



**EXECUTIVE
COUNCIL/DISTRICT
PRESIDENT HANDBOOK
2023-2024**

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2023-2024 Tentative Events Calendar

Executive Council Meetings:

- August 21, 2023 – KRTA Office
- December 4, 2023 -KRTA Office
- April 22, 2024 – Holiday Inn East, Louisville, KY
- June 3, 2024 – KRTA Office

Health & Insurance Committee Meeting:

- October 16, 2023 – KRTA Office

Legislative Committee Meetings:

- July 17, 2023 – KRTA Office
- November 13, 2023 – KRTA Office

Membership & Pre-Retirement Committee Meeting:

- July 24, 2023 – KRTA Office

KRTA Convention:

- April 22 & 23, 2024 – Holiday Inn East, Louisville, KY

District Presidents Meetings:

- July 10, 2023 – KRTA Office
- April 22, 2024 – KRTA Convention

2023-24 Membership Campaign: Final membership report printed on MLK Day 2024

Retired Teachers Appreciation Week- October 16-22, 2023

KRTA Local and District Recognition Forms:

- March 15, 2024 – Due to KRTA Office

Volunteer Hours:

- March 15, 2024 – (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 in August

- March 15, 2024 – Report number of bags of school supplies contributed on Local Recognition Form
- March 15, 2024 – Report number of food items contributed on Local Recognition Form

Frank R Hatfield Volunteer of the Year Award:

- February 3, 2024 - Local Presidents submit candidate to District Presidents
- March 15, 2024 - District Presidents submit candidate to KRTA State Office
- April 23, 2024 - State Award Winner Announced

KRTA/AARP Grandparent Essay Contest:

- School Winner Dec 15, 2023
- County Winner Jan 31, 2024
- District Winner March 1,2024
- State Winner announced at 2024 State Convention

2023-24 KRTA NEWS – Print Dates:

- July 2023 Issue – Submission Deadline May 20, 2022
- November 2023 Issue – Submission Deadline September 20, 2022
- March 2024 Issue – Submission Deadline January 20, 2023

2023-2024 KRTA NEWS EXPRESS (Electronic Newsletter) – Release Dates:

- September 2023
- January 2024
- May 2024

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

DISTRICT ASSOCIATION

LOCAL ASSOCIATION

NAME

OFFICE

1. _____
2. _____
3. _____
4. _____
5. _____

REQUEST

_____/_____/_____
MEETING DATE

LOCAL ASSOCIATION

NAME

OFFICE

1. _____
2. _____
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5. _____

LOCAL ASSOCIATION

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5. _____

AMOUNT DUE TO DISTRICT

\$ 16.00 x _____ = _____ / _____ / _____

TOTAL ATTENDING

REIMBURSEMENT DUE

DATE

Please return reimbursement check to the following person:

_____/_____

NAME

STREET & NUMBER OR BOX & ROUTE

_____/_____/_____

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. Makes a contribution of \$50 to N.O. Kimbler Scholarship Program
20 points _____
4. Makes a contribution of \$50 to the Bourgard Foundation
20 points _____
5. Makes a contribution of \$100 or more to both the Kimbler Scholarship Fund and Bourgard Funds
10 points _____

***KRTA Office will calculate points for Membership and Growth up to 130 points**

- | | | |
|--|-----------|-------|
| 6. Achieved assigned membership percentage goals. "Yes, We Did Award" | 10 points | _____ |
| 7. Achieved greatest gain in members. "Top Hat Award" | 10 points | _____ |
| 8. Submits District Volunteer of the Year Candidate | 40 points | _____ |
| 9. A total of at least 5 officers and/or committee chairs attend the Fall Workshop. | 45 points | _____ |
| 10. 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 | _____ |
| 11. The District President attends the annual Presidents' meeting held in July and the State Convention held in April. | 45 points | _____ |
| 12. Maintains active committees and/or chairpersons in the following areas:
Health & Insurance, Legislation, Membership/Pre-Retirement: | 45 points | _____ |
| 13. 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
2023-2024**

FIRST

Sandra Rudolph
270.388-9375/270.691-1525
nanasfrudolph@gmail.com

SECOND

(Mary) Susan Weatherford
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shweatherford@bellsouth.net

THIRD

Bobbie Porter
270.256.0195/270.256.0195
mimi222@bellsouth.net

FOURTH

Patty Evans
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pgevans1@hotmail.com

FIFTH

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JEFFERSON COUNTY

Susan Thurman
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CENTRAL KY EAST

Pamela Canter
859.339.8938
butchcanter@windstream.net

CENTRAL KY WEST

Lisa Petrey-Kirk (Co-Pres) 502.680.0740/859.375.5001 lisakaypk@gmail.com	Karen Guffey (Co-Pres) 859-537-7480 karlyssa@aol.com
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MIDDLE CUMBERLAND

Tishana Cundiff
606.303.1132
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NORTHERN KENTUCKY

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UPPER CUMBERLAND

Sherry Skaggs (Co-Pres) 423.869.8496 sskaggs56@outlook.com	Paula Adams (Co-Pres) 606.248.4486/606.499.1392 paula.adams1951@yahoo.com
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UPPER KENTUCKY RIVER

Karen Griffith
606.295.9211/606.568.0113
kayseegee@yahoo.com

BIG SANDY

Thomas Salyer
606.297.4959/606.792.6833
salyertc@foothills.net

EASTERN

Ann Porter
606.584.2510
annsporter42@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, 2024, 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, 2024.

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: _____

2023-2024 KRTA OFFICERS

PRESIDENT Steve Gillespie (859) 582-1755 stkgillespie@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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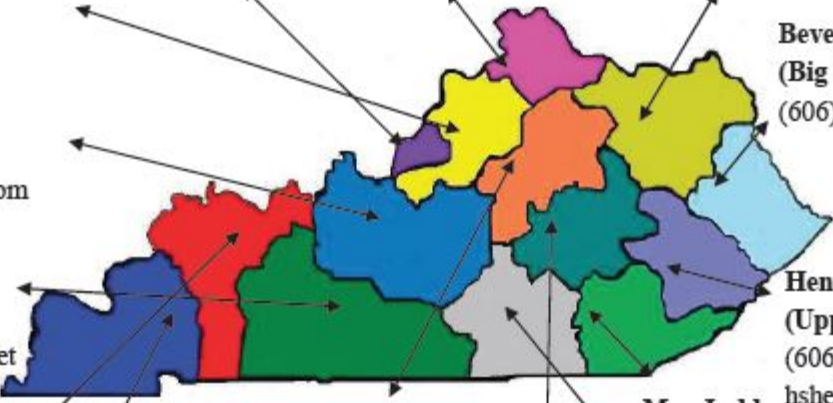
KRTA EXECUTIVE DIRECTOR

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

DEPUTY EXECUTIVE DIRECTOR

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

EXECUTIVE COUNCIL



Sue Ellen Caldwell
(5th District)
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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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beccabillbrown@att.net

Sandy Anderson
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(Central KY East)
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ftilsley55@gmail.com

Robert "Tate" Adams
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Beverly Martin
(Big Sandy)
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(Upper KY River)
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hsheffel@gmail.com

Meg Judd
(Upper Cumberland)
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meg.judd@icloud.com

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

AARP/KRTA Specialist
Cebert Gilbert, Jr.
(606) 481-5293
ccebertgilbert@icloud.com

**KRTA
EXECUTIVE COUNCIL
MEETING DATES**

2023-24

Monday	August 21, 2023	10:00 AM
Monday	December 4, 2023	10:00 AM
Monday	April 22, 2024* (Day Prior to Convention)	11:30 AM
Monday	June 3, 2024	10:00 AM

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 and will be a joint meeting with KRTA District Presidents.

FY2024 Tentative Budget.

A final budget will be approved at the August Executive Council Meeting.

The revenue is contingent upon 31,000 members, all members above 31,000 will be budget contingency. Revenue is also brought in with Sponsorships of the KRTA Convention, Fall Workshop Sponsorships, and KRTA Convention Registration. The budget as presented has \$24,000 less revenue than the previous year. This loss of revenue stems from less paid convention registration from the previous year. Registration was up from the previous year however we do not charge registration for Officers, Past Presidents, District Presidents, and State Committee members and more of those folks attended the KRTA Convention this year. KRTA was also informed in early May the Liberty Mutual Insurance would no longer be contributing \$23,000 as sponsor of the KRTA Convention.

Cuts for 2024

Strategic Advisors	\$20,000
Cleaning Contract	\$2926
Membership Recruitment	\$1,500
Health and Insurance Committee	\$1,000
Membership Committee \$	\$1,000
Other Committee	\$1,000
Printing	\$2,000
Equipment, Furniture, Software	\$2,000
Scholarship	\$8,300
Eliminate Technology Assistant Position	\$4,000
New Retiree Recognition	\$2,304

Budget Increases

Staff Pay Increases	\$2,086
Staff Travel	\$1,333
KRTA Newsletters	\$4,444
Legislative Committee	\$1,519
Fall Workshop	\$2,965
District President Travel	\$1,400
Executive Council Travel	\$3,272
KRTA Convention Increase	\$651

Account		FY 2023 Budget	Actuals Thru 5/11/2023	FY 2024 Budget	\$ Change	% Change
Revenue						
001	MEMBERSHIP DUES	\$ 620,000	\$ 625,950	\$ 620,000	\$ -	0.00%
002	INTEREST					
2001	Checking Account Interest	-	-	-	-	-
2002	Investment Interest	-	-	-	-	-
3025	Dividend Income	-	-	-	-	-
	Other	-	-	-	-	-
002	TOTAL INTEREST	-	-	-	-	-
003	ANNUAL CONVENTION					
3001	Door Prizes	-	-	-	-	-
3002	Convention Registration	12,000	8,987	9,000	(3,000)	-25.00%
3003	Convention Sponsors	7,500	9,270	8,500	(1,000)	-13.33%
003	TOTAL ANNUAL CONVENTION	19,500	18,257	15,500	(4,000)	-20.51%
004	OTHER					
4001	KRTA Pins	200	175	200	-	0.00%
4002	KRTA Mugs	-	-	-	-	0.00%
4003	Rebates	20,000	20,000	-	(20,000)	-100.00%
4004	Mailing Supplies	-	-	-	-	-
4005	Over Payments/Refunds	0	-	-	-	0.00%
4007	Telephone Rebate	1,500	1,438	1,500	-	0.00%
4009	Miscellaneous	-	\$ 1,000	-	-	0.00%
4010	Grant Income	-	2,500	-	-	-
4011	Fall Workshop Sponsors	5,000	5,000	5,000	-	0.00%
004	TOTAL OTHER	26,700.00	30,112	6,700.00	1,700	-74.91%
	TOTAL REVENUE	\$ 666,200	\$ 674,320	\$ 642,200	\$ (24,000)	-3.60%
Expenditures						
100	ANNUAL CONVENTION					
0101	Luncheon	11,420	11,521	11,550	130	0.00%
0102	Sound and Audio Production	3,329	3,850	3,850	521	15.65%
0103	Opening Dinner	13,417	13,063	13,417	-	0.00%
0110	Miscellaneous	8,546	8,494	8,546	-	0.00%
100	TOTAL ANNUAL CONVENTION	36,712	36,927	37,363	651	1.77%
200	CONTRACT SERVICES & FEES					
0201	Audits	20,920	19,958	20,920	-	0.00%
0202	Bonds	102	102	102	-	0.00%
0203	Insurance	6,330	5,805	6,330	-	0.00%
204-1	KRTA News	47,859	55,792	52,303	4,444	9.29%
204-2	Marketing	64,160	60,607	44,160	(20,000)	-31.17%
0205	Maintenance Agreements	23,000	21,935	23,000	-	0.00%
0206	Legal/line	20,000	16,670	20,000	-	-13.04%
0207	Membership Recruitment	19,500	15,398	17,000	(2,500)	-15.00%
0208	Phone Payments	-	488	500	-	-
200	TOTAL CONTRACT SERVICE & FEES	201,871	196,680	184,315	(17,556)	-8.70%
300	COMMITTEES					
0301	Legislative	36,000	33,375	38,519	2,519	7.00%
0302	Health & Insurance	7,500	6,318	6,500	(1,000)	-13.33%
0303	Membership & Pre-Retirement	7,500	3,914	6,500	(1,000)	-13.33%
0304	Other	2,000	693	1,000	(1,000)	-50.00%
300	TOTAL COMMITTEES	53,000	44,327	52,519	(481)	-0.91%
400	OFFICE EXPENSE					
0401	Printing	4,000	1,044	2,000	(2,000)	-50.00%
0402	Postage	6,000	5,195	6,000	-	0.00%
0403	Equipment, Furniture & Software	4,000	858	2,000	(2,000)	-50.00%
0404	Materials & Supplies	4,000	2,752	4,000	-	0.00%
0405	Telephone	5,800	4,414	5,800	-	0.00%

0406	Maintenance & Repairs	8,571	9,465	5,580	(2,991)	-34.90%
0407	Property Taxes & Licenses	5,000	4,566	5,000	-	0.00%
0408	Sales & Use Tax	25	14	25	-	0.00%
0409	Utilities	5,000	4,125	5,000	-	0.00%
0410	Miscellaneous	3,612	2,823	3,000	(612)	-16.94%
400	TOTAL OFFICE EXPENSE	46,008	35,258	38,405	(7,603)	-16.53%
500	DISTRICT EXPENSE					
0501	Appropriation	7,000	7,000	7,000	-	0.00%
0502	Fall Workshop - Food	13,327	14,642	14,000	673	5.05%
0503	Fall Workshop - Travel	19,708	22,486	22,000	2,292	11.63%
0504	Leadership Meetings	14,585	13,707	14,585	-	0.00%
0505	District Presidents Travel	5,500	6,902	6,900	1,400	25.45%
0506	New Retiree Recognition	6,304	3,371	4,000	(2,304)	-36.55%
500	TOTAL DISTRICT EXPENSE	68,434	68,109	68,495	2,061	3.10%
600	OFFICERS & EXECUTIVE COUNCIL					
0601	Officer Travel	5,167	3,667	5,167	-	0.00%
0602	Executive Council Travel	5,928	9,223	9,200	3,272	55.20%
	TOTAL OFFICERS & EXECUTIVE COUNCIL	11,095	12,890	14,367	3,272	29.49%
700	STAFF					
0701	Executive Salaries	135,502	119,867	138,277	2,775	2.05%
0702	Secretaries Salaries	60,225	53,213	57,750	(2,475)	-4.11%
0703	Fringe Benefits	0	-	-	-	0.00%
0704	Payroll Taxes	14,973	13,241	14,996	23	0.15%
0705	Staff Travel	6,767	9,041	8,100	1,333	19.70%
0706	Unemployment Insurance	1,800	368	1,800	-	0.00%
0707	401k Accounts	19,173	18,427	19,603	430	2.24%
0708	Medical Reimbursement Accounts	2,000	2,612	2,000	-	0.00%
0709	Payroll Expenses	410	238	410	-	0.00%
700	TOTAL STAFF	240,850	215,017	242,936	2,086	0.87%
800	TRANSFERS & REFUNDS					
0802	Refunds		37	-	-	0.00%
0803	Donations	200	50	200	-	0.00%
0804	Scholarships	8,300	8,300	-	(8,300)	-100.00%
800	TOTAL TRANSFERS & REFUNDS	8,500	8,387	200	(8,300)	-97.65%
815	DEPRECIATION EXPENSE					
		-	-	-	-	0.00%
900	GRANTS TO LOCALS					
		\$ 3,600	3,200	3,600	-	0.00%
Total Expenditures		\$ 668,070	\$ 620,738	\$ 642,200	\$ (25,870)	### ###
General Fund Revenue less Dividend Income		\$ 668,200	\$ 674,328	\$ 642,200	\$ (24,000)	6.28%
General Fund Expenditures		668,070		\$ 642,200	\$ (25,870)	-3.87%
Net Ordinary Income		0		\$ -		

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 502-388-2555
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 1822 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 McBumey 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 42158	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 Greens 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 41184	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.



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

- 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, EKU, 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 Legislative Committee

MARSHALL WARD, CO-CHAIR
270-293-9081
josephmarshallward@gmail.com

ALLEN SCHULER, CO-CHAIR
502-239-1559
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LARRY WOODS, CO-CHAIR
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THIRD DISTRICT
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FOURTH DISTRICT
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FIFTH DISTRICT
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CENTRAL KY EAST
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BIG SANDY
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EASTERN
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robert.adams8181@gmail.com

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

Hon. Lifetime Member
DON HINES
502-875-4988
drhines109@gmail.com



2024 KRTA Legislative Priorities

I. Fully fund the Teachers' Retirement System (TRS) in accordance with the state's pension-contribution statute (KRS 161.500)

We thank the Kentucky General Assembly for fully funding TRS since 2016. We urge the General Assembly to continue this fiscally responsible practice moving forward. By fulfilling the state's actuarially required contributions, TRS solvency will continue to improve until the system eventually becomes 100 percent funded.

It is investment income, not tax dollars, that pays for the vast majority of TRS's pension benefits. Opting to forego the Commonwealth's financial obligation to the pension system, while saving the state money in the short-term, will in the long run, cost Kentucky's taxpayers double any saved amount over a 10-year period due to the loss of investment income.

II. Maintain the defined benefit system currently in place for Kentucky's retired, current, and future teachers

Since teachers are ineligible for Social Security benefits, payouts from TRS are the only income Kentucky retired teachers receive.

Defined benefit (DB) retirement plans are 40 percent less expensive and more efficient than 401(k)-style defined contribution plans. DB plans are the most effective and efficient way to ensure a dignified retirement for teachers as well as the best way to attract and retain new educators for the state's public-school systems.

III. Fully fund the statutorily required obligation to the TRS Medical Insurance Fund as required by HB 540, the 2010 Shared Responsibility Law (KRS 161.550 and 161.420)

In 2010, Kentucky's education community came together with elected officials and crafted a plan to ease the healthcare liabilities on Kentucky's taxpayers and to ensure affordable healthcare access for active and retired teachers.

Since its founding, the Shared Responsibility Law has saved taxpayers hundreds of millions of dollars while providing good medical benefits to Kentucky's retired teachers. We thank our legislators for fully funding the state's obligations and ask them to stay on this fiscally responsible course in the future.

IV. Maintain the current TRS board structure

TRS members directly elect the majority of its board members, a process which ensures accountability. The legislative and executive branches of government oversee TRS and the state's other pension systems through the agency of the Public Pension Oversight Board (PPOB). Changing the member elected TRS board structure could result in the loss of TRS independence, thus exposing TRS to some of the same issues that have plagued Kentucky's other retirement systems over the years.

V. Oppose any legislation that would result in higher prescription costs for Kentucky's retired teachers.

Kentucky's retired teachers live on a fixed income, one that averages less than \$40,000 in benefit payouts annually. With inflation hovering between 8-to-10 percent, legislative efforts resulting in higher prescription costs could result in thousands of retired teachers becoming economically vulnerable.

2023-2024 Membership Committee

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

DEBBY MURRELL, CO-CHAIR
502-458-5125/502-387-7472
dasailboat@msn.com

FIRST DISTRICT

ANITA THOMAS
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SECOND DISTRICT

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THIRD DISTRICT

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FOURTH DISTRICT

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CENTRAL KY EAST

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EASTERN

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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 MEMBERSHIP ENHANCEMENTS


7800 Leaders Lane Louisville, KY 40291

(502) 231-5802 or 1-800-551-7979

info@krta.org www.krta.org

STAFF

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

 @KentuckyRetiredTeachersAssociation

 @kyretiredteach

- **KRTA State Units:** 118 Local Associations & 14 District Associations
- **Membership:** Strong & unified voice in Frankfort with 31,000+ members strong
- **KRTA NEWS:** Three printed newspapers and three electronic issues per year
- **Bourgard Foundation:** Benevolence Fund for members
- **N.O. Kimbler Memorial Scholarship Fund:** Provides 16 scholarships to KY Community Colleges
- **KRTA Annual Convention & 14 District Fall Workshops**
- **Legal Services: Rebecca Park** 1-800-232-1090 Hours: 8:00-12:00 & 1:00-4:00
 - Free limited legal advice
 - 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
 - Savings, Free Checking, Individual Retirement Accounts
 - Mortgages, Home Equity, Vehicle Loans / Home Equity Credit Cards
 - Special attention to 55+
 - Some restrictions do apply
- **AAA** Jennifer Hester (502) 655-2827 or hester.jennifer@aaaec.com
 - KRTA members receive a first time \$42 AAA membership
- **North American Life Plans** Jeff Johnson (502) 553-7630 or 1-888-362-1214 jjcraa@aol.com
 - Long-Term Care & Life Insurance
 - Identity Theft (Life Lock) Billing 1-866-815-2007
- **Stephen Foster Story:** Enjoy BOGO please call 1-800-626-1563
- **Kentucky State Parks:** Commonwealth Connection visit <https://parks.ky.gov/deals/state-employees>
- **Avesis Vision Plan:** Enrollment 1-800-466-5182 Provider Questions Avesis 1-800-828-9341
 - Enrollment Period: Jan-March
 - High and Low Option - Single Plan, Two Person, and Family
 - Brokered by Jason Weilage (502) 500-9623 jweilage@jswagency.com

- **Delta Dental Plans/VSP Vision Plan:** 1-800-955-2030 or www.deltadentalky.com/krta
 - Enroll anytime with three plans available: PPO, PPO Plus, and Delta Care
 - Single Plan, Two Person, and Family
 - Brokered by Jason Weilage (502) 500-9623 jweilage@jswagency.com
 - Billed by Morgan White 1-888-859-3795
- **HeuserHearing institute:** (502) 584-3573 or www.thehearinginstitute.org
 - No charge consultation
 - Members discounts
- **Comfort Keepers:** 1-866-213-5344 or www.comfortkeepers.com
 - Preferred member rates
 - Free in-home consultation
 - Meal preparation, errand services, respite & relief for families, personal care services
- **Home Instead Senior Care:** 1-866-886-6831 or www.homeinstead.com/
 - Nine offices in Kentucky serving 53 counties
 - Preferred rate for services
 - Free in-home assessment
 - Meal preparation, errand services, respite & relief for families, personal care services
- **Home Helpers:** 1-800-990-9750 or www.homehelpershomecare.com/
 - Free in-home consultation
 - Senior Care - Long-term Care Recuperative Care
 - Automated Medication Dispenser

Teacher Retirement System of KY (TRS)
www.trs.ky.gov or 1-800-618-1687

<u>TRS (MEHP) 65 and over or Medicare Eligible</u>	www.trs.ky.gov/retired-members/age-65-over/
United Healthcare Group Advantage (PPO) 1-844-518-5877	www.retiree.uhc.com/trs
Express Scripts, Medicare Part D 1-877-866-5834	www.express-scripts.com/
KYRx Coalition 1-855-218-5979	www.kyrx.org
Corielle DNA Testing 1-888-454-9024	www.coriell.com/trs
Renew Active 1-844-518-5877	www.UHCRenewActive.com
Renew Rewards 1-888-219-4602	www.uhc.com/member-resources
Virtual Doctor 1-855-615-8335	www.uhcvirtualvisits.com/
United Healthcare Hearing 1-866-445-2071	www.UHCHearing.com/Retiree
Personal Emergency Device 1-855-595-8485	www.lifeline.com/uhcgroup/
Moms Meals 1-866-204-6111	

<u>TRS (KEHP) 65 and under NOT Medicare Eligible</u>	www.trs.ky.gov/retired-members/under-age-65/
Medical Anthem BCBS 1-844-402-KEHP	www.anthem.com
Prescription CVS Caremark 1-866-601-6934	www.caremark.com/
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.webmdhealth.com/kehp/
Turning 65 Soon? 1-800-618-1687	www.trs.ky.gov/retired-members/turning-65/
24/7 Nurse Line 1-877-636-3720	

2023-2024
Health and Insurance Committee

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EASTERN
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msnedegar@windstream.net

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**

Medicare: 800-MEDICARE
800-633-4227

Social Security: 800-772-1213

TRS Website: www.trs.ky.gov
Below are the specific URLs for 2021 for both the UHC and ESI Summary of Benefits.

<https://trs.ky.gov/wp-content/uploads/2020/10/2021-UHC-Summary-FINAL.pdf>

<https://trs.ky.gov/wp-content/uploads/2020/10/2021-RX-Flyer-FINAL.pdf>

Don't Let Your MEHP Terminate Due to Medicare Part B Non-Payment or Multiple Coverages

- Sign up for Medicare Easy Pay 800-633-4227.
- Do not enroll in Medicare Advantage and Part D Drug Plans outside of TRS.

SILVER SNEAKERS
888-423-4632 for MEHP
Free enrollment at participating fitness centers at
www.silversneakers.com

Kentucky Employees' Health Plan (KEHP)

Under age 65 and not Medicare eligible

- 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.livehealthonline.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.smartshopper.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