

KRTA History 2002-2023

Thanks to all who worked on the project of updating the KRTA History. Writers were; Patsy Young, KRTA Past President, Debby Murrell, long-time chair of the Membership Committ, and Bill Kelley, KRTA Past President. Wanda Mollett helped collate and compile the vaious parts. Experience and expertise provided by Bobby Humes and Ray Rountree, both KRTA Part Presidents and former Legislative Committee Co-Chairs.

2002-2009

The year 2002 was a year of change for the Kentucky Retired Teachers Association and retired teachers. Frank Hatfield, long time Executive Director of KRTA, retired in July. Dr. Robert (Bob) Wagoner, the new Executive Director, came on board in January 2002. Ernie Trosper, from Central Kentucky West District, was President of KRTA in 2001-2002. When Mr. Hatfield became Executive Director, there were 10,400 KRTA members. In 2002 when he retired there were 21,380 members! In addition, 24 KRTA locals had 90+% membership.

The KRTA convention in April of 2002 also saw the first Grandparent Essay Contest winner. The KRTA Scholarship was increased from \$400 to \$1000. The other major transition for both active and retired teachers was that long time Executive Director of the Kentucky Teachers Retirement System, Pat Miller, retired and was replaced by Gary Harbin.

There was an ad hoc COLA of 1.4% for retired teachers that was granted by the General Assembly that was in addition to the guaranteed 1.5% COLAs retirees receive each year. On July 1, 2002, Roberta Fugate, McDowell, KY, of the Big Sandy District became the new KRTA state president focusing on a "Call for Service" to support retired teachers. Bob Estes replaced Frances Miller as the KRTA/AARP liaison.

In 2003 Dr. Wagoner continued his articles about Social Security, specifically the GPO and WEP requirements for people such as Kentucky teachers who are not under Social Security. As a result of the WEP, teachers who have earned Social Security in addition to their teacher retirement lose 60% of what they should have received from Social Security. Another reason for the articles is that there was continuing discussion of placing Kentucky teachers under Social Security. Fortunately, this has never occurred.

KRTA memberships as of January 2003 was 22, 437 of a potential membership of 31,907, with 27 KRTA locals having 90+% membership. Mail order prescriptions were offered to retirees under 65 for the first time. For MEHP members the maximum out of pocket expenditure was \$1,200 (The same as of 2023!). There was an ad hoc COLA provided by the General Assembly of 1.5% in addition to the guaranteed 1.5% COLA. Larry Morrow, Somerset, KY, of the Middle Cumberland District became the new state KRTA president

on July 1, 2003. He challenged KRTA members to find, mentor, and encourage a new generation of KRTA members. Another effort in 2003 for KRTA was the drive to encourage the Department of Insurance to rescind the 30% increase of premiums for the Long-Term Insurance Company.

In 2004, 135 schools in 58 counties participated in the Grandparent Essay Contest. The Kentucky Teachers' Retirement System recommended to the General Assembly adjustments to the medical insurance fund to keep the fund solvent. In January 2004 KRTA membership was 23,189, 752 members over the same time in 2003. Potential membership was 32,893. 32 KRTA Locals had 90+% of membership, with eight at 100%. There was an ad hoc COLA of .8% in July of 2004 in addition to the guaranteed 1.5%.

The Medicare cost for MEHP retirees increased from \$58.70 to \$66.60 per month. Irene Erskine, of Bowling Green, Third District, became KRTA President, on July 1. Irene focused on "Informing, Inspiring, and Challenging" others to join and support KRTA. In a Special Session of the General Assembly HB 434 was passed that provided that the governor and General Assembly must provide funding for insurance for retired teachers (unless suspended by the General Assembly) for retirees under 65. A short-term fix of \$182 million was provided for 2005.

In 2005 HB 434 created a "Medical Insurance Stabilization Contribution", but Governor Fletcher and the General Assembly did not fund it. The 2005 state KRTA convention was again held at the Executive West Hotel. KRTA membership was 24,271 members, 71.4% of potential members of 34,000. Middle Cumberland District had a 92.8% membership rate. There was an ad hoc COLA of .7% in addition to the mandated 1.5% COLA.

Neil Tucker, Morganfield, KY, of the Second District, became president of KRTA on July 1, 2005. He focused on "Positioning KRTA for Results Through Caring and Sharing". On June 30, 2005, Betty Hester stepped down as Deputy Executive Director to part-time and Brenda Meredith was hired part-time at KRTA as Communications Deputy Executive Director.

Janie Caslowe was named the Executive Deputy Director for Member Services. Ernie Trosper and Bob Anderson joined Virginia Shaw and Harold Van Hook on the state membership committee. The N.O. Kimber Scholarships increased from \$1,000 to \$1,100. Our vendor partners continued to provide articles for the KRTA Bulletin each issue giving updates and information in their areas.

In 2006 pension issues continued to be discussed nationally. Dr. Wagoner wrote articles for the KRTA Bulletin identifying some of these issues, such as companies not providing the needed funding and moving to hybrid plans instead of defined pensions. The state budget provided full medical insurance funding of \$115 million for 2007 and \$154 million for 2008. It also approved an ad hoc COLA of 2.1% for retired teachers.

State KRTA membership was 25,207, a 71.9% rate with 35,069 potential members. 37 KRTA locals had 90+% membership. According to Gary Harbin 4,559 retirees were between 80-100 years old. 39 retirees were over 100. Ray Roundtree and Bobby Humes continued as chairs of the Legislative Committee and Irene Erskin and Carolyn Fain were chairs of the Health and Insurance Committee. Ernie Trosper, Bob Anderson, Virginia Shaw, and Harold Van Hook continued as Membership chairs.

Tara Parker, Frankfort, KY, of the Fifth District, became state KRTA president in July 2006. Tara emphasized "Finding and Keeping the Gold with KRTA" to guard the future for retired teachers. KRTA began publishing the names of deceased retired teachers in the KRTA Bulletin this year.

Concern about mandatory Social Security for teachers was still evident in 2007, as were other retirement issues. The KRTA state convention was held at the Executive West Hotel again in April. On January 19, 2007, state KRTA membership stood at 25,847, a rate of 71.8%, with a potential membership of 35,995. 39 KRTA locals had 90+% of membership. The General Assembly mandated that funds from the employer pension match be used for the retiree insurance fund. The three key issues for retirees and KRTA moving forward at this time were mandatory Social Security, health insurance funding, and pension reform.

Frank Hatfield and Gary Harbin were named to Governor Fletcher's Blue Ribbon Committee studying pension reform in Kentucky. State committees continued with the chairs, except Betty Hester and Debby Murrell became state chairs with Ernie Trosper and Harold Van Hook of the Membership Committee.

The Executive Council looked at raising the dues for KRTA from \$15 to \$20. The last increase in dues was in 1987. In the Legal Line in the KRTA Bulletin there was an article concerning increasing frauds, both by phone and online for retirees. Patsy Young, Elizabethtown, KY, of the Fourth District, became state KRTA president in July 2007. Patsy challenged us to "Color KRTA Active" to improve the welfare of retired teachers.

The Coalition to Preserve Retirement Security (CPRS), a national committee of which KRTA was a part, was formed in 2008 to help preserve retirement benefits. In addition to moving to a defined contribution plan for retirements the committee also addressed mandated Social Security, and repeal of the Social Security provisions WEP and GPO, which affects Kentucky's retired teachers. 2008 saw the 50th anniversary celebration of KRTA. Bob Estes, long time AARP/KRTA liaison, retired and Neil Tucker became the new AARP/KRTA liaison.

KRTA membership stood at 25,960 on January 18, 2008, a 72.5% membership rate. There were 35,792 potential members. Thirty-two KRTA locals had over 90% membership with 9 locals at 100%. Only six other state Retired Teacher Associations had

more retired teacher members than KRTA. The Delegate Assembly at the KRTA state convention approved dues increase from \$15 a year to \$20 a year. The General Assembly again directed employer matching pension funds to be redirected to the insurance fund, now \$500 million over three bienniums. The District Presidents' meeting at the state convention was chaired by the Vice President of KRTA. In the Legislative Session, there was no ad hoc COLA approved for retired teachers, but the Pension Reform Bill which could have negatively impacted teachers' retirement did not pass.

Billy Triplett, Garner, KY, of the Upper Kentucky River District, became the KRTA president in July. His emphasis for the year was to "Maximize the Power of Numbers and Letters" to benefit retired and active teachers. There was a Special Legislative Session to address the pension reform. In that Special Session, the only major change to the Kentucky Retired Teachers System was a change in value of service years for those hired after July 1, 2008. By 2009-10 \$894 million had been borrowed from the pension fund to pay for health insurance to be paid back with 7% interest.

KRTA continued to be a member of the Coalition to Preserve Retirement Security (CPRS) to protect Kentucky retired teachers in 2009. The KRTA state convention was held at the Crown Plaza Hotel, formerly the Executive West Hotel in Louisville. At the convention attendees paid \$20 for the luncheon on Tuesday, an increase from \$15.

On January 16th, 2009, state KRTA membership was 26,522 of 37,053 potential members, a rate of 71.6%. Thirty-eight KRTA locals had 90%+ membership. The locals were named in the KRTA Bulletin. Gary Harbin reported at the convention that the KTRS investments were holding up despite the severe economic downturn nationally.

The N.O. Kimber Scholarship was increased to \$1,200 from \$1,100. The Vice President of KRTA conducted the District Presidents Meeting. Minutes of both the District Presidents Meeting and the Executive Council were published in the KRTA Bulletin. The 2010 Legislative session was \$1 billion short of needed funding for the next two years. Health care became a national issue for retired teachers as well as in Kentucky. In 2009-10 Patsy Young and Carolyn Falin became chairs for the State Health Committee of KRTA. Ceibert Gilbert, Stanton, KY, of the Kentucky East District, became KRTA president in July 2009. Ceibert emphasized "United We Win" for his theme this year.

2009-2016

During the 2009-10 year the Grandparent Essay in cooperation with AARP continued to gain popularity. Dr. Wagoner gave praise to the exceptional work the KRTA staff gives to members. Brenda Meredith, Carla Hahn and Janie Caslowe are truly appreciated. The annual convention remained a popular social, informative, and business gathering. The

Master's Men Choir directed by Melanie Wood was a highlight. The reception committee from the Jefferson County hosts handled hospitality and distribution of almost 200 door prizes with ease.

The N.O. Kimbler scholarships to the 16 public, community and technical colleges were given in the amount of \$1200.00 each. On January 22, 2010, KRTA membership stood at 27,128, 71.4% of the 37,977 potential members.

Health and insurance remained a major concern as the KTRS was being forced to borrow from pension funds to pay for it. Another insurance concern became evident as the KY Office of Insurance permitted huge rate increases by LTC carriers for KRTA members with long term care insurance.

Dr. Wagner continued his encouragement to members, urging more involvement, and as always, concern for maintaining the defined benefit plan and keeping the integrity of the retirement plan as some detractors questioned the actuarial soundness of management. Melanie Wood from Jefferson County became the president for 2010-11, with a theme of "Celebrate Retirement!".

The most notable happening in 2010-11 was HB 540 – also known as the Shared Responsibility Act. After years of insurance for retirees being in jeopardy, educators agreed that a new method must be found to fund this benefit. KTRS, KRTA, active teachers, school boards, school superintendents and the state worked together to craft a plan that solved the problem. (See more details in March 2020 KRTA News which elaborates on the 10th anniversary of the bill) Dr. Wagoner was responsible for hosting the first meeting of the group.

Membership in 2010-11 was 27,000. KRTA began making plans to relocate as a business development was underway. The office will remain near to its present location. News of scholarships, school supply donations and backpack programs were reported from throughout the state as more and more locals participated. Charlotte Lindley came to work in the office for KRTA in 2010.

In July, Edwin S. Cook III became president for 2011-12, with a theme of "Volunteers—KRTA's Foundation". He is from the Eastern District. Don Pace and Carolyn Falin were the Health and Insurance co-chairs. Debby Murrell and Betty Hester were the Membership so-chairs. Bobby Humes and Ray Roundtree were the Legislative Committee co-chairs.

As 2011-12 began, Dr. Wagoner continued to keep members informed about WEP Social Security issues through columns in the newsletter. The state conference moved from the Crowne Plaza to Holiday Inn Hurstbourne. Outstanding guest speakers and valuable information from business sponsors continued to make the conference a positive experience. During many of the conferences Gary Harbin, Executive Secretary of KTRS, was an always welcomed participant.

Candidates for the governor's office answered questions developed by the legislative committee headed by co-chairs Ray Roundtree and Bobby Humes. Their responses were published for members to peruse. (See September 2011 KRTA News)

Membership on January 20 was over 28,000. Eastern Ky University became affiliated with KRTA and now is a part of Central KY East District. A very positive relationship with KTRS continued with joint sessions of pre-retirement seminars. Dr. Jim Frank from the First District became president in July 2012. He emphasized "Leadership and Mentorship".

The refrain heard more often in 2012-13 when asked why join KRTA, was a loud and clear "KRTA is the only organization in the state whose sole purpose is to improve the welfare of Kentucky's retired educators". Once more, KRTA and KTRS found themselves defending the Defined Benefit vs Defined Contribution argument and the governance of the retirement system. The retirement system began letting everyone know that public pensions are mostly unnoticed until someone discovers the important contribution made to the local and state economies. During this time, Bobby Humes stepped down as Co-Legislative chairman and was named Legislative Chair Emeritus. Don Hines became the new co-chair of the legislative committee. KRTA membership on January 23, 2013, was 29,029 of 41,098 potential members for a 70.7% rate.

President Frank praised leaders from all levels – local, district and state and commented on their effectiveness. Business partners continued to contribute articles for the Newsletter and were always willing to help with health, legal, investment, security and other questions and made themselves available for district and local meetings. Carolyn Falin from Upper Cumberland became president in July for 2013-14.

The 2013 year began with emphasis on membership in a front-page story in the KRTA News. Competitions and awards were explained, and districts and locals were urged to shoot for the goal of 29,514. Membership Co-Chairs Betty Hester, Debby Murrell, and Ernie Trosper traveled the state with "white cards" urging automatic renewal each November. Dr. Wagoner chimed in by encouraging members to "brainstorm" for new ideas in member recruitment. Emily Carey began work for KRTA as the Social Media Specialist in 2013.

President Falin's "Vital Links" focused on "Communication and Individual Responsibility" which are critical to the growth of KRTA. She pointed out that the foundation of KRTA was established on a strong governance structure providing for communications within the organization. She challenged members to take the mantle of leadership "outside" and communicate with active teachers, business and civic leaders, and local and state government leaders.

On October 20, 2014, Governor Steve Beshear signed HJR 19 which honors retirees by declaring the third week in October Retired Teachers' Appreciation Week. Faye Shehan

was elected president for 2014-15. Faye represented Northern Kentucky. Her theme was "Prepare for the Future".

Since November 14, 2014, was a general election, members were caught up in the process and priorities of pensions, COLA's, health insurance, etc. Keeping in mind that KRTA is not a partisan group, members contacted and quizzed state representative candidates and state senator candidates to determine their views on KRTA concerns. Solving the unfunded liability problems with KRTS, keeping the KTRS a defined benefit group retirement plan and making no changes in the governance structure were on the radar. 29,550 members were kept informed and went to the polls to vote, wrote letters, and made phone calls. Patsy Rainey from Central Kentucky West, emphasizing that KRTA was a "Radiant Diamond" was elected president for 2015-16.

United Health Care was awarded the KTRS MEHP Medicare Advantage contract for 2015. Members were kept informed about insurance changes, including "turning 65". In December 2015 the KRTA Executive Council took the first step in establishing the Kimbler-Bourgard Foundation, the Kimber portion was for scholarships and the Bourgard portion was for retired teacher benevolences. Membership reached 30,880. "Why I Am a Member of KRTA" remained a popular feature in the KRTA News Bulletin as did the regular column on Social Security News and Pension Watch.

Dr. Wagoner emphasized the strength of the volunteer retired teachers, noting that the Ark was built by volunteers and the Titanic by professionals. Long-time AARP/KRTA liaison Neil Tucker stepped back from this position and was replaced by state KRTA Past President Cebert Gilbert. Margaret Sims became a co-chair for the Health and Insurance Committee, with a vacancy for the other co-chair. Cathy Gullett was elected KRTA president for 2016-17. Cathy was from the Big Sandy District. In the 2016 Legislative Session, the state budget provided nearly the full Actuarially Required Contribution (A.R.C.) to Kentucky Teacher's Retirement System for the first time in a decade.

Members were saddened by the news of Frank Hatfield's death on November 15, 2015.

2016-2023

When the 2016 KRTA year began July 1, the newly installed state officers stepped forward. Under the leadership of President Cathy Gullett, (Big Sandy District) new horizons, fresh energy, leadership growth and development, as well as fresh vision rose throughout the organization. With fellow officers, Romanza Johnson, President Elect (Third District), Shirley Dick Wolf, Vice President (Middle Cumberland District), and Patsy Rainey, past President, (Central Kentucky West), KRTA continued to meet fresh challenges and to grow its membership. The 60 years celebration was highlighted by the General Assembly's passing a budget deal to fund Teacher pensions.

Fresh changes came along, beginning with the addition of three electronic, as well as three printed issues of the "KRTA News". This communications improvement would keep members better informed regarding the issues which could affect Kentucky's retired teachers, as well as the news from both the District and Local Members. The first electronic issue, KRTA Express, was in May 2016.

Madison Hackney received top honors as the 2016 Grandparent of the Year Essay Contest. A student at Feds Creek Elementary School in Pike County. Her essay was selected from thousands of student entries across 278 schools in 120 Kentucky counties. (See June 2016 KRTA News)

After 15 years as KRTA's Third Executive Director, Dr. Robert V. Wagoner announced in November his retirement, effective July 2017. KRTA President Cathy Gullett and KRTA Executive Council accepted his resignation, announced, and posted the open position, including the job description, and the procedure for applying.

In January of 2017, KRTA began the transitioning process to new leadership with the announcement of Mr. Tim Abrams being selected as the Fourth and the next KRTA Executive Director-Elect with his duties beginning immediately. In 2016-17 KRTA membership was 31,354 of a potential membership of 45,270 (69.3%), 25,029 auto deduction members and 6,325 cash members.

On July 1, 2017, Romanza Johnson (Third District) took the reigns as KRTA President. Her theme was "Racing Forward with KRTA in Kentucky." Like many KRTA Presidents before, her focus was upon KRTA membership. She also emphasized KRTA supported programs such as the AARP grandparent essay contest, and a Volunteer of the Year entry from each county. Local KRTA districts were encouraged to focus upon collecting can goods and school supplies, promoting Retired Teacher's Week and other projects in their community.

In January 2018, KRTA was rocked by the sudden brief illness and premature death of Dr. Robert V. Wagoner, KRTA's Executive Director. Mr. Abrams, who at the time had been mentored by Dr. Wagoner, picked up the mantle of Executive Director and began guiding and leading the organization into a new era. It was a season of learning, growing and dramatic change, all the while encouraging members to "Stay Engaged in the Political Process and growing Membership."

With the Kentucky legislature now in session, KRTA members were challenged to participate by contacting their legislator and to build a relationship with them, to know the issues that affect retired Kentucky teachers, and to be honest and constructive as they informed them of said concerns.

The 2018 KRTA Convention theme was "Teamwork Is What We Do!". The Delegate Assembly elected the following officers for 2018-2019: Shirley Dick Wolf, President (Middle Cumberland District), Harold Wilson, President-Elect (Second District), Sue Ellen Caldwell, Vice-President (Fifth District), and Romanza Johnson, Past President (Third District), with their terms to begin on July 1. Shirley had a theme of "Valuing our Past, Strengthening our Present, and Building for our Future".

June 2018 brought the news of long time KRTA Office Manager Carla Hahn's retirement. Carla served KRTA admirably for thirty years. Her employment began with the then Executive Director, Frank Hatfield. With Carla's retirement Emily Carey was asked to fill the shoes of Carla as the new office manager. 2018 KRTA membership was 31,969 of a potential membership of 46,493 (68.8%), 25,464 auto deduction members and 6,505 cash members.

July of 2018 KRTA completed the move from the Hillenbrand House Office Building to a new location at 7800 Leaders Lane near a new entrance to Bates Elementary School.

Prior to becoming KRTA President Cathy G. Gullett served as a member of the Executive Council. During one of their meetings, she posed a question to the council and to Dr. Wagoner, "What does this organization do to recognize the volunteers in this organization?" Later, following her term as KRTA President, she and Dr. Wagoner discussed long term volunteer service recognition at the state level of leadership. An ad hoc committee was formed to study and make recommendations. At the December 2018 Executive Council Meeting, the Executive Council accepted their recommendations for recognizing long term state leaders volunteer service to KRTA.

In January and February of 2019 past KRTA presidents Shirley Dick Wolf and Cathy G. Gullett, along with State Membership Co-chair, Debby Murrell, began the process of researching records and compiling lists of those members names who had completed 10-, 15-, or 20-years' service in State Volunteer Leadership. (State Officers, Executive Council Members, Standing Committee Chairs, Standing Committee Members, and District Presidents). The Executive Council voted to name this award "The Cathy G. Gullett Volunteer State Leadership Award." The first awards were presented at the convention for 10, 15, and 20 years of State Volunteer Leadership to KRTA. (See July 2019 KRTA News)

The State Legislative Session of 2019 brought positive results for Kentucky's retired teachers. First, the A.R.C. was fully funded, the 1.5% COLA was secure, and under age 65 insurance covered for two years. Don Hines, KRTA Legislative Co-Chair reminded members that work was needed to change the annuity tax exemption, which was dropped from \$41,000 to \$31, 000, and secondly to get the second-year insurance back into the state budget.

On May 5, 2019, the new building was dedicated and named, The Dr. Robert V. Wagoner Building. In time, the students at Bates Elementary School had a contest to name the new road. The new name "Leaders Lane," was chosen and became appropriate for both facilities. (See July 2019 KRTA News) KRTA membership was 26,012 of a potential membership of 47,629 (68.8%), 26,012 auto duction members and 6,507 cash members.



Hillenbrand House
7505 Bardstown Road
KRTA's home from 1993-2018



Dr. Robert V Wagoner Building
7800 Leaders Lane
KRTA's home 1998-Present

In 2019-2020 KRTA's primary focus was on the state budget and public education bills. President Harold Wilson, of Owensboro, (Second District) encouraged local and state KRTA efforts on education and pension bills. He also focused on KRTA standing committees and their efforts with volunteerism. Harold used his history in sports for KRTA to encourage KRTA members to remember "Teamwork is Dreamwork".

On October 14 ,2019, Ernest Taylor, long-time Health and Insurance Chairperson for the Fourth District, was honored with a U.S. flag that had flown over the United States Capitol. The flag now stands in the KRTA board room.

The Convention theme was " KRTA Refocus, Review, and Revamp!" However, due to a new and unprecedented COVID-19 virus pandemic, the In-Person KRTA Convention was canceled. KRTA turned to technology for communication and programming. For the first time in history both the KRTA Convention and Pre-registration were moved to an online format. State-wide attendance was very good in this format.

In 2020 text messaging was introduced for the Legislation session enabling members to remain alert to those issues regarding and affecting retired teachers. Text messaging was also introduced to the State Membership Committee for better communication between State, District, and Local Membership Chairs. Both technology tools have proven to be most successful and continue to be utilized by Leadership as well as Members.

On March 17, 2020, the Teacher Retirement System of Kentucky had to postpone all in-person pre-retirement seminars due to Covid-19 until further evaluation could be conducted. KRTA was very involved in attending and presenting at each workshop across the Commonwealth. This was an opportunity to enlist and enroll members prior to their retirement. This postponement has had a negative effect on KRTA achieving higher membership numbers.

In 2020, Sue Ellen Caldwell, President (Fifth District) became the first KRTA President not to travel the commonwealth to both district and local workshops, as well as for meetings. Her focus was on the "Seasons of KRTA - Keeping the Vision Clear." Throughout the year, her challenge was to try new ways to grow KRTA, how to keep the vision clear and how to move forward during uncharted times.

The KRTA Convention was held virtually and showed an increase in attendance over the in-person meetings. Part of the Executive Director's focus for KRTA was on Kentucky Retired Teacher's Week.

Under the leadership of Melanie Wood and Tara Parker, KRTA Past Presidents, the KRTA Constitution and By-Laws were revised and updated. They were first approved at the December 2020 Executive Council Meeting and then at the Delegate Assembly of the 2021 State Convention. (See March 2021 KRTA News)

The legislative focus was to stop the attack on public pensions. Once again Covid prevented travel and the Fall Workshops were held virtually. The Executive Council and the State Committees all met virtually. KRTA membership was 32,498 of a potential membership of 48,967 (66.4%), 26,482 auto deduction members and 6,016 cash members.

In July 2021, Dr. Bill Kelley (Fourth District) became KRTA's next Pandemic President and drew KRTA to focus upon "Building Tomorrow's Leaders Today". Like President Caldwell, he also did not travel to Fall Workshops which were held virtually.

In November 2021, Janie Caslow, KRTA Deputy Executive Director retired having served KRTA for 16 years. Greg Roush became the new Deputy Director.

KRTA was reminded by Tim Abrams, Executive Director, that despite the uncertainty of the times the KRTA leadership continued to step up to strengthen the organization.

2021 was not going to leave quietly as a December tornado wreaked havoc in Western Kentucky. Once again, KRTA and its members stepped up and donated close to \$38,000.00 to the communities devastated by the tornado on December 10th.

The 2022 April Convention Theme was "Refresh, Renew, and Refocus." Following the isolation of the Covid-19 Pandemic, over 300 retired members returned in person to the

annual convention featuring the Master's Men Choir, a Celebration of 100 years of Education through Fashion, and a special session with Mayor Kathy O'Nan, of Mayfield, KY, a retired teacher, and KRTA member who shared how she lived through and responded to the Western Kentucky tornadoes that devastated her town and others.

In July 2022, Golden Hale, (Upper Kentucky River) became President with a theme of "Growing Membership". Charlotte Lindley retired as receptionist for KRTA. Ernie Troser served KRTA as President in 2001 -2002. On completion of that term, he served as State Membership Co-Chair until June 2019. He served KRTA for over 20 years as a state volunteer. Ernie's passing in September of 2022 has left a great legacy as a role model for membership and leadership. His contributions remain deeply in the roots of KRTA.

Once again tragedy hit the Commonwealth, this time with devastating floods ravaging Eastern Kentucky. Once more, KRTA members stepped up to assist other retired members. Funds were collected in the Bourgard Fund and \$33,364 was distributed to help KRTA members in the flood ravaged areas.

To close the year 2022, appointed members of the State Membership Committee completed their revisions for a new user-friendly KRTA Membership Handbook, including resources for both districts and locals. (online edition www.krta.org/resources)

In January of 2023, KRTA lost another leader, in the passing of past state president, Shirley Dick Wolfe. She had served as President of Middle Cumberland District as well as District Membership Chair. She served as KRTA President 2018-2019.

The April 2023 KRTA Convention focus was "Puzzle Pieces Fit Together...Ways to Empower, Engage, Enable, Enrich, and Educate." The convention program featured another first with a Membership Leadership Training Workshop, led by State Membership Co-Chair, Debby Murrell. The workshop was based upon President Hale's emphasis on the importance of membership in KRTA and titled "The Nuts and Bolts of KRTA Membership". The workshop was attended by over 65 KRTA district leaders and members with special assistance from district membership chairs, Becky Woods, (Fifth District), Sherry Radford and Pamela Napier (Third District), Wanda Mollett (Big Sandy), Michael Caudill (Upper Kentucky River) and Patsy Young (Fourth District).

There was a change in Health insurance as Renew Active replaced Silver Sneakers, while Kroger chose to no longer participate in Express Scripts prescriptions for retired teachers over 65. Carolyn L. Wells from Todd County received the Frank Hatfield Volunteer of the Year Award.

State Officers for 2023-2024 were elected in April and began their terms July 1 with Steve Gillispie President (Central Kentucky East District), Dr. Rick Tatum President Elect (Jefferson District), Ann Porter Vice President (Eastern District), and Golden Hale Past

President (Upper Kentucky River). KRTA membership was 31,678 of a potential membership of 43,828 (72.3%), 26,493 auto deduction members and 5,185 cash members.

August 2023 found other leadership changes as Ed Cooke, III stepped aside as Health and Insurance Co-Chair. The Executive Council created the position of KRTA Volunteer Leadership Chair, and Ed became the Chair. Other leadership changes occurring were Health and Insurance Co-Chair, Margaret Head Sims, was moved up to Chair. Due to the retirement of Betty Hester as Membership Co-Chair, Deborah "Debby" Murrell was moved up to Membership Chair.

On July 1, 2023, Betty Hester stepped down as KRTA Membership Co-Chair. Betty served KRTA in a variety of ways, as Deputy Director and then as Membership Data Base Coordinator. Among the things Betty developed and designed were the Membership Power Point presentation for Fall Workshops, the first membership handbook, and two membership achievement awards for KRTA locals and districts: The Yes, WE Did Award and the Top Hat Award. Her contributions to KRTA and membership have been invaluable.

The chart below shows the economic impact of The Teacher's Retirement System across Kentucky. Please note that the data from 2002-2012 includes only the retirement annuities for retirees and does not include medical benefits. The starred statewide payments include the medical benefits. However, 2023 does not include medical benefits as those numbers have not been audited and will be updated when available. For information on individual counties, please contact KRTA.

Economic Impact and Number of Recipients from the Teacher Retirement System by Year

Fiscal Year Ending June 30 of Indicated Year	Distribution of Retirement Payments Statewide	Number of Recipients
2002	\$680,851,141	31,055
2003	\$752,767,622	32,105
2004	\$815,044,670	33,070
2005	\$887,781,063	34,569
2006	\$954,156,419	35,646
2007	\$1,018,968,054	36,536
2008	\$1,080,600,989	37,548
2009	\$1,155,934,030	38,614
2010	\$1,218,273,958	39,601
2011	\$1,292,541,490	40,710
2012	\$1,364,498,398	35,236
2013	\$1,594,389,575 *	43,410

2014	\$1,667,661,018 *	44,386
2015	\$1,818,894,651*	45,795
2016	\$1,943,431,998*	47,121
2017	\$1,916,244,959*	48,801
2018	\$1,975,398,180*	49,575
2019	\$2,056,992,510*	50,544
2020	\$2,102,818,158*	41,263
2021	\$2,153,080,507*	52,106
2022	\$2,217,278,635*	52,874
2023	\$2,161,039,232	54,940

*Distribution of Retirement and Medical Payments Statewide

Source: *Teachers' Retirement System of the State of Kentucky, Annual Comprehensive Financial Reports*