

## **KRTA History 1995-2002**

*The history of KRTA from 1995-2002 was written by Dr. Frank Hatfield, KRTA Executive Director 1987-2002.*

### **1995-2002**

In 1996, M. L. Archer, with the help of Marvin Dodson, Ted Crosthwait and the KRTA staff, wrote a brief history of KRTA from 1956 to 1995. I have been asked to continue the history from 1995 to 2002. As Mr. Archer did, I will try to trace the progress of KRTA by highlighting the people and events that have contributed toward KRTA's continued growth and influence.

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

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

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

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

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

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

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

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

Virginia Shaw was appointed chairperson of the Membership and Pre-Retirement Committee following the resignation of M. L. Archer. Mr. Archer had served as committee chairman for 12 years. Upon his retirement from this position, he was elected an honorary life member of the Committee. In recognition

of his contribution to the association the M. L. Archer Award was established. This award is given to local associations with membership of at least 90 percent of those eligible.

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

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

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

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

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

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

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

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

1. Marvin Dodson was named Executive Director Emeritus in recognition of his service as the first Executive Director of KRTA and his continuing service to the organization after his retirement.
2. Robert Kelley retired as chairman of the Health & Insurance Committee, after which he was named an Honorary Life Member of the Committee.
3. The Council approved the employment of a Deputy Executive Director.

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

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

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

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

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

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

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

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

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

KRTA welcomed the addition of a state AARP office in Louisville and immediately began working with the personnel in that office on issues of common interest. In an effort to call attention to the special contributions made by grandparents in children's lives, the two organizations initiated a Grandparent Essay Contest. The contest is open to fifth graders who are asked to write an essay on why their grandparent should be selected Kentucky's Grandparent.

Recognizing the continuing threat of mandatory Social Security, the association joined the Coalition to Preserve Retirement Security. CPRS is made up of retirement systems and retiree associations across the nation that do not participate in Social Security.

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

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

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

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

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

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

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

The Association, since its beginning, has worked closely with the Kentucky Teacher's Retirement System. The presentation of a united program from both the retirement system and the Association has been a key factor in the successes experienced with the Kentucky General Assembly. A review of Appendix I

showing the cost-of-living adjustments and the increases in the value of service credit validates this success.

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

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

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

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

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

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

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

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