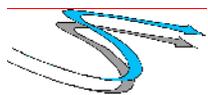




LOCAL PRESIDENT'S HANDBOOK



Providing Direction for 2025-2026

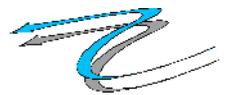


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PART II: LEARNING ABOUT OUR KRTA

The following may be helpful in your efforts to promote the Kentucky Retired Teachers Association. **Forms** may be **duplicated** and given to new retirees as well as current members. **The more we know, the better we can represent the benefits of KRTA to others.**

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INTRODUCTION

This *Local President's Handbook* is provided as a guide for the local association presidents for the 2025-2026 membership year. KRTA's membership and fiscal year runs from 07/01-06/30.

Presidents are encouraged to pull forms from this handbook when report due notices are received from the KRTA office. Forms that represent suggested activities may be used in any way that may be helpful. KRTA documents may be duplicated and distributed as needed for both current and prospective members.

This is a working copy from which to draw the needed report forms. Share pages with local officers, chairpersons and members.

A few revisions are made each year to this local president's handbook. Please give us your suggestions for additions, deletions and revisions—anything you feel would make it more helpful to you as a local association president.

WE THANK YOU FOR VOLUNTEERING TO BE A LOCAL PRESIDENT-
THE KRTA OFFICE IS ALWAYS HERE TO SUPPORT YOU AND YOUR LOCAL!!!

CONTACT US ANYTIME

1-800-551-7979
info@krta.org
M-TH 8:30-4:00
FRIDAY 8:30-2

LOCAL RTA PRESIDENT:

The following checklist is provided for your assistance in completing forms for the KRTA office and progressing with local functions in a timely and efficient manner. Many of these duties may be performed by other local association officers/members, but it is the President's responsibility to see that all required activities are completed.

The various forms are provided for your use this fiscal year (July - June).

- Meet with the local executive committee by July or August to plan programs and meeting dates and places for the upcoming year.
- Make committee assignments and/or ask for volunteers (See *Local Committee Assignment Form 2*). You **do not** need to send this to the KRTA Office.
- Prepare budget for upcoming year.
- Hold a total of 4-6 meetings per year for points on the *Local Association Recognition Program Form 3* (Item 5). Have at least one program per year on Membership, Legislation, Health/Insurance, and Member Care.
 - ◆ **Membership:** Plan promotional activities for local, district, and state membership.
 - ◆ **Legislation:** Inform membership of current legislative issues/ concerns and update them on the State Legislative Program.
 - ◆ **Health/Insurance:** Secure, review, and distribute information pertaining to health and insurance, including maintaining a healthy lifestyle.
 - ◆ **Member Care:** Suggested activities may include visiting nursing homes (or holding meetings in the nursing home if retired teachers presidents and will be posted on the KRTA website at www.krta.org. (See Legislative Committee Responsibilities Form 11)

See *Local Unit Program Suggestions Form 4* for additional program ideas.

- Recognize new retirees at a luncheon, dinner, or reception. Retirees should be introduced to KRTA and given the opportunity to sign an automatic dues deduction (ADD) card. (See *Explanation Form 5A*). Complete *New Retiree Recognition Program Reimbursement Form 5B* and mail it to the KRTA Office after the meeting takes place to receive \$15 for each new retiree in attendance. (Reimbursement may be used to pay for the meals and/or token gifts). Recognition of retirees and application for reimbursement may occur at any time of the year, but it **MUST** be done within the fiscal year (before July 1).

- Working with the Secretary, be responsible for communicating with the membership concerning meetings, legislative and health/insurance updates, and any other “news” that needs to come to the attention of the membership.

- Arrange for a **total of at least five (5) officers and/or committee chairpersons** to attend the Fall Workshop. (See *KRTA Fall Workshop Schedule Form 6*). Send *Fall Workshop Reservations Form 7* to the District Workshop Contact Person by the designated date. You may choose from the following:
 - President
 - VP/President Elect
 - Secretary
 - Treasurer
 - Membership Chair
 - Legislative Chair
 - Health & Insurance Chair
 - Others

Encourage the Vice-President or President-Elect to be actively involved in the activities of the standing committees as an overseer and guide.

- ◆ Membership: Promote local and state membership by planning membership drive(s). You can be most effective by coordination this with the KRTA Office Membership Procedures Form 24. Call the KRTA office for updated membership lists and labels whenever needed. (See *Membership Committee Responsibilities Form 8* and *Local Membership List Correction Form 9*)

- ◆ Legislative: Help with updates to the membership, especially during the meeting of the Kentucky General Assembly. During the General Assembly, regular reports on legislative activities are sent to all local

presidents and will be posted on the KRTA website at www.krta.org.
(See *Legislative Committee Responsibilities Form 11*)

- ◆ Health/Insurance: Help keep membership informed on current insurance concerns and healthy lifestyles. (See *Health/Insurance Committee Responsibilities Form 15*)

➤ **KRTA State Convention (April)**

- ◆ Elect delegates to the KRTA State Convention and return *Delegates to the Delegate Assembly Form 20 along with a check (\$37.00 for each delegate)* to the KRTA office by the designated date. (Guidelines: One delegate per each set of **50** active members.)
 - ◆ Include donations for the N.O. Kimbler Memorial Scholarship Fund and the Bourgard Funs (**a minimum of \$40 for each required for Local Recognition Form item #13 and #14.**)
 - ◆ Tally the total number of volunteer hours and list volunteer activities for the local association for the period January 1-December 31 required for item #19 on the Local Recognition Form
- Complete *Local Association Recognition Program Form 3* and send it to the KRTA office by March 15.
- Elect officers by early June (Send *Local Officers Report Form 1* to KRTA Office as soon as possible). **The fiscal year begins July 1.**
- At any time, send local association news and photos to info@krta.org *accompanied by named persons and named activity for the KRTA News.*
- Use any of the SAMPLE FORMS as you deem helpful for promotion/information.

INTRODUCING....

**LOCAL
ASSOCIATION
REPORT
FORMS**



LOCAL OFFICER FORM

LOCAL: _____ **YEAR:** _____

LOCAL PRESIDENT: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

LOCAL V. PRESIDENT: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

LOCAL TREASURE: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

LOCAL MEMBERSHIP: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

LOCAL LEGISLATIVE: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

LOCAL HEALTH & INS: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

PLEASE HAVE OFFICER FORMS BACK TO THE KRITA OFFICE
BY JULY !, EVEN IF THERE ARE NO CHANGES

SAMPLE LOCAL OFFICER RECOGNITION AND INSTALLATION

On behalf of the Kentucky Retired Teachers Association, I want to publicly recognize the outgoing officers for their dedication to the _____ County RTA during the past year.

Installation of Incoming Local Officers

Now, let's install your new officers. Will the new officers come forward to be recognized as the leadership of the _____ County RTA for the 2025-26 year. Mr. or Madam President please stand on my right and all other officers please stand on my left.

Address to all Officers Except the President

You have been elected to serve as leaders of the _____ County RTA for the 2025-26 year. Do you promise to perform faithfully all the duties of your respective offices as stated in your RTA's By-Laws?

Answer: "We will"

(Installer will give each a certificate)

Address to the President

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

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

Answer: "I will"

(Installer will give the president a certificate)

Address to the Membership

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

Answer: "We will"

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

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

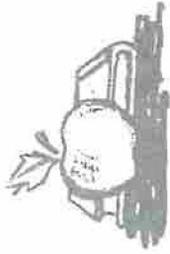
Address to All Members (Officers and Other Members)

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

Please welcome your 2025-26 leaders. Officers you may be seated. Thank you!

Updated: 6/1/25

CONGRATULATIONS!



President
of

County Retired Teachers Association

**Installed this ____ day of _____ . _____
to fulfill the following responsibilities:**

- ◆ Be the executive officer of _____ presiding at all meetings
- ◆ Be responsible for the completion and timely return of forms/reports to the KRTA office as described in the *Local President's Handbook*
- ◆ Be responsible for planning meetings annually with emphasis on Membership, Legislation, and Health/Insurance
- ◆ Be responsible for registering members (through your district president) for the Fall Workshop
- ◆ Promote programs endorsed by KRTA
- ◆ Receive and distribute information during sessions of the General Assembly
- ◆ Report to the KRTA office on local activities

LOCAL COMMITTEE ASSIGNMENT/SIGN-UP

These are suggested committees that may be formed to help lighten the work of the President. The Vice-President or President-Elect may oversee/coordinate their work.

Legislative Committee

_____, Chair

Caring Committee

_____, Chair

Health/Insurance Committee

_____, Chair

Hospitality Committee

_____, Chair

Membership Committee

_____, Chair

Community Service Committee

_____, Chair

Communications Committee

_____, Secretary

Devotion Committee

_____, Chair

Public Relations Committee

_____, Chair

Finance Committee

_____, Treasurer

Program Committee

_____, Chair

Telephone Committee

_____, Chair

LOCAL ASSOCIATION RECOGNITION PROGRAM

Association Name: _____

PURPOSE: The purposes of this program are two-fold:

- 1) To encourage local associations to support the programs and goals of KRTA.
- 2) To recognize those associations that are most successful in supporting and carrying out those programs and goals.

PROCEDURE: The Local Association President should complete the following rating scale by filling in the appropriate number of points for each item based on his/her Association's activity. (Items 1, 2 & 3 will be completed at the KRTA office).

The completed form must be returned to the KRTA office 7800 Leaders Lane, Louisville, KY 40291 by March 15.

Local Associations who receive sufficient points will be recognized at the Annual Convention and presented with a certificate of merit. Levels of recognition will include:

Gold Seal	425 Points
Silver Seal	375 Points
Bronze Seal	325 Points

CRITERIA:

1. **Points based on Percent of local and district members: paying dues to your local RTA**

_____ local RTA members paying dues

(20-49%=5, 50-64%=10, 65-79%=20, 80-94%=30, 95-100%=40)

2. **Points based on potential members belonging to KRTA**

(25-49%= 5, 50-64%= 10, 65-79%= 20, 80-94%=30, 95-100%= 40)

3. **Points based on membership increase percentage**

(1%=10, 2%=20, 3%=30, 4%=40, 5%= 50 or if 80% or higher= 50)

KRTA will calculate the points for #1, 2 and #3

4. **Holds**

Three (3) meetings per year	15 Points	_____
or		
Four (4) or more meetings per year	20 Points	_____

5. Has at least one program per year on Health and Insurance, Membership, Legislation

Health & Insurance	15 Points	_____
Membership	15 Points	_____
Legislation	15 Points	_____
Member Care	15 Points	_____
Other	15 Points	_____

6. School Supply 10 Points
**** (Number of bags of school supplies _____ or \$ _____ contributed)**

Feed Kentucky Program	10 Points	_____
** (Number of food items _____ or \$ _____ contributed)		
Other	10 Points	_____
** (i.e. Relay for Life, Blood Drives, Food Banks, etc.)		
Explain briefly:		

7. Grandparent Essay Contest 15 Points

8. Contacts new retirees about joining local and state association using labels provided monthly to the local association president by KRTA

20 Points _____

9. Holds meeting to honor new retirees and distributes KRTA materials including ADD cards to those attending 15 Points

10. Officers and/or committee chairs attend the Fall Workshop

1-3 10 Points _____

4 or more 20 Points _____

11. Officers are elected prior to July 1 of the year they are to begin serving and notice sent to the KRTA office 20 Points

12. Delegates are elected and attend the state convention 25 Points

13. Makes a contribution of \$40 or more to the Kimbler Scholarship Fund 10 Points

14. Makes a contribution of \$40 or more to the Bourgard Fund 10 Points

15. Makes a contribution of \$80 to Kimbler and Bourgard Fund 10 Points

16. Maintains active committees in the following areas:

Health and Insurance	20 Points	_____
Legislation	20 Points	_____
Membership/Pre-Retirement	20 Points	_____

LOCAL ASSOCIATION RECOGNITION PROGRAM

17. Makes periodic contacts with legislators concerning current issues

Explain Briefly

20 Points

18. Distributes local RTA news (printed or electronic) to members (attach a sample)

10 Points

19. Individual members contribute to the community through volunteer engagement activities (ie. Nursing homes, assisted living facilities, schools, hospitals, churches, NRTA National Day of Service, Tax Aid, Drive Alive, etc.)

15 Points

Total Volunteer Hours for Local (January 1-December 31):

Total Hours: _____

***** Volunteer with the most hours:** _____ **Hours:** _____

***** Volunteer with the most hours with youth:** _____ **Hours:** _____

Explain briefly:

**** Required to earn points**

***** Optional/not required**

LOCAL ASSOCIATION

PRESIDENT

PRESIDENT'S PHONE NUMBER

DATE

LOCAL ASSOCIATION PROGRAM SUGGESTIONS/SPEAKERS

- AARP Speakers
- Estate Planning by a local attorney
- Finance & Investment Services (Call Hank Hensley, 1-800-927-0030)
- Health & Insurance by a representative from KRTA (Sue Ellen Caldwell)
- Legislation by a representative from KRTA (Larry Woods and Steve Gillespie)
- Membership by a representative from KRTA (Michael Caudill, Chrissy Jones & Sherry Radford)
- Taxes and New Legislation by a CPA
- Travelogue by local members
- Education Reform by Legislators
- Program honoring new retirees
- Schools and philosophy of education by the County superintendent
- Director of Adult Education
- Program presented by a school group
- Medicines and use of the computer in keeping up with an one's medical history by a Pharmacist
- Overview of the services available to the community by a Mental Health Services speaker
- Cancer by a Cancer Clinic representative
- The Living Will (Draft form available at KRTA office)
- Hospice services offered
- Positive attitude speaker
- Update on KRTA by a KRTA representative (Greg Roush, Executive Director, or officers: Ann Porter, Charlotte Benton, Meg Judd or Rick Tatum)
- Long-term health care
- Historical Society speaker
- Life in another country by an exchange student
- The Needs and Rewards of Volunteerism
- Self-Protection by a member of local police department
- Health Program emphasizing diabetes, cholesterol and high blood pressure
- Sponsor 55 Alive Drivers Training Program from AARP
- Vision after 50 by an eye specialist
- Relaxation Techniques
- Memorial Service
- Inspiration
- Book Reviews
- Panel discussions on current events
- "Show and Tell"—Each member bring samples of work they are involved with during retirement (crafts, paintings, flowers, etc.).

KRTA COMMITTEE CO-CHAIRS

LEGISLATIVE CO-CHAIRS

Steve Gillespie
(859) 582-1755
stkkillespie@gmail.com

Larry Woods
(859) 742-1377/(270) 999-1121
lkw53@windstream.net



Steve Gillespie



Larry Woods

HEALTH & INSURANCE CO-CHAIRS

Sue Ellen Caldwell
(502) 395-0251
s8caldwell@aol.com

Sheilia Wilkinson |
(270) 319-2065 |
sheliawilk@comcast.net



Sue Ellen Caldwell



Shelia Wilkinson

MEMBERSHIP CO-CHAIRS

Michael Caudill
(606) 454-4052
M48ortal@gmail.com

Chrissy Jones
(502) 330-0130
mcjeducate@gmail.com



Sherry Radford
(270)459-0858
Sherryradford94@gmail.com



CONTACT ANY OF THESE CHAIRS IF YOU NEED SPEAKERS OR ASSISTANCE

Grandparent of the Year Essay Contest 2025-26 GUIDELINES



*Access this information & all contest forms online at aarp.org/kygrandparentessay

SUBJECT: “Why my Grandparent should be the AARP Kentucky Grandparent of the Year”

ELIGIBILITY: Contest is administered by the Kentucky Retired Teachers Association and is for 5th graders in Kentucky public schools.

TECHNICAL REQUIREMENTS (must meet ALL criteria to proceed):

- Must be an original work of the author and can be submitted either: 1) handwritten on one side only, on white, lined 8”x11” paper OR 2) type-written, double-spaced, in a digital file (*please check with your District/County unit leaders what option(s) your school should use*).
- 300-500 words in length, written in English (*Every word -a, in, the, etc.- counts towards the word count*).
- Essay must be written about (only) one grandparent or surrogate grandparent, (e.g. someone the child considers to be “like a grandparent”) who is alive at the time the essay is written.
- Include the components of a formal essay (introduction, supporting points and conclusion).
- Name and school of the author must be included at the end of the essay.
- The winning essay from each school must be submitted with an official entry form. The entry forms can be photocopied.

DEADLINES:

- **School winner deadline: December 15, 2025**
- **County winner deadline: January 31, 2026**
- **District winner deadline: March 1, 2026**

State winner will be announced at the Kentucky Retired Teachers Association (KRTA) Annual Meeting in April 2026. **Entries postmarked or received at the AARP Kentucky P.O. Box after the stated deadlines cannot be considered.** Mail to: AARP Kentucky, P.O. Box 910294, Lexington, KY 40591-0294

JUDGING CRITERIA & AWARDS:

- Qualifying characteristics of nominee *as a grandparent* or surrogate grandparent 50%
- Creativity & Expression 30%
- Grammar, Form & Neatness 20%

School winner: Chosen by 5th grade teachers from the submitting school. There can be only one school winner per school; both the participating school and its winner will receive a certificate. If only one school in a county participates, then the School winner is automatically the County winner.

County winner: Chosen by the RTA Local President and/or Unit. Each County winner will receive an embossed certificate. If there is only one county in the District, then the County winner is automatically the District winner.

District winner: Chosen by KRTA District President and/or officers. Each District winner will receive a plaque and a \$100 award. (*Note: \$50 increase from past years*)

State winner: Chosen by a panel of state level KRTA and AARP officials. The state winner will receive a plaque, a \$500 award (*\$400 increase*) and an expense paid trip (by AARP) to the KRTA Convention. The winning student’s teacher will receive a check for \$500 towards school supplies (*\$350 increase*).

Teacher winners: All Teachers’ names of each participating student will be in a drawing at the KRTA Convention. Two winning teachers will each receive a \$250 gift card for school supplies (*\$350 increase to \$500, split to two recipients*).

AARP/KRTA Grandparent Essay 2025-26

SCHOOL WINNER

Student Information

County: _____

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

Grandparent First & Last Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

Parent/Guardian Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

School Information

Name of school: _____ Word Count (300-500): _____

School Address: _____ City: _____ Zip: _____

School Phone: _____ Teacher Name (First & Last): _____

In order to compete at the County level, **both steps** must be completed by December 15th:

- 1) Complete the form online at aarp.org/kygrandparentessay
***Must be completed to receive certificate and continue to county level.**
Local essay chairperson should verify this step has been completed.
- 2) Mail or Email this form and handwritten or digital essay to the local RTA contact listed below.
DO NOT MAIL THE ORIGINAL ESSAY TO THE AARP OFFICE.
CHECK WITH RTA CONTACT IF EMAIL IS OKAY.

Unless notified otherwise, AARP Kentucky will mail certificates for the school winner and participating school directly to the school teacher for presentation.

Local RTA President/Chairperson Information (Fill out your information before leaving it with the school)

Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

DEADLINE: DECEMBER 15, 2025

All entries become the property of AARP Kentucky and KRTA who reserve the right to print said entries in AARP/KRTA news releases and publications. All information is governed by AARP and KRTA's privacy policies. For contest questions, please visit aarp.org/kygrandparentessay, email cjackson@aarp.org, or call 502-394-3420.



AARP/KRTA Grandparent Essay 2025-26

COUNTY WINNER

Student Information

County: _____

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

Grandparent First & Last Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

Parent/Guardian Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

School Information

Name of school: _____ Word Count (300-500): _____

School Address: _____ City: _____ Zip: _____

School Phone: _____ Teacher Name (First & Last): _____

In order to compete at the District level, **both steps** must be completed by January 31st:

- 1) Make a **copy** of this form and mail OR Email to:
Christine Jackson OR cjackson@aarp.org
AARP Kentucky
P.O. Box 910294
Lexington, KY 40591-0294
- 2) Mail the **original** form and handwritten essay or digital essay to your **District RTA President**.
DO NOT MAIL THE ORIGINAL ESSAY TO THE AARP OFFICE.
CHECK WITH RTA President IF EMAIL IS OKAY

Unless notified otherwise, AARP Kentucky will mail an embossed certificate for the county winner directly to the Local RTA President for presentation. Please send copies of any photos, newspaper clippings and other publicity from the presentation. A sample news release is attached to assist you with that task.

Local RTA President/Chairperson Information

Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

DEADLINE: JANUARY 31, 2026

All entries become the property of AARP Kentucky and KRTA who reserve the right to print said entries in AARP/KRTA news releases and publications. All information is governed by AARP and KRTA's privacy policies. For contest questions, please visit aarp.org/kygrandparentessay, email cjackson@aarp.org, or call 502-394-3420.



AARP/KRTA Grandparent Essay 2025-26

DISTRICT WINNER

County: _____ District: _____

Student Information

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

Grandparent First & Last Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

Parent/Guardian Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

School Information

Name of school: _____ Word Count (300-500): _____

School Address: _____ City: _____ Zip: _____

School Phone: _____ Teacher Name (First & Last): _____

In order to compete at the State level, the winning District essay must be attached to this form and mailed OR Emailed by March 1st to:

[Christine Jackson, AARP Kentucky, P.O. Box 910294, Lexington, KY 40591-0294 or Email: cjackson@aarp.org](mailto:cjackson@aarp.org)

AARP KY will mail a plaque and \$100 check for the District winner directly to the District or Local RTA President/Chairperson designated below. Because these awards take more time to process than certificates, they must be mailed out between March 20th and April 1st. Please make arrangements for presenting them to the District winner sometime after April 1st.

When you make your presentation, please send copies of any photos, newspaper clippings, and other publicity from the presentation. A sample news release will accompany the plaque to assist you with that task.

RTA District or Local President/Chairperson Information (who will make presentation to winner)

Name: _____

Address: _____ City: _____ Zip: _____

Phone: _____ Email: _____

DEADLINE: MARCH 1, 2026

All entries become the property of AARP Kentucky and KRTA who reserve the right to print said entries in AARP/KRTA news releases and publications. All information is governed by AARP and KRTA's privacy policies. For contest questions, please visit aarp.org/kygrandparentessay, email cjackson@aarp.org, or call 502-394-3420.



NEW RETIREE RECOGNITION PROGRAM

EXPLANATION

The KRTA will reimburse the local association \$15 for each new retiree who attends a luncheon, dinner, or reception held by the local association in recognition of the new retirees.

This event may be a special meeting held solely for this purpose or a regular meeting where a special invitation is given to new retirees, and they are recognized in a significant way.

To receive reimbursement, the local president should complete the form on the following page (Form 5B) and mail it to the KRTA office after the meeting takes place.

During these meetings, new retirees should be introduced to KRTA and given an opportunity to sign an automatic dues deduction card. The KRTA office will provide you with Membership Brochures, ADD cards, and other needed materials upon request. If you are planning such an activity and have questions, please call 1-800-551-7979.

Funds for this event will be available annually (fiscal year is July 1-June 30). In addition to new retirees, locals may invite other non-members who have not previously attended a Recognition Program.

This kind of activity has worked well in local associations where it has been tried. You are encouraged to take advantage of this opportunity.

NEW RETIREE RECOGNITION PROGRAM
REIMBURSEMENT FORM

LOCAL ASSOCIATION

DATE

NEW RETIREES IN ATTENDANCE:

<hr/>	<hr/>

DESCRIBE BRIEFLY THE KIND OF MEETING (LUNCHEON, DINNER, RECEPTION, ETC.) HELD AND THE PROGRAM PRESENTED. WE WOULD APPRECIATE A COPY OF THE PROGRAM AND/OR AGENDA IF AVAILABLE.

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

No. of ADD Cards Signed and Returned: _____
TOTAL

Name of Local Association

Local Unit President's Signature

_(_____) _____
Phone Number

Please return reimbursement check to the following person:

_____/_____
Name **Street & Number or Box & Route**

_____/_____/_____
City **State** **Zip Code**

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

DISTRICT	DATE	PLACE		CONTACT PERSON
Fifth	Thurs. Aug 21 9:00 AM (ET)	Shelbyville Conference and Welcome Center 219 Seventh St Shelbyville, KY 40065	L	Dawn Scroggins 60 Monroe Lane Campbellsburg, KY 40011
Jefferson County	Fri. Aug 22 10:00 AM (ET)	Wildwood Country Club 5000 Bardstown Rd. Louisville KY	L	Vicki Lete 106 Falcon CT New Labany IN 47150 812-944-2633
Central Ky East	Mon. Aug 25 9:00 AM (ET)	Boone Tavern B Berea		Judy Baugh 325 Wylwood Way Berea, KY 40403 859-661-1006
Central Ky West	Tues. Aug 26 9:00 AM (ET)	Clarion Hotel Conference Center 1950 Newtown Pike Lexington, KY 40511	L	Lisa Petrey-Kirk 5001 Chaplin Rd Willisburg, KY 40078 502-680-0740
Northern	Wed. Aug 27 9:00 AM (ET)	Triple Crown Country Club 1 Triple Crown Blvd Union, KY 41091	L	Brenda Montgomery 174 Klee Rd Falmouth, KY 41040 859-462-3805
Eastern	Thurs. Aug. 28 9:00 AM (ET)	Morehead State University Student Center Ballroom A	B	Ann Porter P.O. Box 88 Washington, KY 41096 606 584-2510
First	Mon. Sep 8 9:00 AM (CT)	Kenlake State Park 542 Kenlake Rd Hardin, KY 42048	B	Charlotte Benton 3705 Apperson Rd Kevil KY 42053 270-564-4469
Second	Tues. Sep 9 9:00 AM (CT)	The Depot Gift Shop/ Henderson Tourist B Commission 101 N Water Street Henderson, KY 42420		Susan Weatherford 1290 College Dr Madisonville, KY 42431 270-836-7641
Third	Wed. Sep 10 9:00 AM (CT)	Barren River State Park 1149 State Park Rd. Lucas, KY 42156	L	Bobbi Porter 107 Southdale Drive Hartford, KY 42347 (270) 256-0195
Fourth	Thurs. Sep 11 8:30 AM (CT) 9:30 AM (ET)	EC3 L 200 Univeristy Dr Elizabethtown, KY 42701		Shelia Wilkinson 1301 Burns Rd Radcliff, KY 40160 270-319-2065
Middle Cumberland	Mon. Sep 15 8:30 AM (CT) 9:30 AM (ET)	First Baptist Somerset 128 N. Main Street Somerset, KY 42501	B	Tishana Cundiff 11181 South KY 501 Liberty, KY 42539 606-303-1132
Upper Cumberland	Tues. Sep 16 9:00 AM (ET)	Pine Mountain State Park 1050 State Park Rd Pineville, KY 40977	B	Paula Adams/Sherry Skaggs 340 Greers Chapel Road Harrogate, TN 37752 423-869-8496
Upper Ky River	Wed. Sep. 17 9:00 AM (ET)	LKLP Jobsite Building 412 Campbell Drive Hazard, KY 41702	L	Karen Griffith 20 Twin Cedar Rd Jackson, KY 41339 606-568-0113
Big Sandy	Thurs. Sep. 18 9:00 AM (ET)	Jenny Wiley State Park 75 Theatre Ct Prestonburg, KY 41653	L	Thomas Saylor PO Box 1715 Paintsville, KY 41240

KRTA FALL WORKSHOP RESERVATIONS

NAME OF LOCAL ASSOCIATION

DATE

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

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

LOCAL RTA RESERVATIONS PAID FOR BY :

NAME

COUNTY

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

OTHER MEMBERS ATTENDING AT THEIR OWN OR LOCAL RTA EXPENSE:

NAME

COUNTY

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

USE BACK OF PAGE IF MORE SPACE IS NEEDED.

COMMITTEE RESPONSIBILITIES

Committees are the means by which members serve the community and the local RTA, develop friendships, and provide visibility for the local association. The appointment of committee chairpersons is generally the responsibility of the president.

Committees can be standing (functioning throughout the year) and special or ad hoc (functioning only as needed or to serve a new or special function). The number of committees varies from six to ten or more, depending on the needs and size of the local association.

It is advisable to involve as many members as possible in committee work. The president is an ex-officio member of all committees; however, the vice-president and/or president-elect could serve as coordinator of the committees.

The one-person committee should be avoided. At least one additional committee member should be able to take on an assignment if the chairperson is absent or otherwise unable to serve.

Responsibilities of the Chairperson

1. Recruit committee members.
2. Hold regular meetings with or make regular contact with committee members.
3. Develop, with the committee, goals and a plan for the year.
4. Delegate specific tasks to committee members.
5. Motivate committee members to do the work of the committee.
6. Work with other committee chairpersons to see that overlapping topic areas are well coordinated.
7. Write committee reports for the Local President, Executive Committee, and the membership.
8. Present committee reports at local RTA meetings.
9. Communicate with the KRTA to coordinate state and local committee goals.
10. Attend KRTA and/or District sponsored workshops as designated.



ACTION!

MEMBERSHIP COMMITTEE RESPONSIBILITIES

The purpose of the Membership Committee is to recruit, retain and regain members for the local and district RTA and KRTA. For its success, the cooperative support of all officers and the general membership is needed.

Specific Suggestions

1. Meet regularly to update membership rolls according to revisions made at the KRTA office.
2. Develop a membership campaign. (Teachers retire every month; get updates from the KRTA office).
Step 1: Set membership goals.
Step 2: Know your prospective members.
Step 3: Develop a list of reasons for joining the local and state associations. (Adapt available materials for your needs).
Step 4: Develop methods for contacting prospective members.
Step 5: Retain members who have belonged.
Step 6: Report on and evaluate the campaign.
3. Introduce the membership campaign to the local membership and enlist their assistance.
4. Use membership recruitment materials contained in this *Local President's Handbook* and call the KRTA office for other materials that may come available.
5. Call the KRTA office for updated membership lists and mailing labels.
6. Be informed! The better informed you are about the benefits of belonging the better "ambassador" you will be!
7. Encourage the general membership to make personal contacts with new retirees possible.



MEMBERSHIP CO-CHAIRS

Sherry Radford
sherryradford94@gmail.com
(270) 459-0858

Mike Caudill
m48ortal@gmail.com
(606) 454-4052

Chrissy Jones
mcjeducate@gmail.com
(502) 747-5830

KRTA

LOCAL MEMBERSHIP LIST CORRECTION

LOCAL ASSOCIATION _____ PRESIDENT _____
 ADDRESS _____ PHONE _____

KRTA prepares lists per county of retirees who are potential members of KRTA. Each is listed according to the location of his/her post office address; however, for professional and/or personal reasons, some may prefer to be listed elsewhere.

TO MAKE SUCH A CHANGE:

1. Confirm the desired change with the retiree.
2. Notify the other association of retiree's choice.
3. Complete SECTION I below and mail it to the KRTA office.

	SECTION I	
NAME	OMIT FROM COUNTY	ADD TO COUNTY

The local may request the removal of a name from their list to Not Interested list if the reason is appropriate. Some reasons may include being retired for 10 or more years and has never been a member, incapacitated, living out of state or other. Please use SECTION II.

	SECTION II
NAME	REASON FOR OMITTING

Upon completion, please return this form to the KRTA office, 7800 Leaders Lane, Louisville, KY 40291-3234

SAMPLE MEMBERSHIP SOLICITATION LETTERS

The following paragraphs are examples that may be used in solicitation letters. Your local will want to revise them according to your own situation and print them on your own local or personal stationery.

Congratulations on your (*upcoming*) retirement. You have good reason to be proud of your years as an educator, and we think you will want to maintain your professional ties by joining your retired colleagues in the _____ Retired Teachers Association.

As a member, you will enjoy keeping in touch with other retired or former teachers through lively (*monthly/quarterly*) meetings and special recreational events. You will find opportunities for involvement in meaningful service projects that benefit both the membership and the community. You will be offered stimulating programs on such topics as crime prevention, physical fitness, income tax savings, consumer awareness, and safe driving.

At this time why not also consider joining the Kentucky Retired Teachers Association. KRTA speaks up for our benefits and welfare at the state and national levels. You can add your voice to this effort by joining both organizations today. All you need do is return \$____ for the local and the Automatic Dues Deduction card for KRTA (for automatic deduction of the \$20 from your November annuity check). KRTA membership on a cash basis is also an option.

You are invited to be a guest at a meeting of the _____ RTA on _____ at _____ in _____. We plan a luncheon and presentation on _____. Please join us.

Recently, President _____ of the _____ RTA wrote inviting you to join our organization.

We hope that your silence means only that you haven't had time to fill out your application. We urge you once again to join your colleagues in an organization that offers a chance to enjoy congenial company and the opportunity for many meaningful projects and programs to enrich your life, as well as open communication for needed information on legislation and health/insurance concerns.

Please let me hear from you today.

LEGISLATIVE COMMITTEE RESPONSIBILITY

The purpose of the Legislative Committee is to provide leadership to the general membership in promoting and monitoring legislation that will affect the members and all older persons. By taking a stand on community issues, this committee can effectively mobilize support for legislation at local, state, and national levels of government by communicating to local members the importance of a strong response to legislative issues at each of these levels. The Committee then serves to inform the membership of current legislative issues/concerns and updates them on the State Legislative Program. (See **Legislative News** on the KRTA website www.krta.org).

Specific Suggestions

1. Meet regularly to update committee members on the status of current issues.
2. Develop a plan to gain knowledge, disseminate information, and make contacts with legislators.
 Step 1: Establish the key issues.
 Step 2: Develop a plan for legislative action.
 Step 3: Implement the plan.
 Step 4: Report on and evaluate the local legislative activity.
3. Introduce the legislative plan to the local membership and enlist their assistance (a working session for letter writing, for instance).
4. Use materials contained in this *Local President’s Handbook* and call the KRTA office for other materials that may come available.
5. Become knowledgeable about the legislative process, the issues at hand, and the most effective means of participating in the process.
6. Encourage the general membership to establish rapport with legislators and other key figures in government. Establishing a local presence in your county and/or city can gain success in advocacy for seniors and retired educators.

Ideas for Legislative Program Projects

1. Organize or participate in voter registration drives.
2. Hold panel discussions and invite spokespersons from all political parties to participate.
3. Organize a letter writing campaign to support or oppose specific legislation. (See *Communicating with Members of the General Assembly Form 12* and *The Right and the Wrong Way to Write to Legislators Form 13*).
4. Visit the state capital with a specific purpose in mind. (See *How to Visit Your Legislator Form 14*).
5. Organize or participate in a legislative phone network.

KRTA LEGISLATIVE COMMITTEE CO-CHAIRS

Steve Gillespie
 1646 Foxhaven #2
 Richmond, KY 40475
 (859) 582-1755
stkgillespie@gmail.com

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

COMMUNICATING WITH MEMBERS OF THE GENERAL ASSEMBLY

Each legislator has the responsibility to represent you and your interests at the state level, regardless of how you voted. They cannot represent you, however, if they do not know your positions on the issues at hand. The following is a list of general tips on how to communicate with Kentucky legislators.

Do's:

Do identify clearly the subject or subjects you are interested in, not just House and Senate bill numbers. Remember, it is easy to get a bill number wrong.

Do state why you are concerned about an issue or issues. Your own personal experience is excellent supporting evidence. Explain how you think an issue will affect your business, profession, community, or family.

Do put your thoughts in your own words. This is especially important if you are responding to something you read. If a member of the General Assembly receives numerous letters with nearly identical wording, he or she may discount them as part of an organized pressure campaign. Even so, pressure campaigns have worked when mail was so voluminous that it had to be weighed rather than read.

Do establish relationships with your own representative and senator. In general, you'll have more influence as a constituent. If you don't know whose district you are in, check the map in the enclosed 1990 Legislative Directory.

Do communicate while legislation is being considered by legislative committees and subcommittees as well as when it is on the House or Senate floor.

Do find out which committees and subcommittees your representative and senator serve on. Members of the General Assembly have much more influence over legislation within their committees' and subcommittees' jurisdiction.

Don'ts

Don't ever, ever threaten. Don't even hint "I'll never vote for you unless you do what I want." Present the best arguments in favor of your position and ask for the legislator's consideration. You needn't remind a legislator of the electoral consequences. Mail and phone calls will be counted without your prompting.

Don't pretend to wield vast political influence. Write members as a constituent, not as a self-appointed spokesperson for your neighborhood, community, or industry. However, if you really are a spokesperson for a group, be sure to mention it.

Don't use trite phrases or cliches. They can make your letter sound mass-produced when it isn't.

Don't become a pen pal. Some legislative offices don't bother to count mail from seemingly tireless letter-writing constituents.



THE RIGHT WAY & THE WRONG WAY TO WRITE TO LEGISLATORS

The Wrong Way

Legislators like to know what company or organization you represent; write on your letterhead.

Date missing.

Senators, like the rest of us, like their names spelled correctly.

"The Honorable," please.

He's in Room 1620.

Senators prefer to be called "Senator _____."

Don't criticize; if you do, the Senator probably won't read past the first sentence.

Why should the bill be passed? Be specific!

Senator John D. Public
Room 1602
Senate of Kentucky
Frankfort, Kentucky 40601

Dear Mr. Public:

The Kentucky Legislature has in the past done some stupid things, but your failure to pass Senate Bill 1984 is almost incredible.

The bill, which would require all manhole covers to be made of plastic, has been passed by the legislators of Wyoming and Alaska and is under consideration by the legislature of several other states.

Why can't Kentucky be first for once?

Yours very truly,

John Doe

The Right Way



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

April 1, 1990

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

Dear Senator Public:

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

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

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

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

Thank you for your consideration.

Sincerely,

John Doe
JD:ab

Always date your correspondence.

Be respectful.

Give specific, practical reasons.

Add a personalized reason.

Be polite and appreciative.



The Kentucky Network

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



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

HOW TO VISIT YOUR LEGISLATOR

A face-to-face meeting with your legislators, whether at the local, state or federal level, can be a highly effective way to transmit your views. As with many other cases where you must ask for support, a personal appeal is often the best method to use in communicating with a lawmaker. Visits might be made:

- 1' to introduce your group to your legislator prior to making contact on specific bills,
- 1' to acquaint a legislator with your views,
- 1' to seek support for or opposition to a specific bill or provision, and/or
- 1' to demonstrate public support for a measure by participating in a “mass lobbying” effort in which members of one or more groups simultaneously descend on the legislature. (Note: This tactic may irritate some lawmakers, but it can demonstrate your strength and get your point across.)

ACTION CHECKLIST

Preliminaries: Planning the Visit

1. Make an appointment in advance. Make clear that you want to discuss issues. Specify alternative times and dates. If you find yourself in your capitol city with some spare time, stop in your legislators’ offices anyway. If lawmakers are in, they may interrupt their work long enough at least to greet you, but chances are they will not have time for a substantive discussion. You should also chat with an aide. Staff members can be of great assistance.
2. Time your visit to have maximum impact on the issues about which you’re concerned:
 - Try to reach legislators before their opinions have been solidified and they have taken public stands on issues;
 - If you’re trying to reinforce earlier work or to influence a vote, plan your visit for shortly before the vote, but choose the right vote to discuss. A committee vote or a vote on an amendment may be more important than the vote on final floor passage.
3. Be aware of legislators’ schedules so you can visit when they are most likely to be available:
 - Important legislative business is usually conducted Tuesday through Thursday, freeing lawmakers for long weekends back home;
 - Often, a good time to find legislators in their office is early or late in the day, before or after committee meetings and legislative sessions;
 - If you cannot see lawmakers in their office, you may call them off the floor or out of a meeting. Unless an important vote is under way or imminent, they should be able to see you briefly;
 - The closing days of a session are hectic and not usually advised for a legislative visit. If, however, consideration of a measure about which you are concerned was postponed until the end of the session, you may want to join the confusion;
 - Legislators have large constituencies, especially United States Senators, and are relatively hard to see personally. (see item 6 below.)

4. Plan your interview in advance:

1' Research your legislators

- look for actions you can praise, and
- study their voting record so you can talk specifically about positions.

1' Research your subject(s)

- obtain background information from other organizations which may be interested in the issue,
- look for specific examples you can cite to show the significance of the subject and the concerns of voters,
- learn the positions of other groups on the issue. Know who supports and who opposes action you advocate, and
- find out what specific legislation related to your issue is pending (with bill numbers, if possible).

5. Reconfirm your appointment just before you plan to set out for the legislator's office. Legislators' schedules are subject to many last-minute changes, and you may have to change the time you have set.
6. Plan to meet with key staff assistants in addition to, or instead of, the legislator. Legislative and administrative assistants are most important conduits for your views. If you impress or persuade them, they will help "sell" your position to the legislator. They may also be more accessible for follow-up contacts.
7. Prepare some written materials you can leave behind at the end of your visit. Get reprints of relevant articles and position papers, or prepare a memo or short fact sheet summarizing your main concerns.

Doing it: The Visit

1. Be on time and don't overstay. Get down to business quickly. Legislators have many demands on their time. Unless you have made special arrangements in advance, plan to get all your points across in ten to twenty minutes.
2. Adopt a friendly, constructive, positive attitude rather than a hostile, belligerent, or uncompromising one. Never threaten. Avoid arguments. Leave legislators with a friendly feeling, even if he turns down your request for support.
3. Mention areas of agreement. Commend the legislator for past actions or announced positions of which you approve.
4. Back up your views with specific, personal examples to show legislators how the issues affect their constituents. Factual reports of what others "back home" are thinking carry a lot of weight with most legislators.
5. Give legislators a chance to talk. You may be surprised at what they know and are interested in learning about.
6. Ask legislators to do some specific things like sponsoring bills, voting for or against pending measures, meeting with your group when they return home, or introducing you to other legislators interested in your issue. Legislators generally like to be of service to constituents in this way.

7. Try to prevent legislators from committing themselves against your position. Leave them undecided rather than committed to the opposing view. If you leave the door open, you may be able to win their support with a better argument you find.
8. Give the legislators some written materials summarizing your main points. Don't assume they have seen articles you have. If they want further information, offer to provide it.
9. Try to meet the legislator's key assistants while you are in their office.

Evaluation and Follow-up

- Write legislators to thank them for their time, to remind them of anything they may have agreed to do and to send them any additional information.
- Report to your group on the results of your meeting. Share any insights you gained about the legislator's attitude and concerns. Make sure private comments are not prematurely publicized, however.
- Develop an ongoing relationship with the legislator through additional visits and correspondence: Invite legislators to meet with your group.
- Keep them informed of developments related to the subject of your visit. Send news clippings or other information that may bolster your arguments.

HEALTH/INSURANCE COMMITTEE RESPONSIBILITIES

The purpose of the Health & Insurance Committee is to secure, review, and distribute information pertaining to health and insurance, including maintaining a healthy lifestyle. This could include the presentation and interpretation of issues concerning the following:

1. State insurance program for retirees under 65
2. TRS insurance program for retirees 65 and over
3. Medicare B for retirees 65 and over
4. Social Security issues for retirees who qualify
5. Long-Term Care Insurance
6. KRTA Endorsed Delta Dental Insurance Programs
7. KRTA Endorsed Avesis Vision Plan
8. KRTA Endorsed Hearing Instrument Plan
9. Research and legislation to improve the quality of physical and mental health services
10. Coping with a complex health care system
11. Adoption of healthier lifestyles
12. Empowerment of retirees to actively participate in their own health care

Specific Suggestions

1. Meet regularly to update committee members on the status of current issues.
2. Develop a plan to gain knowledge and disseminate information to membership
Step 1: Identify needs. Find out what members need to know about health care issues.
Step 2: Determine local resources—time required, magnitude of needs (what committee thinks is most important), special skills required for programs.
Step 3: Select a program or project. (Refer to KRTA Health/Insurance Committee Reports)
Step 4: Conduct the program or project.
Step 5: Evaluate the program or project.
3. Introduce the plan to the local membership and enlist their assistance.
4. Call the KRTA office for information on the state insurance program, brochures describing the insurance benefits available, and health care forms/documents.
5. Designate a committee member for each category of concern; i.e., dental, long-term care insurance, etc.
6. Dora Moore with TRS will attend and present at your local meetings. She can be reached at dora.moore@trs.ky.gov

HEALTH & INSURANCE COMMITTEE CO-CHAIRS

Sue Ellen Caldwell
(502) 395-0251
s8caldwell@aol.com

Shelia Wilkinson
270-319-2065
sheliawilk@comcast.net

SAMPLE LOCAL FACT SHEET

Meetings:

At the Senior Citizens Center, 124 Smith Lane, Smithton, on the second Tuesday of September, December, March, and June. The Social Hour begins at 10:00 a.m., the Business Meeting at 10:30 a.m. and Lunch at 12:00 noon. Meetings are open to all interested retired, former and active educators.

Purposes:

To help Brown County retired educators . . .

- . . . achieve retirement lives of purpose, dignity, and independence
- . . . undertake voluntary projects of benefit to the community
- . . . be informed about issues of interest; such as, insurance, legislation, Medicare, social security

Started: April 9, 1976

Present Active Membership: 152

Membership Information: Regular membership is open to all former or retired educators. Associate membership is open to spouses. Dues are \$5 per year payable by July 1.

Community Service Projects:

1' Annual donation of school and personal supplies for the Special Education students of Brown County Schools.

1' *With Our Youth! Promising New Opportunities!* - Three-year national project in affiliation with NRTA. Volunteer hours with the youth of our community (reading, classroom assistance, mentoring, etc.) are tallied and forwarded to NRTA in support of President Clinton's 1997 Summit on Education.

1' *Connections for Independent Living* - In affiliation with AARP, projects are developed to help our seniors remain in their homes. The first project involved providing the membership with copies of the "Brown County Senior Citizens Information Guide" and distributing copies to the churches in the county.

1' The Brown County *Relay for Life* - Teams participate in the annual cancer drive held each May.

Retirement Planning Program:

The Kentucky Teachers Retirement System provides a workshop for active teachers in the district to help them plan for retirement. In conjunction with the district leadership, assistance and refreshments are provided.

Informative, Protective Service, and Other Programs:

Quarterly meetings feature guest speakers on a variety of subjects, including information on insurance, legislation, and membership. Lunch is served at each meeting for a nominal charge. New retirees are honored with lunch and a token of congratulations at the June meeting. Honorariums are presented for deceased members as appropriate.

President: J. R. Smith, 500 East Second St., Smithton

SAMPLE MEETING AGENDA



- 10:00 **Social Time**
- 10:30 **Welcome** J. R. Smith, President
- 10:33 **Pledge** John Doe, V. President
- 10:35 **Devotional**M. Clark
- 10:40 **Minutes & Correspondence**Betty Brown, Secretary
- 10:43 **Financial Report**Jim White, Treasurer
- 10:45 **Announcements**J. R. Smith
- 10:50 **Committee Reports**
 - CaringDarlene Stone
 - Health/InsuranceLeon Rollins
 - MembershipBetty Luther
 - Community ServiceHelen White
- With Our Youth!*
Connections for Independent Living
Relay for LIFE
- Scholarship Vernon
Chairperson
- 11:25 **Memorial Tribute**J. R. Smith
Yvette Young
- 11:30 **Introduction of Guest**J. R. Smith
Larry Woods
KRTA Legislative Co-Chair
- 11:50 **Door Prizes**Jane Jones
- 12:00 **Lunch**

Acknowledgments

A special thank you to Bud and Anna Rhea Settles, Kenny and Wanda Lutes and the Senior Citizens Staff for allowing us to use their building once again and for preparing another delicious meal.

SAMPLE 1

The Sentinel

**Smithton
Brown County Retired Teachers Association**

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

FOR IMMEDIATE RELEASE

The Brown County Retired Teachers Association will meet at 10:00 a.m. on Thursday, September 8, at the Senior Citizens Center in Smithton. Guest Speaker Bob Jones will present a KRTA Legislative Update. Lunch will be served at 12 noon. All retired educators are welcome to attend.

SAMPLE 2

The Sentinel

**Smithton
Brown County Retired Teachers Association**

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

FOR IMMEDIATE RELEASE

The Brown County Retired Teachers Association and the First District Retired Teachers Association will host the Pre-Retirement Seminar presented by the Teachers Retirement System of Kentucky on Saturday, October 1, at Smithton High School, Preston Hwy., Smithton. The workshop is open to active teachers who are seeking assistance in retirement planning. It is never too early to begin planning for this important period of life. The seminar runs from 8:30 a.m. - 12:00 noon.

DELEGATES TO THE 2026 KRТА DELEGATE ASSEMBLY

PRESIDENT: _____ **LOCAL ASSOCIATION:** _____

DISTRICT: _____

NUMBER OF STATE KRТА MEMBERS: _____ (1 delegate per 50 members)

MAXIMUM NUMBER DELEGATES YOUR LOCAL ASSOCIATION MAY SEND: _____

THE NAMES OF OUR DELEGATES TO THE 2025 KRТА DELEGATE ASSEMBLY ARE AS FOLLOWS:

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

SIGNED BY PRESIDENT

PRESIDENT'S TELEPHONE NUMBER

Return to Greg Roush, Kentucky Retired Teachers Association, 7800 Leaders Lane, Louisville, KY 40291.

This form MUST BE RETURNED WITH A CHECK FOR DELEGATES' REGISTRATION FEES (\$37 PER DELEGATE) to KRТА no later than March 15.

CHECK AMOUNT \$ _____
(Payable to KRТА)

CHECK # _____

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
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. ***



January 1 - December 31

√ Ask your local association members to keep a record of volunteer hours; e.g., nursing homes, assisted facilities, schools, hospitals, etc.

√ Total the hours—break into two categories

- Total volunteering of any kind
- Total volunteering with youth

√ Report on the Local Association Recognition Form

What is a Volunteer?

A volunteer is a person that has a spirit of service, creativity, sensitivity for human pain, strong moral values, the ability to work in a team, and a social conscience. They practice solidarity, leadership, good interpersonal relationships, discipline, communication skills, and care for themselves and others.

What is Volunteer Work?

Formally, volunteer work is work done not for profit. It contributes to a greater cause that is for the good of one's fellow man and society in general.

KRTA VOLUNTEER PROGRAM HOURS

FORM 21
REVISED 5/2014

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

Name _____

Grand Total of Volunteer Hours (January 1 - December 31)

Frank R. Hatfield Volunteer of the Year Award

- Established in 2009

- Criteria:
 - Uniqueness of one volunteer activity for which no pay was received
 - Hours and/or materials donated to one volunteer activity
 - Benefit of the one volunteer activity to recipient(s)

- Timeframe:

At a minimum, the one volunteer activity should encompass January 1st thru December 31.

The one volunteer activity, however, could be since retirement or a lifetime.

- Submission Deadlines:
 - Local RTA- submits name of candidate and a one-page (maximum) document describing the one volunteer activity to the District President by February 3.
 - In the one-page document report what the volunteer did for the good of others. Also, “show” how the one volunteer activity is unique by describing the way in which the recipient (s) benefitted from the efforts of the volunteer.
 - District President establishes a district level committee to review and select a district winner.
 - District President submits the district winners name and supporting document to the KRTA office by March 15th.
 - KRTA officer in charge of the program convenes an Ad Hoc committee to select the state winner.

- Recognition at the Annual Convention of State winner and District winners.

LEARNING ABOUT KRTA PART II



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

The responsibilities of each group above are described in the By-Laws.

ARTICLE V. AFFILIATES

The association will approve affiliates and local districts and grant them authority as permitted by KRTA Constitution and By-Laws.

ARTICLE VI. AMENDMENTS

1. Amendments can be made by majority vote of the Delegate Assembly provided that the proposed amendment shall have been published in print or electronically at least one month prior to the meeting of the Delegate Assembly.
2. If information is disseminated with less than 30 days, two thirds vote of the Delegate Assembly is required.

ARTICLE VII. ADOPTION AND EFFECTIVE DATE

Upon adoption, the constitution shall become effective immediately.

**By-Laws of the
Kentucky Retired Teachers Association**

ARTICLE I. OFFICERS

Section A. The Executive Board of the Association shall consist of the following officers: President, President-Elect, Vice-President, and Immediate Past-President.

Section B. Duties of the Officers.

1. The President

a. The President shall be the executive officer of the Association and of the Executive Council. The term of office shall be for (1) year beginning July 1 and ending June 30 each year after the annual convention.

b. The President shall carry out rules and regulations and policies as set forth by the Executive Council and the association as well as perform the duties prescribed by the Constitution.

c. The President shall make an annual report to the Delegate Assembly.

2. The President-Elect

a. The President-Elect shall serve as President if for any reason the President is unable to serve.

b. The President-Elect shall automatically succeed and be deemed elected without convention vote, to the office of President.

c. The President-Elect shall keep in contact with the district chairpersons giving help whenever possible.

d. The President-Elect shall assist in formulating programs for the meetings and workshops and perform any other duties which the President or Executive Council may designate.

3. The Vice-President

a. The Vice-President shall serve as President in the absence of the President and President-Elect.

b. The Vice-President shall assist the President at such functions and times as requested by the President or Executive Council.

c. The Vice President shall automatically succeed and be deemed elected without convention vote, to the office of President Elect.

4. The Immediate Past-President

a. Shall serve on the Executive Council.

b. Shall be a member of the Executive Board for one year after serving as President.

ARTICLE II. EXECUTIVE COUNCIL

1. The Executive Council, hereafter referred to as the Council, shall consist of:

a. The Executive Board consisting of the President, President-Elect, Vice-President, and the Immediate Past-President. The Executive Board shall act for the Association between meetings of the Council and in addition shall have sole responsibility for any matter expressly delegated to it by the Delegate Assembly or Council

b. Fourteen members to be elected at the District fall meeting for a term of two years (or until a successor has been duly elected), to take office on July 1 following the meeting at which they were elected. Council members shall be elected in the following manner: The First, Third, Fifth, Central Kentucky East, Upper Kentucky

- River, Northern Kentucky, Big Sandy, and Central Kentucky West shall elect members for terms beginning in odd number years. The Second, Fourth, Louisville & Jefferson County, Middle Cumberland Upper Cumberland and Eastern Kentucky shall elect Council members for terms beginning in even number years. Council members may serve in succession for no more than two full terms.
- c. The Executive Council nominees must be voted in by the District they represent and cannot hold any other paid or volunteer state level position.
 - d. All elected members of the Council shall each have full voting privileges.
2. The Council shall act for the Association ad interim. The President shall be chairperson of the Council and the Executive Director or designee shall serve as Secretary of said Council. The Council shall meet on the call of the chairperson or written petition to the chairperson signed by a majority of the Council members. A majority of the Council present at a meeting shall constitute a quorum for transacting business.
 3. The Executive Council shall hold a minimum of two meetings per fiscal year. Meetings can be virtual or in person.
 4. The Executive Council shall adopt rules and regulations for conducting its meeting and performing its functions in conducting the business of the Association.
 5. In case of a vacancy, the District with the vacancy, will elect a member to fill the vacancy for the remainder of the term.
 6. The Executive Council shall have the authority to employ and prescribe the duties of an Executive Director. Other staff members may be employed by the Council upon the recommendation of the Executive Director.
 - a. The Executive Director
 - (1). The Executive Director shall be the Administrative officer of KRTA.
 - (2). The Executive Director or designee shall take the minutes of the KRTA Delegate Assembly and the Executive Council and submit a copy to all parties concerned as soon as possible.
 - (3). The Executive Director or designee shall keep on file in the KRTA office all minutes, communications, and committee reports.
 - (4). The Executive Director or designee shall serve as the Editor of the KRTA Newsletter.
 - (5). The Executive Director shall be evaluated annually by the Executive Council.
 - (6). The Executive Director shall present an annual budget and be responsible to see that an annual audit is performed.

ARTICLE III. AFFILIATES

Section A. District Associations shall be approved by a majority vote of the members of the Executive Council.

Section B. Governance Affiliates

1. The District Associations shall be organized by counties as follows:
 - a. First District: Ballard, Caldwell, Calloway, Carlisle, Crittenden, Fulton, Graves, Hickman, Livingston, Lyon, Paducah/McCracken, Marshall, and Trigg.
 - b. Second District: Christian, Owensboro/Daviess/McLean, Hancock, Henderson, Hopkins, Union and Webster.
 - c. Third District: Allen, Barren, Butler, Cumberland, Edmonson, Logan, Metcalfe, Monroe, Muhlenberg, Ohio, Simpson, Todd, and Warren.
 - d. Fourth District: Breckinridge, Grayson, Green, Elizabethtown/Hardin/LaRue, Hart, Marion, Meade, Nelson, Taylor, and Washington.

- e. Fifth District: Bullitt, Carroll, Franklin (Capital City), Henry, Oldham, Owen, Shelby, Spencer and Trimble.
- f. Louisville and Jefferson County
 - g. Central Kentucky West: Scott, Harrison, Woodford, Fayette/Bourbon (Bluegrass), Jessamine, Anderson, Mercer, Clark, Nicholas/Robertson and Boyle.
- h. Central Kentucky East: Madison, Garrard, Lincoln, Jackson, Lee, Estill, Powell, Rockcastle, EKV, and Montgomery.
- i. Eastern District: Boyd, Carter, Elliott, Rowan, Menifee, Bath, Fleming, Lewis, Mason, Greenup, and Morgan.
- j. Big Sandy District: Lawrence, Magoffin, Johnson, Martin, Floyd, and Pike.
- k. Middle Cumberland District: Adair, Casey, Clinton, McCreary, Pulaski, Russell, and Wayne.
- l. Northern District: Boone, Bracken, Campbell, Gallatin, Grant, Kenton, and Pendleton.
- m. Upper Cumberland District: Bell County/Pineville, Middlesboro Independent, Clay, Harlan, Knox, Laurel and Whitley.
 - n. Upper Kentucky River District: Breathitt, Knott, Leslie, Letcher, Owsley, Perry, and Wolfe.

ARTICLE IV. DELEGATE ASSEMBLY

1. The Delegate Assembly shall consist of the following:
 - a. Members of the Executive Council.
 - b. Local Association Delegates: At least one delegate for the first 50 members or any fraction thereof plus one additional delegate for each additional 50 members or major fraction thereof. No local association shall be entitled to more than 10 delegates.
2. Local Association Delegates must be a dues-paying member of the Association.
3. The local presidents of the local associations shall transmit to the KRTA Executive Director the names of the qualified delegates, not later than March 10 of each year.
4. The powers of the Delegate Assembly shall consist of the following:
 - a. Approve the Vice President nominee
 - b. Approve Legislative Agenda
 - c. Receive reports from Executive Director, Standing Committees, and Special Reports
 - d. Vote on recommended amendments to the constitution and bylaws
 - e. Receive annual budget and audit report
 - f. Vote on actions referred from the Executive Council
 - g. If the Delegate Assembly is unable to meet in person, the Executive Board will prepare a plan to complete the objectives and the voting process of the convention.

ARTICLE V. DUES

The annual membership dues of the Association shall be approved by the Delegate Assembly as recommended by the Executive Council.

ARTICLE VI. VICE PRESIDENT NOMINATION

1. The District will elect a Vice-President nominee using the KRTA Presidential Rotation, by December 15 prior to the Delegate Assembly.
2. On or before December 15, before the annual convention, the President shall

appoint an interview Committee of five Past Presidents, not more than two from the Executive Council. This committee will meet with the District’s nominee to discuss the duties of KRTA officers and present the nominee to the Delegate Assembly.

3. If the District has not submitted a nominee, then the rotation continues.

4. The President shall present the Vice-President nominee to the Delegate Assembly.

5. The newly elected officer shall take office July 1 following the annual meeting.

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

ARTICLE VII. COMMITTEES

1. Standing Committee Members are elected by Districts. Chairs and Co-Chairs of committees are appointed by the Executive Director and approved by the Executive Council. No person can be a member of more than one state committee.

The 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

2025-2026 KRTA OFFICERS

PRESIDENT

Ann Porter
(606) 584-2510
annsporter42@gmail.com

PRESIDENT ELECT

Charlotte Benton
(270) 564-4469
cab@brtc.net

VICE PRESIDENT

Meg Judd
(606) 521-6546
meg.judd@icloud.com

IMMEDIATE PP

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

KRTA EXECUTIVE DIRECTOR

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

EXECUTIVE COUNCIL

Debby Murrell

(5th District)
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Tara Parker

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Joann McCaughan

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Robert "Tate" Adams

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Ramona Jeffries

(4th District)
(270) 369-8328
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Beverly Martin

(Big Sandy)
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Arthur Green

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agreen51@bellsouth.net

Vivian Carter

(Upper KY River)
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Barbara Barr

(2nd District)
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Ellie Thompson

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Maggie Napier

(Upper Cumberland)
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Sandy Anderson

(1st District)
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Fred Tilsley

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Tishana Cundiff

(Middle Cumberland)
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tishana333@yahoo.com

AARP/KRTA Specialist

Tim Abrams
(502) 706-1672
dtim.abrams@gmail.com

**KENTUCKY RETIRED TEACHERS ASSOCIATION
DISTRICT PRESIDENTS
2025-2026**

FIRST

Charlotte Benton
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Kevil, KY 42053
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cab@brtc.net

SECOND

Susan Weatherford
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THIRD

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270-319-2065
cecilia.stephens@mediacombb.net

FOURTH

Shelia Wilkinson
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FIFTH

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JEFFERSON COUNTY

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CENTRAL KY EAST

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CENTRAL KY WEST

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UPPER CUMBERLAND

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Paula Adams
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UPPER KY RIVER

Karen Griffith
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BIG SANDY

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shaynewicker@yahoo.com

EASTERN

Ann Porter
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KRTA OFFICE MEMBERSHIP PROCEDURES

JUNE

Last 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.

A letter with a Cash and ADD form is mailed to all nonmember retirees

JULY

Mid-July—A reminder email will be sent as a follow up to all nonmember retirees soliciting their membership/renewal.

AUGUST

First Week of August—A second letter/email will be sent to all nonmember retirees soliciting their membership.

EACH MONTH

All new retirees, deceased retirees, and address changes are received from TRS and imported to the KRTA database.

This is always one month behind. An example is as follows; July retirees and changes are not downloaded to KRTA until August.

November, December, and January retirees/deaths are not imported until after the Martin Luther King Holiday. (Cut off for Convention Awards)

New retiree list is checked against ADD cards on hold and those with cards on file are made active and sent a Permanent Membership Card along with information on KRTA endorsed programs.

Letter with a membership brochure are sent to all other new retirees congratulating them and soliciting their membership.

Upon request labels for new retirees are sent to local presidents in county of their residence suggesting the president contact them and solicit their membership in their 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. The office does do a mass removal of those several times a year.

Membership lists are titled member and nonmember. This includes their name, address, email, and payment type.

DAILY

Memberships are received and processed daily. A membership card and Membership Enhancement Sheet (green sheet) are mailed to the new member.

AS REQUESTED

Updated county lists and/or mailing labels for members and nonmembers. 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.

Other documents can be mailed—such as KRTA brochure, Membership Enhancement Sheet (green sheet), and Legislative Program (blue sheet).

County lists can be reviewed for correction by calling the KRTA office at 1-800-551-7979.

Retirees are placed in the county they live, not the county they retired from. An active member can request their membership be moved to another county.

A nonmember can be removed from our database at any time by calling the KRTA office to request no solicitation.

KR TA Membership Awards

During the KRTA State Spring Convention, districts and locals are recognized for their achievements and volunteer activities. Certificates and awards are presented and should be placed into the district or local binder.

Local and District Recognition Programs

Gold, Silver, and Bronze Awards

Gold Seal = 425 Points Silver Seal= 375 Points Bronze Seal - 325 Points

Award Points are based upon the following criteria:

- Membership increases and percentage of potential members
- Number of meetings held and the topics of those meetings
- Contact with new retirees and honoring them at a meeting
- Participation in the state convention
- Contact with local legislators concerning current issues
- Contribution to the community i.e.: nursing homes, assisted living facilities, schools, hospitals, churches, and prisons.
- Contribution of \$40 or more to the N.O. Kimbler Scholarship Fund and also contribution of \$40 or more to the Bourgard Fund
- Local standing committees for Health & Insurance, Legislation, and Membership
- Local membership numbers

M. L. Archer Award

Mr. Archer served as State Membership Committee Chair for 12 years. In recognition of his contribution to KRTA, and its growth, the M. L. Archer Award was established. This award is presented to top local associations whose membership is at least 90%.

Virginia Shaw Award

Mrs. Virginia Shaw served as State Membership Committee Chair for 17 years. In honor of Mrs. Shaw and her work with KR TA membership, the Virginia Shaw Award is presented to Districts reaching the goal of 80%.

Yes, We Did Award-

Meeting the goal set by the Membership Committee

Top Hat Award

Top 10 locals and 5 districts for the largest membership percentage increase since previous year

Hop To It Award

Presented to the local member who puts KRTA over the KRTA membership goal, with both local and district being recognized for the achievement.

2025-2026 Tentative Events Calendar

Executive Council Meetings:

- August 18, 2025 – KRTA Office
- December 8, 2025 -KRTA Office
- April 20, 2026 – Holiday Inn East, Louisville, KY
- June 8, 2026 – KRTA Office

Health & Insurance Committee Meeting:

- October 13, 2025 – KRTA Office

Legislative Committee Meetings:

- July 14, 2025 – KRTA Office
- November 10, 2025 – KRTA Office

Membership & Pre-Retirement Committee Meeting:

- July 21, 2025 – KRTA Office

KRTA Convention:

- April 20 & 21, 2026 – Holiday Inn East, Louisville, KY

District Presidents Meetings:

- July 28, 2025 – KRTA Office
- April 20, 2026 – KRTA Convention

2025-26 Membership Campaign: Final membership report printed on MLK Day 2026

Retired Teachers Appreciation Week- October 20-26, 2025

KRTA Local and District Recognition Forms:

- March 15, 2026 – Due to KRTA Office

Volunteer Hours:

- March 15, 2026 – (Jan 1-Dec 31) – Report hours on Local Recognition Form

School Supply Drive/ Feed KY Program: Application for \$50 matching grant will be mailed to local presidents

- March 15, 2026 – Report number of bags of school supplies contributed on Local Recognition Form
- March 15, 2026 – Report number of food items contributed on Local Recognition Form

Frank R Hatfield Volunteer of the Year Award:

- February 3, 2026 - Local Presidents submit candidate to District Presidents
- March 15, 2026 - District Presidents submit candidate to KRTA State Office
- April 21, 2026 - State Award Winner Announced

KRTA/AARP Grandparent Essay Contest:

- School Winner Dec 15, 2025
- County Winner Jan 31, 2026
- District Winner March 1, 2026
- State Winner announced at 2026 State Convention

2025-26 KRTA NEWS – Print Dates:

- July 2025 Issue – Submission Deadline May 17, 2025
- November 2025 Issue – Submission Deadline September 15, 2025
- March 2026 Issue – Submission Deadline January 24, 2026

2025-2026 KRTA NEWS EXPRESS (Electronic Newsletter) – Release Dates:

- September 2025
- May 2026

2025-2026 Tentative Events Calendar

July 14, 2025-Legislative Meeting: KRTA Office

July 21, 2025-Membership Meeting: KRTA Office

July 28, 2025-District Presidents Meeting: KRTA Office

August

August 18, 2025- Executive Council Meeting: KRTA Office

September

October

October 13, 2025, Health & Insurance Committee Meeting: KRTA Office

October 20-26, 2025 - Retired Teachers Appreciation Week

November

November 10, 2025-Legislative Committee Meeting: KRTA Office

December

December 8, 2025-Executive Council Meeting: KRTA Office

December 15, 2025- School Winners for Grandparents Essay due

January

January 19, 2026-2025-26 Membership Campaign: Final membership report printed on MLK Day 2026

January 31, 2026-County Winners for Grandparents Essay due

February

February 3, 2026-Local Presidents submit candidate to District Presidents for Frank R. Hatfield Volunteer of the Year award

March

March 1, 2026-District Winner for Grandparents Essay due

March 15, 2026- Local Recognition forms due to state office; District Presidents submit candidate for Frank R. Hatfield Volunteer of the Year award to state office

April

April 20-21, 2026-KRTA Convention: Holiday Inn East, Louisville

April 20, 2026-Executive Council/District Presidents Joint Meeting: Holiday Inn East, Louisville

Grandparents Essay Winner and Frank R. Hatfield Volunteer of the Year Award announced at Convention

June

June 8, 2026- Executive Council Meeting- KRTA Office



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

Greg Roush, Executive Director

Emily Carey, Operations

Brenda Meredith, KRTA News

Alma Wooley, Member Services



@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 two 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** 1-502-287-1005 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
- **Dental and Vision Plans**
Jason Weilage JSW Agency (502) 500-9623 jweilage@jswagency.com www.krtadentalandvision.com
 - Delta Dental/VSP Vision Enroll Anytime
Three plans available
Provider & Billing Qts 1-800-955-2030
 - Avesis Vision Plans Enroll Sept-Oct.
Low and High Options Available
Provider Questions Avesis 1-800-828-9341
- **Commonwealth Credit Union** 1-800-228-6420 or www.ccukey.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** Christie Talley (270) 992-0176 talley.christie@ace.aaa.com
- **North American Life Plans** Jeff Johnson (502) 553-7630 or 1-888-362-1214 jjcraa@aol.com
 - Long-Term Care & Life Insurance
- **Stephen Foster Story:** Enjoy BOGO please call 1-800-626-1563
- **Kentucky State Parks:** Commonwealth Connection <https://parks.ky.gov/deals/state-employees>

- **Collette Travel:** 1-800-581-8942 For more information visit, <https://krta.org/collettetravel/>
 - #1319642 Discover Hawaiian Adventure, Feb. 12 - Feb. 21, 2026 Expires August 12, 2025
 - #1319634 British Landscapes, May 21, - May 30, 2026 Expires November 22, 2025
 - #1319625 Canadian Rockies & Glacier National Park August 16 - August 22, 2026
 - #1319628 New York City Holiday, December 7 - December 11, 2026 Expires June 7, 2026
- **Heuser Hearing institute:** (502) 584-3573 or www.thehearinginstitute.org
 - No charge exam and consultation
 - Members discounts
- **Comfort Keepers:** (606) 676-9888 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:** 1-888-343-0182 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

TRS (MEHP) 65 and over or Medicare Eligible

United Healthcare Group Advantage (PPO) 1-844-518-5877	www.trs.ky.gov/retired-members/age-65-over/
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	
Renew Rewards 1-888-219-4602	
Virtual Doctor 1-855-615-8335	
United Healthcare Hearing 1-866-445-2071	www.UHChearing.com/Retiree
Personal Emergency Device 1-855-595-8485	www.lifeline.com/uhcgroup/
Roots Food Group 1-888-322-2305	www.rootsfoodgroup.com/

TRS (KEHP) 65 and under NOT Medicare Eligible

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 1-866-832-2436	www.smartshopper.com
Living Well Promise 1-800-681-6758 (CastLight)	www.mycastlight.com/mybenefits
Turning 65 Soon? 1-800-618-1687	www.trs.ky.gov/retired-members/turning-65/

JOIN KRTA

Why Join;

- The only organization in KY whose sole purpose is the welfare of retired teachers
- Promote the economic and social interests of retired teachers
- Take advantage of the many discounts
- To aid and support worthy legislation
- Act on behalf of retired teachers
- Larger voice in Frankfort
- Community involvement
- Comradery amongst other retirees

How to Join;

- Cash Enrollment - Receive a notice to renew every June. Open to active, retired, and associate members
- Auto Dues Deduction (ADD)- \$20 will be deducted every year from your November annuity payment. Only open to those who are a TRS retiree and receiving a monthly TRS payment.

SCAN TO ESIGN YOUR AUTOMATIC DUES DEDUCTION NOW!

