



LOCAL PRESIDENT'S HANDBOOK



Providing Direction for 2023-2024



TABLE OF CONTENTS

INTRODUCTION.....3

PRESIDENT’S CHECKSHEET4

PART I: LOCAL ASSOCIATION REPORT FORMS & SUGGESTED ACTIVITIES

Form 1: LOCAL OFFICERS’ REPORT.....8

SAMPLE INSTALLATION9

SAMPLE CERTIFICATE10

Form 2: LOCAL COMMITTEE ASSIGNMENT/SIGN-UP11

Form 3: LOCAL ASSOCIATION RECOGNITION PROGRAM12

Form 4: LOCAL ASSOCIATION PROGRAM SUGGESTIONS15

Contacts: *KRTA Committee Co-Chairs*.....17

Grandparent Essay Contest Guidelines and Entry Forms18

Form 5A NEW RETIREE RECOGNITION PROGRAM - *Explanation*21

Form 5B NEW RETIREE RECOGNITION PROGRAM - *Reimbursement Form*22

2022 KRTA WORKSHOP SCHEDULE.....24

Form 7: KRTA FALL WORKSHOP RESERVATIONS25

COMMITTEE RESPONSIBILITIES - *Explanation*26

Form 8: MEMBERSHIP COMMITTEE RESPONSIBILITIES27

Form 9: LOCAL MEMBERSHIP LIST CORRECTION.....28

Form 10: SAMPLE MEMBERSHIP SOLICITATION LETTER29

Form 11: LEGISLATIVE COMMITTEE RESPONSIBILITIES30

Form 12: COMMUNICATING WITH MEMBERS OF THE GENERAL ASSEMBLY31

Form 13: THE RIGHT WAY & THE WRONG WAY TO WRITE TO LEGISLATORS32

Form 14: HOW TO VISIT YOUR LEGISLATOR33

Form 15: HEALTH/INSURANCE COMMITTEE RESPONSIBILITIES36

Form 17: SAMPLE LOCAL FACT SHEET.....37

Form 18: SAMPLE MEETING AGENDA.....38

Form 19: SAMPLE NEWS RELEASES.....39

Form 20: DELEGATES TO THE DELEGATE ASSEMBLY.....40

VOLUNTEER PROGRAM.....42

Form 21: VOLUNTEER PROGRAM CHART.....44

FRANK R. HATFIELD VOLUNTEER OF THE YEAR AWARD45

PART II: LEARNING ABOUT OUR STATE ASSOCIATION

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.**

KRTA CONSTITUTION.....47

2023-2024 KRTA OFFICERS & EXECUTIVE COUNCIL.....54

2023-2024 KRTA DISTRICT PRESIDENTS.....55

KRTA OFFICE MEMBERSHIP PROCEDURES.....56

KRTA IS IMPORTANT BECAUSE WE ARE ALL IN THIS TOGETHER58

Membership 2023-2024 KEEPING RETIRED TEACHERS ACTIVE..... 59

LOCAL MEMBERSHIP REMINDER.....60

STATE MEMBERSHIP REMINDER.....61

COMBINATION LOCAL /STATE MEMBERSHIP REMINDER(Mailing Procedures)..... 62

INTRODUCTION

This *Local President's Handbook* is provided as a guide for the local association presidents for the 2023-2024 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 2023-2024.

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*). 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*. 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. Complete *New Retiree Recognition Program Reimbursement Form* 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). Call the KRTA office for updated membership lists and labels whenever needed.
- ◆ 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.
- ◆ Health/Insurance: Help keep membership informed on current insurance concerns and healthy lifestyles.

➤ **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.)
 - ◆ Include donations for the N.O. Kimbler Memorial Scholarship Fund and the Bourgard Funs (**a minimum of \$40 for each required for Local Recognition Form.**)
 - ◆ Talley the total number of volunteer hours and list volunteer activities for the local association for the period January 1-December 31.
- Complete *Local Association Recognition Program Form* and send it to the KRTA office by the designated date.
- Elect officers by early June (Send *Local Officers Form* 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.

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: _____

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.

Installation of Incoming Local Officers

Now, let's install your new officers. Will the new officers come forward to be recognized as the leadership of the _____ County RTA for the 2023-24 year. Mr. or Madam President please stand on my right and all other officers please stand on my left.

Address to all Officers Except the President

You have been elected to serve as leaders of the _____ County RTA for the 2023-24 year. Do you promise to perform faithfully all the duties of your respective offices as stated in your RTA's By-Laws?

Answer: "We will"

(Installer will give each a certificate)

Address to the President

_____, you have been elected to serve as president of the _____ County RTA. The membership is to be congratulated upon your selection. You have been chose because of your ability, trustworthiness and leadership skills. It will be your responsibility to lead the organization in all of its endeavors.

_____, do you pledge faithful performance of your duties as president of the _____ County RTA as stated in your local's By-Laws?

Answer: "I will"

(Installer will give the president a certificate)

Address to the Membership

As _____ County RTA members, you have a responsibility to the officers and the organization. Do you pledge loyal support to these officers who have been selected and will you cooperate in making this administration a successful one?

Answer: "We will"

Your duties as members, officers and other local RTA leaders will prove to be a challenge. You have a responsibility to work and plan together; a responsibility of service to your community, and fellowship to each other.

Your president, officers and other local RTA leaders come to you with high hopes, but they can do nothing without your loyal support and cooperation. You can go far and accomplish much if you all work together.

Address to All Members (Officers and Other Members)

May each of you strive "to serve, not to be served," "to recognize the personal dignity and usefulness of the individual," and to work together to keep the _____ County RTA a strong and viable organization that continues to support the education of our youth and the needs of retired teachers.

Please welcome your 2023-24 leaders. Officers you may be seated. Thank you!

Updated: 6/1/21



PRESIDENT

of

_____ County Retired Teachers Association

Installed this ____ day of _____

to fulfill the following responsibilities:

- * Be the executive officer of the local RTA and preside 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

LOCAL COMMITTEE ASSIGNMENT/SIGN-UP

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.

Legislative Committee

_____, Chair

Caring Committee

_____, Chair

Health/Insurance Committee

_____, Chair

Hospitality Committee

_____, Chair

Membership Committee

_____, Chair

Community Service Committee

_____, Chair

Communications Committee

_____, Secretary

Devotion Committee

_____, Chair

Public Relations Committee

_____, Chair

Finance Committee

_____, Treasurer

Program Committee

_____, Chair

Telephone Committee

_____, Chair

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 1, 2 & 3 will be completed at the KRTA office).

The completed form must be returned to the KRTA office 7800 Leaders Lane, Louisville, KY40291 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:

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	_____
or		
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. School Supply | 10 Points | _____ |
| ** (Number of bags of school supplies _____ or \$ _____ contributed) | | |
| Feed Kentucky Program | 10 Points | _____ |
| ** (Number of food items _____ or \$ _____ contributed) | | |
| Other | 10 Points | _____ |
| ** (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 \$40 or more to the Kimbler Scholarship Fund | | |
| | 10 Points | _____ |
| 14. Makes a contribution of \$40 or more to the Bourgard Fund | | |
| | 10 Points | _____ |
| 15. Makes a contribution of \$80 to Kimbler and Bourgard Fund | | |
| | 10 Points | _____ |
| 16. Maintains active committees in the following areas: | | |
| Health and Insurance | 20 Points | _____ |
| Legislation | 20 Points | _____ |
| Membership/Pre-Retirement | 20 Points | _____ |
| 17. Makes periodic contacts with legislators concerning current issues | | |
| Explain Briefly | 20 Points | _____ |
| _____ | | |
| _____ | | |
| _____ | | |
| 18. Distributes local RTA news (printed or electronic) to members (attach a sample) | | |
| | 10 Points | _____ |

LOCAL ASSOCIATION RECOGNITION PROGRAM

19. 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): **Total Hours:** _____

***** 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

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 (Co-Chairs Edwin Cook, III & Margaret Sims)
- Legislation by a representative from KRTA (Co-Chairs Don Hines & Larry Woods)
- Membership by a representative from KRTA (Co-Chairs Betty Hester & Debby Murrell)
- 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 (Draft form available at KRTA office)
- Hospice services offered
- Positive attitude speaker
- Update on KRTA by a KRTA representative
- 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
- Sponsor 55 Alive 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

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

Larry Woods
1427 Kemper Lane
Lancaster, KY 40444
(859) 742-1377/(270) 999-1121
lkw53@windstream.net



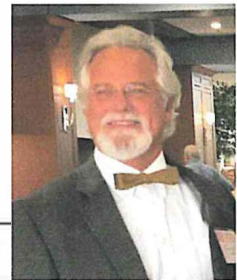
Allan Schuler



Larry Woods

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

LEGISLATIVE



Marshall Ward

HEALTH & INSURANCE CO-CHAIRS

Margaret Head Sims
145 Castleton Drive
Bardstown, KY 40004-2531
(502) 349-0055 / (502) 510-3131
msims4949@yahoo.com



Margaret Sims

HEALTH & INSURANCE

MEMBERSHIP/PRE-RETIREMENT CO-CHAIRS

Betty Hester
1782 West Hebron Lane
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



Betty Hester



Debby Murrell

MEMBERSHIP

CONTACT ANY OF THESE CHAIRS

WHEN YOU NEED SPEAKERS OR ASSISTANCE

AARP/KRTA Grandparent Essay 2023-24

SCHOOL WINNER

County: _____

Student Information

Student Name (as it should appear on award): _____

Grandparent First and Last Name: _____

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 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, 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 visit aarp.org/kygrandparentessay, email cjackson@aarp.org, or call 866-295-7275.





Grandparent of the Year Essay Contest 2023-24 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, 2023**
- **County winner deadline: January 31, 2024**
- **District winner deadline: March 1, 2024**

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.

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 RETIREEES IN ATTENDANCE:

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.

_____ x \$15 = _____
No. of New Retirees in Attendance TOTAL

No. of ADD Cards Signed and Returned: TOTAL

Name of Local Association

Local Unit President's Signature

_() _____
Phone Number

Please return reimbursement check to the following person:

_____/_____
Name Street & Number or Box & Route
_____/_____/_____
City State Zip Code

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

2023 KRTA FALL WORKSHOP SCHEDULE

DISTRICT	DATE	PLACE	CONTACT PERSON
Jefferson County	Fri. Aug 25 10:00 AM (ET)	Wildwood Country Club 5000 Bardstown Rd. Louisville KY	Susan Thurman 1134 Blackthorn Rd Louisville, KY 40299 502-386-2555
Central Ky East	Mon. Aug 28 9:00 AM (ET)	Boone Tavern Berea	Pam Canter 1175 Perry Rogers Rd Lancaster, KY 40444 850-339-8938
Central Ky West	Tues. Aug 29 9:00 AM (ET)	Scott County Public Library 104 Bradford Ln Georgetown, KY 40324	Lisa Petrey-Kirk 5001 Chaplin Rd Willisburg, KY 40078 502-680-0740
Northern	Wed. Aug 30 9:00 AM (ET)	Gardens of Park Hills 1622 Dixie Hwy Park Hills, KY 41011	Lori Flerlage 1000 Independence Pike Dry Ridge, KY 41035 859-824-4882
Fifth	Thurs. Aug. 31 9:00 AM (ET)	Shelbyville Conference & Welcome Center 219 7th Street, Shelbyville, KY 40065	Cassandra McBurney 715 Ghent Eagle S Sanders, KY 41083 502-347-5587
First	Mon. Sep 11 9:00 AM (CT)	Kenlake State Park 542 Kenlake Rd, Hardin, KY 42048	Sandra Rudolph 415 Barnett Rd Eddyville, KY 42048 270-601-1525
Second	Tues. Sep 12 9:00 AM (CT)	223 Third Street Henderson, KY 42420	Susan Weatherford 1290 College Dr Madisonville, KY 42431 270-836-7641
Third	Wed. Sep 13 9:00 AM (CT)	Barren River State Park 1149 State Park Rd. Lucas, KY 42156	Bobbi Porter 107 Southdale Drive Hartford, KY 42347 (270) 256-0195
Fourth	Thurs. Sep 14 8:30 AM (CT) 9:30 AM (ET)	HCS - EC3 Center 200 University Dr, Elizabethtown 42701	Patty Evans 1137 Cave Rd Campbellsville, KY 42718 270-469-5840
Middle Cumberland	Mon. Sep 18 8:30 AM (CT) 9:30 AM (ET)	Pulaski County Public Library 304 S Main St, Somerset, KY 42501	Tishana Cundiff 11181 South KY 501 Liberty, KY 42539 606-303-1132
Upper Cumberland	Tues. Sep 19 9:00 AM (ET)	Pine Mountain State Park 1050 State Park Rd, Pineville, KY 40977	Paula Adams/Sherry Skaggs 340 Greers Chapel Road Harrogate, TN 37752 432-869-8496
Upper Ky River	Wed. Sep. 20 9:00 AM (ET)	LKLP Community Action, Inc. 412 Roy Campbell Dr. Hazard, KY 41701	Karen Griffith 20 Twin Cedar Rd Jackson, KY 41339 606-568-0113
Big Sandy	Thurs. Sep. 21 9:00 AM (ET)	Jenny Wiley State Park 75 Theatre Ct, Prestonburg, KY 41653	Thomas Saylor PO Box 1715 Pikeville, KY 41240 606 297-4959
Eastern	Fri. Sep 22 9:00 AM (ET)	Carter Caves State Park 344 Caveland Dr, Olive Hill, KY 41164	Ann Porter P.O. Box 88 Washington, KY 41096 606 584-2510

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.



KRTA FALL WORKSHOP RESERVATIONS

NAME OF LOCAL ASSOCIATION _____
DATE

ALL WORKSHOPS START TIMES ARE LOCAL TIME. REGISTRATION BEGINS **30** MINUTES PRIOR TO START TIME

PLEASE COMPLETE AND MAIL TO THE CONTACT PERSON FOR YOUR DISTRICT AT LEAST ONE **(1)** WEEK PRIOR TO DATE OF THE WORKSHOP.

LOCAL RTA RESERVATIONS PAID FOR BY AARP (BLUE CARDS):

<u>NAME</u>	<u>COUNTY</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

OTHER MEMBERS ATTENDING AT THEIR OWN OR LOCAL RTA EXPENSE:

<u>NAME</u>	<u>COUNTY</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

USE BACK OF PAGE IF MORE SPACE IS NEEDED.

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.



ACTION!

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
1782 West Hebron Lane
Shepherdsville, KY 40165-7423
502-957-230 or 502-494-91145
betdon1969@aol.com

Debby Murrell
2805 Alice Avenue
Louisville, KY 40220-1703
502-458-5125 or 502-387-7472
DeborahMurrell183@gmail.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.

	SECTION I	
NAME	OMIT FROM COUNTY	ADD TO COUNTY

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.

	SECTION II
NAME	REASON FOR OMITTING

**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.

LEGISLATIVE COMMITTEE RESPONSIBILITY

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

Allen Schuler
 6420 Villa Spring Dr.
 Louisville, KY 40291
 (502) 239-1559
[Satrer31@twc.com](mailto:Satre31@twc.com)

Larry Woods
 1427 Kemper Lane
 Lancaster, KY 40444
 (859) 742-1377
lkw53@windstream.net

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

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 Kentucky
Network

600 Cooper Drive
Lexington, KY 40502-2296
(606) 233-3000



Kentucky Chamber of Commerce
P.O. Box 817 • Frankfort, KY • 40602 • (502) 695-4700

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!

Senator John D. Public
Room 1620
Senate of Kentucky
Frankfort, Kentucky 40601

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 manhole covers to be made of plastic, has been passed by the legislature 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 Right Way



Kentucky Chamber of Commerce
P.O. Box 817
Frankfort, Kentucky 40602
(502) 696-4700

April 1, 1990

The Honorable John Q. Public
Room 1620
Senate of Kentucky
Frankfort, Kentucky 40601

Dear Senator Public:

We would appreciate your efforts to have your bill, SB 1984, reported from committee and enacted into law.

This bill would require all our present heavy metal manhole covers to be replaced with lightweight, noiseless, plastic ones. The change would reduce the incidence of hernias and back strain among maintenance men who are required to lift the present heavier covers.

It would also permit householders to sleep, uninterrupted by the clank of loose covers under traffic. In addition, it would save communities money by reducing shipping costs to a fraction of the present cost, and it would conserve metal.

Most important, it would enable our small plastic factory to immediately add 30 jobs for your constituents, as we gear up to produce the new covers.

Thank you for your consideration.

Sincerely,

John Doe
JDab

Always date your correspondence.

Be respectful.

Give specific, practical reasons.

Add a personalized reason.

Be polite and appreciative.



The Kentucky Network

600 Cooper Drive
Lexington, KY 40502-2296
(606) 233-3000



Kentucky Chamber of Commerce
P.O. Box 817 • Frankfort, KY • 40602 • (502) 696-4700

HOW TO VISIT YOUR LEGISLATOR

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,
- 1' to acquaint a legislator with your views,
- 1' to seek support for or opposition to a specific bill or provision, and/or
- 1' 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. Reconfirm 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.

HEALTH/INSURANCE COMMITTEE RESPONSIBILITIES

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

SAMPLE LOCAL FACT SHEET

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.
- 1' *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.
- 1' *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.
- 1' 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**
- CaringDarlene Stone
- Health/InsuranceLeon Rollins
- MembershipBetty Luther
- Community ServiceHelen 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.

SAMPLE 1

The Sentinel

**Smithton
Brown County Retired Teachers Association**

**September 1, 20XX
Contact: Betty Brown
543-1234**

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.

SAMPLE 2

The Sentinel

**Smithton
Brown County Retired Teachers Association**

**September 1, 20XX
Contact: Betty Brown
543-1234**

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 2024 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:

DELEGATES	ALTERNATES
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

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.

CHECK AMOUNT \$ _____
(Payable to KRTA)

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 facilities, schools, hospitals, etc. living
- √ 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. 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. 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.

KRTA VOLUNTEER PROGRAM HOURS

FORM 21
REVISED 5/2014

Area Identifying Activity													Total Hours
	J a n .	Feb.	March	A p r i l	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	
Arts													
Church/Religious													
Civic/Municipal													
Clerical/Financial													
Community													
Companionship/Mentor													
Health/Medical													
Household Services													
Political/Government													
School/Education													
Transportation													
Youth													
Other													

44

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**

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

a. Shall serve on the Executive Council.

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:

a. First District: Ballard, Caldwell, Calloway, Carlisle, Crittenden, Fulton, Graves, Hickman, Livingston, Lyon, Paducah/McCracken, Marshall, and Trigg.

b. Second District: Christian, Owensboro/Daviess/McLean, Hancock, Henderson, Hopkins, Union and Webster.

c. Third District: Allen, Barren, Butler, Cumberland, Edmonson, Logan, Metcalfe, Monroe, Muhlenberg, Ohio, Simpson, Todd, and Warren.

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.
 - h. Central Kentucky East: Madison, Garrard, Lincoln, Jackson, Lee, Estill, Powell, Rockcastle, EKV, and Montgomery.
 - i. Eastern District: Boyd, Carter, Elliott, Rowan, Menifee, Bath, Fleming, Lewis, Mason, Greenup, and Morgan.
 - 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.
 - n. Upper Kentucky River District: Breathitt, Knott, Leslie, Letcher, Owsley, Perry, and Wolfe.

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			
DISTRICT	YEAR	DISTRICT	Year
Third	2017-18	Jefferson Co	2024-25
Middle Cumberland	2018-19	Eastern	2025-26
Second	2019-20	First	2026-27
Fifth	2020-21	Upper Cumberland	2027-28
Fourth	2021-22	Northern	2028-29
Upper KY River	2022-23	Central KY West	2029-30
Central KY East	2023-24	Big Sandy	2030-31
		Third	2031-32

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

2023-2024 KRTA OFFICERS

PRESIDENT Steve Gillespie (859) 582-1755 stkillespie@gmail.com	PRESIDENT ELECT Rick Tatum (502) 649-7613 hrtatum@bellsouth.net	VICE PRESIDENT Ann Porter (606) 584-2510 annsporter42@gmail.com	IMMEDIATE PP Golden Hale (606) 634-9075 halegolden@yahoo.com
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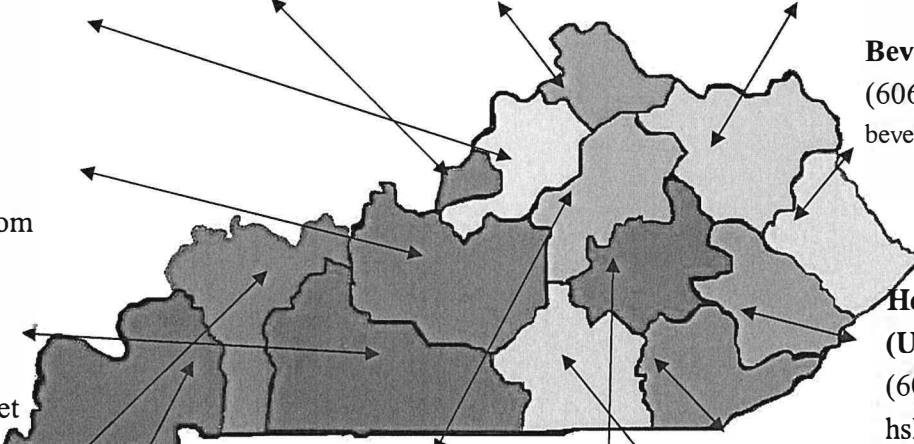
KRTA EXECUTIVE DIRECTOR

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

DEPUTY EXECUTIVE DIRECTOR

Greg Roush
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EXECUTIVE COUNCIL



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Martha Stepp (4th District)
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Arthur Green (3rd District)
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Rebecca Hudson-Brown (2nd District)
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Sandy Anderson (1st District)
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Tara Parker (Jefferson Co.)
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(Central KY East)
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Meg Judd (Upper Cumberland)
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Tishana Cundiff (Middle Cumberland)
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AARP/KRTA Specialist
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**KENTUCKY RETIRED TEACHERS ASSOCIATION
DISTRICT PRESIDENTS
2023-2024**

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EASTERN

Ann Porter
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STANDING COMMITTEES 2023-2024



LEGISLATIVE

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ALLEN SCHULER, CO-CHAIR
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LARRY WOODS, CO-CHAIR
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SECOND DISTRICT

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BIG SANDY

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EASTERN

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Hon. Lifetime Member

BOBBY L. HUMES
270-300-2927
lpathumes@gmail.com

Hon. Lifetime Member

DON HINES
502-875-4988
drhines109@gmail.com

STANDING COMMITTEES 2023-2024



MEMBERSHIP

BETTY HESTER, CO-CHAIR
502-957-2305/502-494-9114
betty.hester@krta.org

DEBBY MURRELL, CO-CHAIR
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TBD

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STANDING COMMITTEES 2023-2024

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BIG SANDY

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KRTA OFFICE MEMBERSHIP PROCEDURES

JUNE

First week of June – All cash members are mailed an invoice, 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 the county of their residence suggesting the president contact them and solicit their membership in the Local Association. (Only sent to locals that have requested)

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 KRTA 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 2023-2024!



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

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

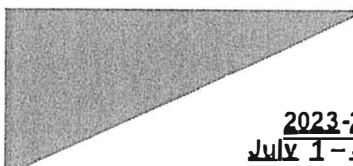
ABOVE ALL: Advocacy for retirement benefits

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!**



2023-2024
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

_____ COUNTY RTA
 _____, President
 _____, Membership Chair

REMINDER

DATE
July 1, 2023

FOR YEAR ENDING
June 30, 2024

SEND LOCAL DUES TO

NAME
(Affix label for retiree)

Quantity	Description	Amount	Total
1	One-year Local membership (Remit to Treasurer above)	\$	\$

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.

_____ COUNTY RTA
 _____, President
 _____, Membership Chair

REMINDER

DATE
July 1, 2023

FOR YEAR
ENDING June 30,
2024

SEND LOCAL DUES TO

NAME
(Affix label for retiree)

Quantity	Description	Amount	Total
1	One-year KRTA membership <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: 80%;"> 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. </div>	\$ 20.00	\$ 20.00

LEGISLATIVE UPDATE: KRTA Legislative Priorities

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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.

_____ RTA
 _____, President
 _____, Membership Chair

REMINDER

DATE
July 1, 2023

FOR YEAR ENDING
June 30, 2024

SEND LOCAL DUES TO

NAME
(Affix label for retiree)

Quantity	Description	Amount	Total
1	One-year Local membership (Remit to address above)	\$	\$
1	One-year KRTA membership	\$ 20.00	\$ 20.00

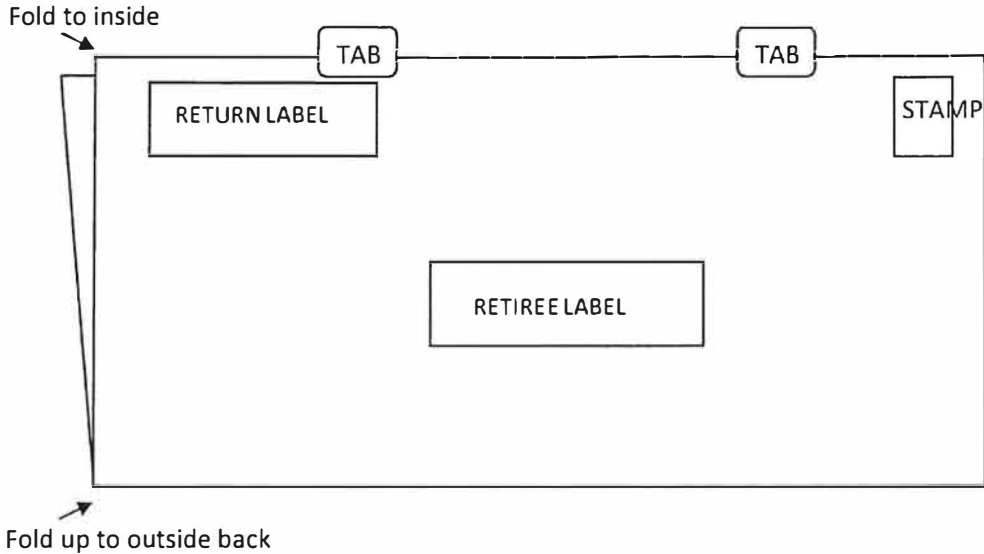
Remit to: Kentucky Retired Teachers Association
 7800 Leaders Ln.
 Louisville, KY 40291
 or
 Send the Automatic Dues Deduction (ADD) card to avoid this solicitation next year. Your \$20 dues will be deducted from your November annuity each year by TRS.

LEGISLATIVE UPDATE: KRTA Legislative Priorities

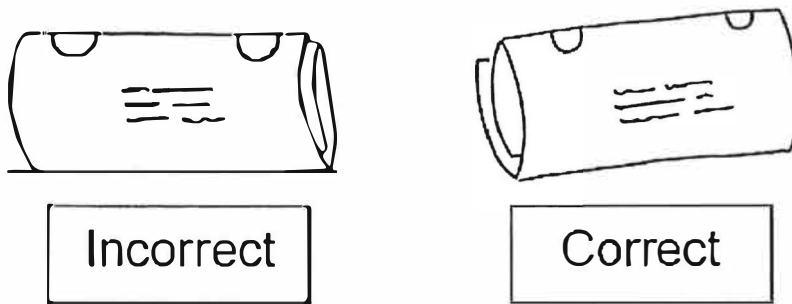
1. Restore funding to the Medical Insurance Fund as required by HB540, the 2010 Shared Responsibility Law.
2. The General Assembly must continue to fully fund TRS.
3. The General Assembly must maintain the Defined Benefit System for current and future Retired Teachers.
4. Make no changes to the Board of Trustee structure of the Teachers Retirement System of Kentucky.

Share this with your Legislators.

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).



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.



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.

