTRAL KY EAST
Pamela Canter
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859.339.8938
butchcanter@windstream.net

Ann Porter
PO BOX 88
Washington, KY 41096
606.584.2510
annporter42@gmail.com
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 Jan 1 – Dec 31 of the current year. 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, 2023. 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 winner’s name and supporting document to the KRTA Office by March 15, 2023.

KRTA Officer in charge of program convenes an Ad Hoc committee to select state winner
DISTRICT OFFICER FORM

DISTRICT: ________________________________  YEAR: _________________________

DISTRICT PRESIDENT:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________

DISTRICT V. PRESIDENT:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________

EXECUTIVE COUNCIL:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________

DISTRICT TREASURER:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________

DISTRICT MEMBERSHIP:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________

DISTRICT LEGISLATIVE:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________

DISTRICT HEALTH & INS:
PHONE: ________________________________
ADDRESS: ________________________________
EMAIL: ________________________________
# EXECUTIVE COUNCIL

## 2022-2023

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Address 1</th>
<th>City</th>
<th>ST</th>
<th>Zip</th>
<th>Phone</th>
<th>D</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROBERT</td>
<td>ADAMS</td>
<td>PO BOX 919</td>
<td>OWINGSVILLE</td>
<td>KY</td>
<td>40360</td>
<td>(606) 210-8283</td>
<td>E</td>
<td><a href="mailto:robert.adams8181@gmail.com">robert.adams8181@gmail.com</a></td>
</tr>
<tr>
<td>SANDRA</td>
<td>ANDERSON</td>
<td>2163 PEELER RD</td>
<td>DEXTER</td>
<td>KY</td>
<td>42036</td>
<td>(270) 978-2574</td>
<td>1</td>
<td><a href="mailto:seanderson@bellsouth.net">seanderson@bellsouth.net</a></td>
</tr>
<tr>
<td>SUE</td>
<td>CRUMPLER</td>
<td>1210 PRADERO DR</td>
<td>FRANKFORT</td>
<td>KY</td>
<td>40601</td>
<td>(502) 395-1775</td>
<td>5</td>
<td><a href="mailto:SUECRUMPLER22@GMAIL.COM">SUECRUMPLER22@GMAIL.COM</a></td>
</tr>
<tr>
<td>TISHANA</td>
<td>CUNDIFF</td>
<td>11181 SOUTH KY 501</td>
<td>LIBERTY</td>
<td>KY</td>
<td>42539</td>
<td>(606) 303-1132</td>
<td>MC</td>
<td><a href="mailto:tishana333@yahoo.com">tishana333@yahoo.com</a></td>
</tr>
<tr>
<td>LAURA</td>
<td>GRAY</td>
<td>PO BOX 3908</td>
<td>MIDWAY</td>
<td>KY</td>
<td>40347</td>
<td>(859) 536-3833</td>
<td>CKW</td>
<td><a href="mailto:LCREATE88@AOL.COM">LCREATE88@AOL.COM</a></td>
</tr>
<tr>
<td>COOKIE</td>
<td>HENSON</td>
<td>115 COLONY RD</td>
<td>MANCHESTER</td>
<td>KY</td>
<td>40962</td>
<td>(606) 598-6439</td>
<td>UC</td>
<td><a href="mailto:COOKIEHENSON@GMAIL.COM">COOKIEHENSON@GMAIL.COM</a></td>
</tr>
<tr>
<td>REBECCA</td>
<td>HUDSON-BROWN</td>
<td>516 S MAIN ST APT K</td>
<td>HENDERSON</td>
<td>KY</td>
<td>42420</td>
<td>(270) 860-0986</td>
<td>2</td>
<td><a href="mailto:BECCABILLBROWN@ATT.NET">BECCABILLBROWN@ATT.NET</a></td>
</tr>
<tr>
<td>MARY</td>
<td>HUNT</td>
<td>11883 BENT BRANCH RD</td>
<td>PIKEVILLE</td>
<td>KY</td>
<td>41501</td>
<td>(606) 205-9719</td>
<td>BS</td>
<td><a href="mailto:maryalicehunt@bellsouth.net">maryalicehunt@bellsouth.net</a></td>
</tr>
<tr>
<td>BETTY</td>
<td>MCKINNEY</td>
<td>1978 US HIGHWAY 27 N</td>
<td>FALMOUTH</td>
<td>KY</td>
<td>41040</td>
<td>(859) 322-7205</td>
<td>N</td>
<td><a href="mailto:rogerbetty@live.com">rogerbetty@live.com</a></td>
</tr>
<tr>
<td>TARA</td>
<td>PARKER</td>
<td>8403 OXFORD WOODS CT</td>
<td>LOUISVILLE</td>
<td>KY</td>
<td>40222</td>
<td>(502) 226-0219</td>
<td>JEFF</td>
<td><a href="mailto:TAPA613@AOL.COM">TAPA613@AOL.COM</a></td>
</tr>
<tr>
<td>HENRIETTA</td>
<td>SHEFFEL</td>
<td>1801 LITTLE'S CREEK RD</td>
<td>JACKSON</td>
<td>KY</td>
<td>41339</td>
<td>(606) 272-0193</td>
<td>UK</td>
<td><a href="mailto:hsheffel@gmail.com">hsheffel@gmail.com</a></td>
</tr>
<tr>
<td>MARTHA</td>
<td>STEPP</td>
<td>4082 HODGENVILLE RD</td>
<td>GREENSBURG</td>
<td>KY</td>
<td>42743</td>
<td>(270) 405-3563</td>
<td>4</td>
<td><a href="mailto:stepp_martha@srtc.com">stepp_martha@srtc.com</a></td>
</tr>
<tr>
<td>ANN</td>
<td>UPCHURCH</td>
<td>55 LAKEVIEW DR</td>
<td>STANFORD</td>
<td>KY</td>
<td>40484</td>
<td>(859) 749-5805</td>
<td>CKE</td>
<td><a href="mailto:annupchurch@ymail.com">annupchurch@ymail.com</a></td>
</tr>
<tr>
<td>PARTHENIA</td>
<td>WELLS</td>
<td>4036 CYNTHIANA RD</td>
<td>GEORGETOWN</td>
<td>KY</td>
<td>40324</td>
<td>(502) 863-4012</td>
<td>CKW</td>
<td><a href="mailto:wellsparthenia@gmail.com">wellsparthenia@gmail.com</a></td>
</tr>
<tr>
<td>JANICE</td>
<td>YONTS</td>
<td>232 NORMAN CIR</td>
<td>GREENVILLE</td>
<td>KY</td>
<td>42345</td>
<td>(270) 543-6429</td>
<td>3</td>
<td><a href="mailto:janyonts@yahoo.com">janyonts@yahoo.com</a></td>
</tr>
</tbody>
</table>
2022-2023 KRTA OFFICERS

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

VICE PRESIDENT
Steve Gillespie
(859) 582-1755
stkgillesspie@gmail.com

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

IMMEDIATE PP
William Kelley
(270) 766-7377
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KRTA EXECUTIVE DIRECTOR
Tim Abrams
(502) 231-5802
Tim.Abrams@kraft.org

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

EXECUTIVE COUNCIL

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

Betty McKinney
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Robert "Tate" Adams
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Ann Uphchurch
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Cookie Henson
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cookiehenson@gmail.com

Tishana Cundiff
(Middle Cumberland)
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tishana333@yahoo.com

AARP/KRTA
Specialist
Cebert Gilbert, Jr.
(859) 227-9357
cgilb@bellsouth.net
### KRTA
**EXECUTIVE COUNCIL MEETING DATES**

**2022-2023**

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<td>Monday</td>
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<tr>
<td>Monday</td>
<td>April 17, 2023*</td>
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Meetings, with the exception of the April meeting, will be held at the KRTA Office.

*The April meeting will be held in conjunction with the Annual Convention.
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<th>Account</th>
<th>FY2022 Budget</th>
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<td>46,008</td>
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| 500 | DISTRICT EXPENSE |
| 0501 | Appropriation | 7,000 | 7,000 | 7,000 | - | 0.00% |
| 0502 | Fall Workshop - Food | 13,327 | 378 | 13,327 | - | 0.00% |
| 0503 | Fall Workshop - Travel | 19,708 | 12,058 | 19,708 | - | 0.00% |
| 0504 | Leadership Meetings | 14,595 | 6,508 | 14,595 | - | 0.00% |
| 0505 | District Presidents Travel | 5,500 | 4,126 | 5,500 | - | 0.00% |
| 0506 | New Retiree Recognition | 6,304 | 2,117 | 6,304 | - | 0.00% |
| 500 | TOTAL DISTRICT EXPENSE | 66,434 | 32,186 | 66,434 | - | 0.00% |

| 600 | OFFICERS & EXECUTIVE COUNCIL |
| 0601 | Officer Travel | 5,167 | 1,450 | 5,167 | - | 0.00% |
| 0602 | Executive Council Travel | 8,500 | 4,305 | 5,928 | (2,572) | -30.26% |
| 600 | TOTAL OFFICERS & EXECUTIVE COUNCIL | 13,667 | 5,754 | 11,095 | (2,572) | -18.82% |

| 700 | STAFF |
| 0701 | Executive Salaries | 114,278 | 128,418 | 135,502 | 21,224 | 18.57% |
| 0702 | Secretaries Salaries | 79,409 | 63,579 | 60,225 | (19,184) | -24.16% |
| 0703 | Fringe Benefits | 0 | - | - | - | 0.00% |
| 0704 | Payroll Taxes | 14,817 | 14,688 | 14,973 | 156 | 1.05% |
| 0705 | Staff Travel | 6,767 | 8,217 | 6,767 | - | 0.00% |
| 0706 | Unemployment Insurance | 1,800 | 555 | 1,800 | - | 0.00% |
| 0707 | 401k Accounts | 18,599 | 15,800 | 19,173 | 574 | 3.09% |
| 0708 | Medical Reimbursement Accounts | 2,400 | 2,400 | 2,000 | (400) | -16.67% |
| 0709 | Payroll Expenses | 410 | 284 | 410 | - | 0.00% |
| 700 | TOTAL STAFF | 238,480 | 233,940 | 240,850 | 2,370 | 0.99% |

| 800 | TRANSFERS & REFUNDS |
| 0802 | Refunds | - | - | (16) | (16) | 0.00% |
| 0803 | Donations | 200 | 1,100 | 200 | - | 0.00% |
| 0804 | Scholarships | 8,300 | 8,300 | 8,300 | - | 0.00% |
| 800 | TOTAL TRANSFERS & REFUNDS | 8,500 | 9,394 | 8,484 | (16) | -0.19% |

| 815 | DEPRECIATION EXPENSE |
| 900 | GRANTS TO LOCALS | $ 3,600 | $ 3,300 | $ 3,600 | - | 0.00% |

**Total Expenditures** | $ 659,570 | $ 597,456 | $ 668,070 | $ 8,500 | $ 7589.17%

**General Fund Revenue less Dividend Income** | $ 668,070 | $ 675,714 | $ 668,070 | $ - | 0.00%

**General Fund Expenditures** | 668,015 | $ 597,456 | $ 668,070 | $ 55 | $ 0.01%

**Net Ordinary Income** | 55 | $ 78,258 | $ - | - | -
Notes:

Revenue based on membership of 31,000
Provides for purchase of Directors & Officers Liability Insurance for Executive Council members, state officers and Ad/Min staff
Provides for annual license fee for support of KRTA database program - $5,300
Provides a $5 per day raise for Executive Director, Newspaper Editor, and Events Coordinator
Provides an additional week’s vacation to the Executive Director
Provides a $5,000 raise for Office Manager and Deputy Executive Director
Eliminates the position of receptionist. We will monitor the office operations for 6 months and add a part-time position if necessary in January
Provides a 10% match of employee’s salary to employee’s KRTA 401k plan if employee makes a minimum 2% of salary contribution (Eligible to participate in association’s 401k plan after 12 consecutive months of employment with KRTA)
Provides Medical Reimbursement Account program at $400 per eligible employee (Eligible to participate in association’s Medical Reimbursement program after 12 consecutive months of employment with KRTA)
Provides for closing the office on the Wednesday before Thanksgiving Holiday
Provides for closing the office on Oaks Day
Provides for accumulation of Sick Leave to 82 days (maximum)
Provides for a Sick Leave Buyout Program - After 10 years of continuous service, a KRTA employee who leaves the association is eligible for a 30% buyout of accumulated sick leave (100 days maximum).
Provides for Membership Recruitment Incentive program
Provides District Appropriation - $500 per district
Provides District Leadership Meeting meal reimbursement - $14 per attendee
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<th>CONTACT PERSON</th>
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<td>Wildwood Country Club 5000 Bardstown Rd.</td>
<td>Susan Thurman</td>
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<td>502-386-2555</td>
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<td>Boone Tavern</td>
<td>Pam Canter</td>
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<td>Scott County Public Library</td>
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<td>Lori Flerlage</td>
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<td>Thurs. Sep 1</td>
<td>Shelbyville Conference &amp; Welcome Center</td>
<td>Cassandra McBurney</td>
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<td>Sandra Rudolph</td>
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<td>Susan Weatherford</td>
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<td>HCS - EC3 Center</td>
<td>Patty Evans</td>
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<td>Jenny Wiley State Park</td>
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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.
THE BOURGARD PROGRAM GUIDELINES

MISSION STATEMENT:

Our mission is to give financial assistance to KRTA members in an effort to uplift their quality of life when a need or emergency impedes their life.

PURPOSE:

The purpose of this program is to address and provide assistance for an immediate financial need of a KRTA member who is undergoing temporary or emergency hardship. This help is intended for a one-time, short term need and not for extended support. The maximum amount awarded will be one thousand dollars ($1000) per application.

ELIGIBILITY:

A KRTA member receiving a pension from TRS who has encountered a short-term financial hardship may apply for a grant. Examples of these needs may include, but are not limited to housing expenses, health care, transportation, legal assistance, nutrition.

HOW TO APPLY:

Applications can be submitted at any time. The application may be initiated by a KRTA member or designee. The Bourgard Committee will consider the application and determine if the grant will be awarded.

After completion, submit the application to:

Kentucky Retired Teachers Association
Emily Carey, Office Manager
7800 Leaders Lane
Louisville, KY 40291

MISCELLANEOUS:

Requested funds will be awarded in a timely manner.

At this time, there is no set number of grants that will be awarded. Funds may dictate the availability of grants.

Applications will remain as confidential as possible and will be retained by the KRTA for as long as is legally necessary.
BOURGARD FUND APPLICATION

Our mission is to give financial assistance to KRTA members to help uplift their quality of life when a need or emergency impedes them.

Complete Section 1 and Section 2, if applicable, and return to:
Kentucky Retired Teachers Association, 7800 Leaders Ln., Louisville, KY 40291

SECTION 1
Grant Seeker Name: ___________________________ Phone: _____________
Current Address: _____________________________ City: _____________________
State: ______ Zip: _____________ Email Address: ___________________________________________

Is the grant seeker a KRTA member in good standing for at least 5 years?
________Yes        _______No

Is the grant seeker receiving a TRS pension? _______
TRS Number: _________________________

Amount requested (the fund has a $1000 maximum): __________

Please describe how the money requested will be spent: (Please include any supporting documentation you deem helpful.)
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________
________________________________________________________________________________________

Check payable to: (If requesting a bill be paid include a billing statement for direct payment purposes.)
________________________________________________________________________________________

How would you like to be notified of the committee’s decision?
______Email ______ Phone  _____ Mail

SECTION 2
To be completed only if Section 1 is completed by someone other than the Grant Seeker.
Name of Person Completing Application: _______________________ Phone: _________________
Address: ___________________________________ City: _____________State: _____Zip: _______
Email Address _____________________________________________________________________

SECTION 3 For Foundation Office Use Only
_______ Approved  _______ Denied  _______ Not Eligible  _______ More Information Required
KRTA Representative Signature: __________________________________________
Date Received: _________________ Date Processed: _______________
Check Number: ____________

The information on this application will remain confidential.

*If your financial situation improves, please consider donating to the Bourgard Fund in the future.*
KRTA CONSTITUTION

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.
By-Laws of the
Kentucky Retired Teachers Association

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.

**KRTA PRESIDENTIAL ROTATION**

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<tr>
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<td>2018-19</td>
<td>Eastern</td>
<td>2025-26</td>
</tr>
<tr>
<td>Second</td>
<td>2019-20</td>
<td>First</td>
<td>2026-27</td>
</tr>
<tr>
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<td>2020-21</td>
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<td>2027-28</td>
</tr>
<tr>
<td>Fourth</td>
<td>2021-22</td>
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<td>2023-24</td>
<td>Big Sandy</td>
<td>2030-31</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Third</td>
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</tr>
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</table>

**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
Legislative Committee

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Address</th>
<th>City</th>
<th>St</th>
<th>Zip Code</th>
<th>Home Phone</th>
<th>District</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
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<td>ADAMS</td>
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<td>PLEASUREVILLE</td>
<td>KY</td>
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<td>(502) 750-1398</td>
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<td><a href="mailto:SWEETHOMESPUN@ICLOUD.COM">SWEETHOMESPUN@ICLOUD.COM</a></td>
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<td>KY</td>
<td>40360</td>
<td>(606) 210-8283</td>
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<td>BELL</td>
<td>525 LYNN DR</td>
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<td>5</td>
<td><a href="mailto:coachphillipbell54@gmail.com">coachphillipbell54@gmail.com</a></td>
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<tr>
<td>DANIEL</td>
<td>BRANSON</td>
<td>PO BOX 418</td>
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<td>(502) 641-5667</td>
<td>JEFF</td>
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<tr>
<td>KIMBERLY</td>
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<td>(270) 378-2399</td>
<td>MC</td>
<td><a href="mailto:kagoodin@icloud.com">kagoodin@icloud.com</a></td>
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<tr>
<td>KAREN</td>
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<td>(606) 295-9211</td>
<td>UK</td>
<td><a href="mailto:kayseegee@yahoo.com">kayseegee@yahoo.com</a></td>
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<tr>
<td>JON</td>
<td>HALL</td>
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<td>FRANKLIN</td>
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<td>42134</td>
<td>(270) 776-4161</td>
<td>3</td>
<td><a href="mailto:schoolhr2@gmail.com">schoolhr2@gmail.com</a></td>
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<tr>
<td>JOHN</td>
<td>MATTINGLY</td>
<td>65 COUNTRYSIDE EST</td>
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<td>(270) 692-6426</td>
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<td><a href="mailto:MATTINGLYJOHNG@GMAIL.COM">MATTINGLYJOHNG@GMAIL.COM</a></td>
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<td>(859) 472-2271</td>
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<tr>
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<td>KY</td>
<td>42303</td>
<td>(270) 302-7504</td>
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<td><a href="mailto:harold2362@att.net">harold2362@att.net</a></td>
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<tr>
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<td>MARSHALL</td>
<td>WARD</td>
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<td>42071</td>
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<td>(502) 239-1559</td>
<td>CO-CHAIR</td>
<td><a href="mailto:SATRER31@TWCG.COM">SATRER31@TWCG.COM</a></td>
</tr>
</tbody>
</table>
INTRODUCTION

As KRTA members work to preserve the Teachers' Retirement System of Kentucky (TRS) these points are important to remember.

- Retired teachers are not covered by Social Security. There is no financial safety net for Kentucky's retired teachers.
- TRS was established in 1938 because the Social Security Administration (SSA) did not permit Kentucky's retired teachers to participate in the Social Security program.
- TRS pension benefits have a substantial economic impact in Kentucky.

ITEM I: PROMOTE FULL FUNDING OF TRS’ ANNUITY AND MEDICAL INSURANCE FUNDS.

COMMENT: Full funding in a timely manner is required to keep the annuity fund in sound fiscal condition. Maintaining the medical insurance fund per HB 540 (aka Shared Responsibility as enacted in 2010) requirements is essential to the financial well-being of our members. TRS members are meeting their Shared Responsibility (HB 540) obligations as are others. The Shared Responsibility plan is a national model for retiree health care funding.

ITEM II: MAKE NO FURTHER CHANGES TO THE TRS BOARD OF TRUSTEES AS IT IS PRESENTLY CONSTITUTED AND OPPOSE EFFORTS TO TAKE FIDUCIARY DECISIONS AWAY FROM THE TRS BOARD.

COMMENT: The General Assembly passed SB2 during the 2017 legislative session. SB2 added two governor appointees to the TRS Board of Trustees. To date the Board of Trustees, acting as a semi-independent state agency, has a record of 78 years of successful management that is unsurpassed in state government. The Board of Trustees (a majority of whom are elected by active and retired teachers) employs experienced, competent investment consultants to advise them on all matters pertaining to investments and its fiduciary responsibilities.

ITEM III: MAINTAIN TRS AS A DEFINED BENEFIT GROUP RETIREMENT PLAN FOR ALL KENTUCKY PUBLIC SCHOOL TEACHERS

COMMENT: A retiree cannot outlive his/her pension under a Defined Benefit (DB) Group Retirement plan, as is possible with a Defined Contribution (DC) Individual Savings account even with a Social Security safety net. Since Kentucky’s retired teachers do not have a Social Security safety net, it is vital that our DB group retirement plan continues. Also, research shows that DC plans may be up to 46 percent more costly to manage and maintain than DB plans.

ITEM IV: OPPOSE STATE TAX REFORM LEGISLATION THAT UNFAIRLY BURDENS KENTUCKY’S PRIVATE AND PUBLIC SECTOR RETIREES.

COMMENT: Cutting retirement income by raising the amount of retirement income subject to state income tax or reducing tax exemptions would be ill-timed and would be unfairly burden Kentucky’s current retirees who have no time to pivot their retirement strategy.
ITEM V: SUPPORT LEGISLATION REQUIRING LONG-TERM CARE (LTC) INSURANCE CARRIERS TO SUBMIT RATE INCREASES TO THE ATTORNEY GENERAL AS WELL AS THE DEPARTMENT OF INSURANCE AND ALLOW INTERVENTION BY THE ATTORNEY GENERAL.

COMMENT: During the past eleven years, the Kentucky Department of Insurance (KDOI) has permitted huge rate increases (i.e., 111%) by long-term care insurance carriers. The increases are intolerable for individuals on fixed incomes. Unlike auto and homeowner policy holders, LTC policy holders do not have the option of changing insurance companies.

ITEM VI: SUPPORT REPEAL OF THE WINDFALL ELIMINATION PROVISION (WEP) AND THE GOVERNMENT PENSION OFFSET (GPO) PENALTIES. OPPOSE EFFORTS AT THE FEDERAL LEVEL TO IMPOSE MANDATORY SOCIAL SECURITY ON TRS MEMBERS.

COMMENT: If TRS contribution rates are reduced by 12.4% so that the combined TRS and social security rate is maintained at the present level, the benefit actuarial formula for active teachers would have to be reduced from 2.5% to less than 1.0%. The result would greatly reduce overall benefits for current and future teacher retirees. The WEP and GPO penalties are particularly harmful to individuals who make a midcareer decision to become a teacher in Kentucky.

ITEM VII: SUPPORT THE 2022-23 LEGISLATIVE PRIORITIES OF THE NRTA/AARP STATE LEGISLATIVE COMMITTEE AND/OR OTHER GROUPS REPRESENTING SENIOR CITIZENS WHICH ARE NOT IN CONFLICT WITH THE POSITION OF KRTA.

COMMENT: Supporting issues of particular interest to retired teachers such as retirement security, predatory lending, increased home and community-based health and living services, and long-term care regulations benefit our members.
<table>
<thead>
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<td>SHEILA</td>
<td>CARSON</td>
<td>3304 INDIAN LAKE DR</td>
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<tr>
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<td>7303 HWY 762</td>
<td>PHILPOT</td>
<td>KY</td>
<td>42366</td>
<td>(270) 729-4218</td>
<td>2</td>
<td><a href="mailto:norma.jean49@icloud.com">norma.jean49@icloud.com</a></td>
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<tr>
<td>LANA</td>
<td>COMBS</td>
<td>200 DUSTY RD</td>
<td>MOREHEAD</td>
<td>KY</td>
<td>40351</td>
<td>(606) 784-6161</td>
<td>E</td>
<td><a href="mailto:lanacombs49@gmail.com">lanacombs49@gmail.com</a></td>
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<tr>
<td>KAREN</td>
<td>GILBERT</td>
<td>766 BOONE CREEK RD</td>
<td>STANTON</td>
<td>KY</td>
<td>40380</td>
<td>(859) 227-6537</td>
<td>CKE</td>
<td><a href="mailto:karenhcgilbert@gmail.com">karenhcgilbert@gmail.com</a></td>
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<tr>
<td>WANDA</td>
<td>MOLLETT</td>
<td>7672 KY ROUTE 40E</td>
<td>WILLIAMSPORT</td>
<td>KY</td>
<td>41271</td>
<td>(606) 789-5041</td>
<td>BS</td>
<td><a href="mailto:BOBANDWANDA@BIGSANDYBB.COM">BOBANDWANDA@BIGSANDYBB.COM</a></td>
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<tr>
<td>DEBRA</td>
<td>PAYNE</td>
<td>8702 S KY 11</td>
<td>BARBOURVILLE</td>
<td>KY</td>
<td>40906</td>
<td>(606) 546-8394</td>
<td>UC</td>
<td><a href="mailto:BLUMOONKY40906@YAHOO.COM">BLUMOONKY40906@YAHOO.COM</a></td>
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<tr>
<td>SHIRLEY</td>
<td>RYAN</td>
<td>2060 GRIDER HILL DOCK RD</td>
<td>ALBANY</td>
<td>KY</td>
<td>42602</td>
<td>(606) 387-7480</td>
<td>MC</td>
<td><a href="mailto:shirleyryan@windstream.net">shirleyryan@windstream.net</a></td>
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<tr>
<td>JANET</td>
<td>SOGAR</td>
<td>36 AMHERST CT</td>
<td>FLORENCE</td>
<td>KY</td>
<td>41042</td>
<td>(513) 476-7434</td>
<td>N</td>
<td><a href="mailto:JANETSOGAR@GMAIL.COM">JANETSOGAR@GMAIL.COM</a></td>
</tr>
<tr>
<td>ANITA</td>
<td>THOMAS</td>
<td>842 WE LIKE IT LN</td>
<td>GRACEY</td>
<td>KY</td>
<td>42232</td>
<td>(270) 885-6252</td>
<td>1</td>
<td><a href="mailto:THOMASANITA@BELLSOUTH.NET">THOMASANITA@BELLSOUTH.NET</a></td>
</tr>
<tr>
<td>PAMELA</td>
<td>NAPIER</td>
<td>PO BOX 927</td>
<td>BOWLING GREEN</td>
<td>KY</td>
<td>42102</td>
<td>(270) 991-5848</td>
<td>3 (WARREN CTY)</td>
<td><a href="mailto:pamela.napier@gmail.com">pamela.napier@gmail.com</a></td>
</tr>
<tr>
<td>SHERRY</td>
<td>RADFORD</td>
<td>146 SPRING LN</td>
<td>BURKESVILLE</td>
<td>KY</td>
<td>42717</td>
<td>(270) 864-9590</td>
<td>3 (MAIN CONTACT)</td>
<td><a href="mailto:sherryradford94@gmail.com">sherryradford94@gmail.com</a></td>
</tr>
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<td>VACANT</td>
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<td>PATSY</td>
<td>YOUNG</td>
<td>418 RIDGECREST RD</td>
<td>ELIZABETHTOWN</td>
<td>KY</td>
<td>42701</td>
<td>(270) 765-7964</td>
<td>4</td>
<td><a href="mailto:pmyoung1@windstream.net">pmyoung1@windstream.net</a></td>
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<tr>
<td>REBECCA</td>
<td>WOODS</td>
<td>108 DELAWARE CIR</td>
<td>CARROLLTON</td>
<td>KY</td>
<td>41008</td>
<td>(502) 732-9020</td>
<td>5</td>
<td><a href="mailto:bwoods22222@gmail.com">bwoods22222@gmail.com</a></td>
</tr>
<tr>
<td>*BETTY</td>
<td>HESTER</td>
<td>196 GRANK OAK BLVD</td>
<td>SHEPHERDSVILLE</td>
<td>KY</td>
<td>40165</td>
<td>(502) 957-2305</td>
<td>*CO-CHAIR</td>
<td><a href="mailto:betty.hester@krta.org">betty.hester@krta.org</a></td>
</tr>
<tr>
<td>*DEBORAH</td>
<td>MURRELL</td>
<td>2805 ALICE AVE</td>
<td>LOUISVILLE</td>
<td>KY</td>
<td>40220</td>
<td>(502) 387-7472</td>
<td>*CO-CHAIR</td>
<td><a href="mailto:dasailboat@msn.com">dasailboat@msn.com</a></td>
</tr>
</tbody>
</table>
KRTA OFFICE MEMBERSHIP PROCEDURES

JUNE

First week of June—All cash members are made inactive, and all ADD (Automatic Dues Deduction) 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 who have been retired 9 years or less 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 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.

All nonmembers, retired 10 years or more who have never joined KRTA, have been moved to a category “Not Interested.” If they do decide to join, they will be placed back on the membership list.

Membership lists are titled Member and Nonmember.

**DAILY**

Memberships are received and processed daily. A Membership Card and green sheet are 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.

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 any time by calling the KRTA office.

Other documents can be mailed—such as KRTA brochure, 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.
KRTA Membership Committee Responsibilities

The purpose of the Membership Committee is to Recruit, Retain, and Re-enlist members for the local and district RTA and KRTA. For its success, the cooperative support of all officers and the general membership is needed.

District Membership Chairs: Responsibilities

1. During the month of June and before June 30th, contact the local membership Chair inquiring their leadership role for the next year. If they are stepping down, secure the name of the person replacing them. In some situations, the local president has been doing the membership work. In these situations, encourage them to enlist a local membership chair by July 1. Follow up July 1, with a phone call to the local president to obtain the name of their local membership chair. Combine a list of local membership chairs, with updated address, phone numbers including cellular numbers, and email addresses. Be sure to get the updated list to KRTA office by July 15th.

2. Attend State Membership Meeting in July.

3. Contact local membership chairs to obtain updated email addresses for members and have them check to be sure that is the correct address that KRTA has on file. Encourage local chairs to develop a phone tree for local members who do not have e-mail or text. Some of the members will not get the updated information if they do not have technology.

4. One-on-one contact is important. But don’t wait for meetings... Technology should be used to contact chairs: email, text, or phone your local chairs on a regular basis with any new information. Create an email or text list to quickly contact local membership chairs.

5. Meet with and invite all local membership chairs to district RTA meetings, KRTA Fall Workshop, and KRTA State Convention. If the meetings are virtual, your attendance is still very important. Try to make a personal contact to local chair to invite them to the district meeting.

6. Conduct a local membership chair meeting (15-30 minutes) prior to district meetings. Check on their needs: white cards, cash forms, green sheets, lists. Find out how you can help them to reach their non-members. If district meeting Is not in person have a short district chair/ local chair Zoom meeting.

7. Give report of status and any new information concerning membership at each district meeting. Hand out report to members before meeting. District
membership chairs should give out current membership lists to each local chair at the meetings. Remind the locals how to use the different lists that are available Members, Non-members, last county taught and year of retirement.

8. Be sure to send each of the local chairs the goal for the district and their local, so, they can see what they need in order to achieve their goal.

9. During Membership Drive Campaign contact each local membership chair preferably by phone.

10. Develop a list of reasons for joining the local, district, and state associations. (Each chair adjusts the list to your area and locals) the green sheet is factual sheet of information.

11. Check monthly for new retiree lists. Always encourage your general membership to make personal contacts with new retirees whenever possible. Call office manager at KRTA office to get this.

12. On a monthly basis get the % report for the district from KRTA and email the latest % to your local chairs. Keep them abreast of their success in reaching their membership goals.

13. Prepare a report of how each of your locals worked to reach their membership goals for the State Membership Committee in July. A report should be sent to the Executive Director prior to the actual meeting. Encourage each of your locals to contribute info to you for your report about what works and doesn’t work for them. Sharing these ideas is important on local and state level as well. Communication is vital to successes. Sometimes we find out something that worked for another district or local that will be pertinent to our districts or local. Remember, membership is everybody’s business. Membership is the life-blood of KRTA.

14. Remember to encourage the local chairs as they are accomplishing their goals. That “pat on the back” is so necessary. KRTA leaders are volunteers. The encouragement and support of one volunteer to another will go a long way to develop and strengthen leadership.

15. Be a better KRTA Ambassador by staying informed with current information!
Local Membership Chair

The purpose of the Membership Committee is to Recruit, Retain and Re-enlist members for the local and district RTA and KRTA. For success, the cooperative support of all officers and the general membership is needed.

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

May

Sometime before school ends, get a list of teachers who are retiring and addresses from the district office, or phone the local schools to inquire about retirees or persons close to retirement. The local school secretary will usually be able to give you that information.

You may be able to personally meet with them to invite them to join. Take a white ADD card to the schools to meet each retiree. If possible, get the upcoming retiree to fill out the white card before you leave. Offer to mail the card for them... even if their official date isn’t until July 1 or a little later. KRTA office will hold it, and when KRTA receives the list from TRS, they will process it at that time.

Official year for membership is July 1st – June 30th

Early June or July, contact KTRA at 1-800-551-7979. KRTA office manager will help you with whatever you need.

Ask for:
• List of active and non-members in KRTA in your county
  (Can get a PDF or Excel list if you want on your computer); or they will mail a list to you if needed)
• Preprinted self-stick address labels are available from the KRTA office upon request for members and non-members. You may want to personally address the ones to the non-members. (They are more likely to open a hand addressed envelope rather than a pre-printed label). With the Excel list you may print your own labels.
• Request or download from the KRTA website ADD (Automatic Dues Deduction) cards to send to all the non-members and newly retired teachers. Print the county name on the back of the card and your local will earn a $5 credit. It is called One-for-One Campaign. That is paid out one year behind, so any received this year the $5 would be totaled and mailed to your local the next year. It doesn’t only have to be for a new member, it can also be for an active member that is being converted from cash to ADD. Contact KRTA office no later than May 1 to verify total number of cards with county name.
Contact the KRTA office for updated membership lists throughout the year. Remember your membership will fluctuate throughout the year with new retirees and deceased members. The second week of each month is a good time to ask for new list. Retirees are not added to the KRTA lists until a month and usually at least a week after the actual date of retirement. Example: July 1 retiree would not show up on the list until August.

Request an Excel list of your retirees with the date retired and county retired from. The list may contain names who retired from a state facility which will appear on the list as a number. The number will indicate the facility in which they worked.

Use current members as liaisons to the new retirees to encourage them to join. Link together retirees who worked in the same building or central office staff with non-members who have not joined. If there is a university, community college, or technical school in your area, link retirees from these organizations together.

Upon obtaining your membership list from KRTA regarding members and non-members, double check your list. Contact non-members and encourage them to join both the local and state organizations.

Follow up the KRTA June and August mailings to new retirees and non-members who have not joined with a personal communication.

Give Them Reasons to Join:
  • Remind retirees about the COLA increases yearly and health insurance benefits they receive that many retiree groups do not.
  • Talk about how KRTA being one of the largest retiree organizations.
  • Remind retirees that KRTA looks after their benefits.
  • Use the blue Legislative sheet, the green Membership sheet, and the yellow Health and Insurance sheet as recruiting tools.

Your personal contact may be what convinces them to join. Use a chart to record your contacts. This way you do not end up contacting someone who wished not to be contacted; document this on your chart.

Join KRTA online. www.krta.org
Join KRTA by phone 1-800-551-7979 or 502-231-5802
Join KRTA by mail. 7800 Leaders Lane, Louisville, KY 40291-3234

Attend district meetings and Fall Workshop
Attend KRTA State Convention
Local Lists contain the following:

Auto – indicates membership by automatic dues deduction (white card)

Cash – indicates membership by cash payment

Non-member – anyone who has not joined within 10 years of retirement.

“O” indicates the person was never a member of KRTA

“L” means they were a member, but have not paid their dues for the ongoing year... dues have lapsed.

October (last Friday) all ADD cards (white cards) need to be in the KRTA office in order for dues to be deducted from their TRS paycheck. If need be scan the front and back of the card and email them to the office to get them enrolled as an active member before the deadline.

During the months from October through the January deadline, deceased members will not be removed from your lists. They will be removed at the end of January or first of February.

Call your district membership chair or state co-chair to speak at your meeting.
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@ktra.org
www.ktra.org

118 Local Associations
In 14 Districts

MEMBERSHIP COMMITTEE
Betty Hester & Debby Murrell, Co-Chairs

Anita Thomas, First
Marianne Leet, CKW
Norma Chapman, Second
Janet Sogar, Northern
Sheila Carson, Jefferson
Wanda Mollett, Big Sandy
Pamela Napier, Third
Sherry Radford, Third

Patsy Young, Fourth
Michael Caudill, Up Ky River
Rebecca Woods, Fifth
Lana Combs, Eastern
Shirley Ryan, Mid Cum
Karen Gilbert, CKE
Debra Payne, Up Cum
KENTUCKY RETIRED TEACHERS ASSOCIATION
MEMBERSHIP ENHANCEMENTS
7800 Leaders Lane Louisville, KY 40291
(502) 231-5802 or 1-800-551-7979
info@k rsa.org www.krsa.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

- 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. Kimberly 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 Avesis 1-800-828-9341
  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/hrs
- Express Scripts, Medicare Part D 1-877-866-5834 www.express-scripts.com/
- KYRx Coalition 1-855-218-5979 www.kyrx.org
- Corielle Life Science DNA Testing 1-888-454-9024 www.coriell.com/hrs
- Silver Sneakers 1-888-423-4632 www.silversneakers.com/StartHere
- RENEW 1-888-219-4602
- Virtual Doctor 1-855-615-8335 www.uhcvirtualvisits.com
- United HealthCare Hearing 1-866-445-2071 www.UHCHearing.com/Retiree

TRS (KEHP) 65 and under NOT Medicare Eligible

- Medical Anthem BCBS 1-844-402-KEHP www.caremark.com/
- Prescription CVS Caremark 1-866-601-6934
- 24/7 Nurse Line 1-877-636-3720
- KYRx Coalition 1-855-218-5979 www.kyrx.org
- SmartShopper 1-855-869-2133 www.smartshopper.com
- Living Well Promise 1-866-746-1316 www.kehplivingwell.com
### 2022 – 2023
#### HEALTH/INSURANCE COMMITTEE

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Address</th>
<th>City</th>
<th>St</th>
<th>Zip</th>
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<th>Email</th>
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<tr>
<td>PATRICIA</td>
<td>BINGHAM</td>
<td>104 E PARK AVE</td>
<td>PINEVILLE</td>
<td>KY</td>
<td>40977</td>
<td>(606) 337-5990</td>
<td>UC</td>
<td><a href="mailto:FSDIR@HOTMAIL.COM">FSDIR@HOTMAIL.COM</a></td>
</tr>
<tr>
<td>ALLIE</td>
<td>BRADSHAW</td>
<td>705 JONES LN</td>
<td>FRANKFORT</td>
<td>KY</td>
<td>40601</td>
<td>(502) 223-7083</td>
<td>5</td>
<td><a href="mailto:fbradshaw789@gmail.com">fbradshaw789@gmail.com</a></td>
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<tr>
<td>MARCIA</td>
<td>CAUDILL</td>
<td>392 CIVIL WAR GAP</td>
<td>CARCASSONNE</td>
<td>KY</td>
<td>41804</td>
<td>(606) 633-9691</td>
<td>UK</td>
<td><a href="mailto:marcia@tvscable.com">marcia@tvscable.com</a></td>
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<td>JANE</td>
<td>DALTON</td>
<td>443 KENDRICK AVE</td>
<td>MONTICELLO</td>
<td>KY</td>
<td>42633</td>
<td>(606) 348-4825</td>
<td>MC</td>
<td><a href="mailto:JANE.DALTON.443@GMAIL.COM">JANE.DALTON.443@GMAIL.COM</a></td>
</tr>
<tr>
<td>NANCY</td>
<td>DULEY</td>
<td>120 LIZA LN</td>
<td>CRITTENDEN</td>
<td>KY</td>
<td>41030</td>
<td>(859) 428-2091</td>
<td>N</td>
<td><a href="mailto:ngduley@gmail.com">ngduley@gmail.com</a></td>
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<tr>
<td>GINGER</td>
<td>HOLCOMB</td>
<td>1967 JOHN STRODE RD</td>
<td>GAMALIEL</td>
<td>KY</td>
<td>42140</td>
<td>(270) 457-4756</td>
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<td><a href="mailto:holcomb@scrtc.com">holcomb@scrtc.com</a></td>
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<td>PRINCETON</td>
<td>KY</td>
<td>42445</td>
<td>(270) 625-3957</td>
<td>1</td>
<td><a href="mailto:ginnie.oldham@gmail.com">ginnie.oldham@gmail.com</a></td>
</tr>
<tr>
<td>PEGGY</td>
<td>ORBERSON</td>
<td>144 EDGEWOOD DR</td>
<td>STANFORD</td>
<td>KY</td>
<td>40484</td>
<td>(606) 365-9408</td>
<td>CKE</td>
<td><a href="mailto:peggyorberson@gmail.com">peggyorberson@gmail.com</a></td>
</tr>
<tr>
<td>LUE</td>
<td>PEABODY</td>
<td>3502 BOB DAVENPORT DR</td>
<td>MASONIC HOME</td>
<td>KY</td>
<td>40041</td>
<td>(502) 767-9328</td>
<td>JEFF</td>
<td><a href="mailto:LUEPEABODY@GMAIL.COM">LUEPEABODY@GMAIL.COM</a></td>
</tr>
<tr>
<td>MARY</td>
<td>RUMMAGE</td>
<td>120 5TH ST</td>
<td>LEWISPORT</td>
<td>KY</td>
<td>42351</td>
<td>(270) 295-3335</td>
<td>2</td>
<td><a href="mailto:MRUMMAGE@TDS.NET">MRUMMAGE@TDS.NET</a></td>
</tr>
<tr>
<td>THOMAS</td>
<td>SALYER</td>
<td>PO BOX 1715</td>
<td>PAINTSVILLE</td>
<td>KY</td>
<td>41240</td>
<td>(606) 297-4959</td>
<td>BS</td>
<td><a href="mailto:SALYERTC@FOOTHILLS.NET">SALYERTC@FOOTHILLS.NET</a></td>
</tr>
<tr>
<td>MARGARET</td>
<td>SNEDEGAR</td>
<td>74 SMITH PIKE</td>
<td>FLEMINGSBURG</td>
<td>KY</td>
<td>41041</td>
<td>(606) 849-2646</td>
<td>E</td>
<td><a href="mailto:msnedegar@windstream.net">msnedegar@windstream.net</a></td>
</tr>
<tr>
<td>MARCIA</td>
<td>WITHERSPOON</td>
<td>203 CAVE ST</td>
<td>HORSE CAVE</td>
<td>KY</td>
<td>42749</td>
<td>(270) 786-1562</td>
<td>4</td>
<td><a href="mailto:MARCIAWSPOON@GMAIL.COM">MARCIAWSPOON@GMAIL.COM</a></td>
</tr>
<tr>
<td><em>MARGARET</em></td>
<td>SIMS</td>
<td>145 CASTLETON DRIVE</td>
<td>BARDSTOWN</td>
<td>KY</td>
<td>40004</td>
<td>(502) 510-3131</td>
<td>*CHAIR</td>
<td><a href="mailto:msims4949@yahoo.com">msims4949@yahoo.com</a></td>
</tr>
</tbody>
</table>
# Health Care Benefits Resource Guide

**Kentucky Retired Teachers Association (KRTA)**

**KRTA Health & Insurance Committee**

## Medicare Eligible Health Plan (MEHP)

- Call to order an ID card, start home delivery, refill mail order prescriptions, price a prescription and more. **Express Scripts Drug Patient Care Advocate** 877-866-5834
- Call for help with rejected prescription issues, prior authorization and lower cost drug alternatives. **Know Your Rx Coalition Pharmacist** 855-218-5979
- Call for help with medical claims payment questions, Medicare allowable charges, appeals and provider issues. **UnitedHealthcare Customer Service** 844-518-5877
- Call for questions regarding medical insurance eligibility, how to enroll and insurance premiums. **Teachers’ Retirement System of Kentucky** 800-618-1687
- Call to receive a DNA test kit to help determine if your medications work for you. **Coriell Life Sciences** 888-454-9024

<table>
<thead>
<tr>
<th>Medicare</th>
<th>800-MEDICARE 800-633-4227</th>
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<tbody>
<tr>
<td>Social Security</td>
<td>800-772-1213</td>
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**TRS Website:** www.trs.ky.gov

Below are the specific URLs for 2021, for both the UHC and ESI Summary of Benefits.


## Kentucky Employees’ Health Plan (KEHP)

- Health Insurance Benefits from Anthem call 844-402-KEHP (5347) for questions regarding covered services, providers, or networks. All plan holders must complete the Health Assessment or Biometric Screening by July 1st of each year.
  - **24/7 Nurse Line** at 877-636-3720 for registered nurses available 24 hours a day, 7 days a week to discuss your illness before going to urgent care or the emergency room. The registered nurse will help you determine whether to manage your care at home or see a medical professional. In case of an emergency, call 911.
  - Free access to medical and behavioral health treatment, from board-certified doctors and therapists, virtually through LiveHealth Online at www.livewellonline.com.
  - Prescription Benefits from CVS/Caremark call 866-601-6934 or call the **KNOW YOUR RX COALITION** at 855-218-5979 for pharmacists available to answer questions about medications, identify lower cost prescription alternatives, and contact your doctor if needed.
  - WebMD Health Services at www.kehplivingwell.com. Free program that rewards KEHP members for healthy behaviors. Call them at 866-746-1316
  - **Smart Shopper** [www.smarthshoer.com](http://www.smarthshoer.com) at 855-869-2133. Receive a check up to $500 by using a cost-effective Anthem provider.
  - **HRA Spend Down Card Benefits at Health Equity** at 877-430-5519. Call them if you have lost your card or need to know the balance on the card. Available for CDHP plans only.
  - **TRS Retiree Questions from Teachers’ Retirement System at 800-618-1687 or 502-848-8500.** Website at www.trs.ky.gov.
  - Link to various seminar and webinar presentations including the turning 65 presentations are available at www.trs.ky.gov/home/seminars-workshops.

**Updated:** 09/14/21