



DISTRICT PRESIDENT/EXECUTIVE  
COUNCIL  
HANDBOOK  
*2026-2027*

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## **2026-2027 Tentative Events Calendar**

### **Executive Council Meetings:**

- August 17, 2026 – KRTA Office
- December 7, 2026 -KRTA Office
- April 19, 2027 – Holiday Inn East, Louisville, KY
- June 7, 2027 – KRTA Office

### **Health & Insurance Committee Meeting:**

- October 12, 2026 – KRTA Office

### **Legislative Committee Meetings:**

- July 13, 2026 – KRTA Office
- November 16, 2026 – KRTA Office

### **Membership & Pre-Retirement Committee Meeting:**

- July 20, 2026 – KRTA Office

### **KRTA Convention:**

- April 19 & 20, 2027 – Holiday Inn East, Louisville, KY

### **District Presidents Meetings:**

- July 27, 2026 – KRTA Office
- April 19, 2027 – KRTA Convention

**2026-27 Membership Campaign: Final membership report printed on MLK Day January 18, 2027**

**Retired Teachers Appreciation Week- October 19-23, 2026**

### **KRTA Local and District Recognition Forms:**

- March 15, 2027 – Due to the KRTA Office

### **Volunteer Hours:**

- March 15, 2027 – (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, 2027 – Report the number of bags of school supplies contributed on the Local Recognition Form
- March 15, 2027 – Report the number of food items contributed on the Local Recognition Form

### **Frank R Hatfield Volunteer of the Year Award:**

- February 3, 2027 - Local Presidents submit candidates to District Presidents
- March 15, 2027 - District Presidents submit candidates to the KRTA State Office
- April 20, 2027 - State Award Winner Announced

### **KRTA/AARP Grand-parent Essay Contest :**

- School Winner Dec 15, 2027
- County Winner Jan 31, 2027
- District Winner March 1, 2027
- State Winner announced at 2027 State Convention

### **2026-27 KRTA NEWS – Print Dates:**

- July 2026 Issue – Submission Deadline May 17, 2026
- November 2026 Issue – Submission Deadline September 15, 2026
- March 2027 Issue – Submission Deadline January 24, 2027

### **2026-27 KRTA NEWS EXPRESS (Electronic Newsletter) – Release Dates:**

- September 2026
- May 2027

## KRTA DISTRICT PRESIDENT'S RESPONSIBILITIES

- I. Conduct five (5) District meetings annually involving the District's Executive Council and State Committee members. Others involved in these meetings should be District and Local RTA Officers and committee chairpersons (preferably).

### Meeting Schedule:

District Planning Meeting -After summer District Presidents meeting, but prior to the District's KRTA Fall Workshop. Participants should be: District Officers, Executive Council Member, State Committee Members, and Local Presidents. (Focus-Review Local President's Handbook and plan District's activities for the year)

1st District Meeting- The same day as the district's KRTA Fall Workshop. {Focus-Organizational)

2nd District Meeting- After Fall Workshop, but prior to November 1. (Focus-Leadership Training)

3rd District Meeting- After December Executive Council Meeting. (Focus-General Session)

4th District Meeting- After January 1, but prior to Annual KRTA Convention. (Focus-General Session)

5th District Meeting- After annual KRTA Convention, but prior to June.30. {Focus-General Session)

In addition to reporting on Executive Council activities, these meetings should include District activity in the following areas:

- MEMBERSHIP: Plan promotional activities for local, district and state membership drives.
- LEGISLATIVE: Canvas membership and collect information for the State Legislative Program and/or review new legislation.
- HEALTH & INSURANCE: Secure, review and distribute information pertaining to health and insurance.

NOTE: The following items should also be completed at the appropriate meeting:

- Make District Committee Assignments
- Prepare District Budget
- Elect District Officers (Report to KRTA Office by May 15)
- Elect KRTA Council Member (Report to KRTA Office by May 15)
- Make KRTA Standing Committee Recommendations (Report to KRTA office by May 15)

- II. Serve or appoint a contact person for the Fall Workshop to assist KRTA in arranging the meeting place and meal. Welcome and introduce the program at the Fall Workshop. Promote attendance at the Fall Workshop:
- III. Receive and distribute information during sessions of the General Assembly and serve as a telephone contact for the District with KRTA's volunteer advocates.
- IV. Arrange for the completion of the District Association Recognition Program form and mail to the KRTA office by March 15.

## **DISTRICT ASSOCIATION LEADERSHIP MEETINGS PROCEDURES**

1. The District President and Executive Council member will set the meeting dates at the annual District Planning meeting.
2. The District President will notify the Local Association Presidents of the meeting date and ask that five people, preferably the President, President Elect and three Committee Chairpersons attend.
3. The District President will arrange for lunch in conjunction with the meeting.
4. Payment for the meal will be made by the District.
5. The District President or Treasurer will submit the Reimbursement Form to the KRTA office showing District name, date of the meeting, name of each Local Association represented, and names and office held up to five persons who attended from each Local. Maximum four meetings per year.

It is anticipated that the District will pay the meal cost in excess of \$16.00 per person and that the Local or District Association will pay mileage to the meetings for one automobile per Local.

The meeting agenda should include a review of the reports and items of the business from the Executive Council meeting and any additional reports and/or other issues which need to be brought to the attention of the leaders in the Local Associations

# DISTRICT ASSOCIATION LEADERSHIP MEETING

## REIMBURSEMENT

\_\_\_\_\_

DISTRICT ASSOCIATION

## REQUEST

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

MEETING DATE

### LOCAL ASSOCIATION

NAME

OFFICE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

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### LOCAL ASSOCIATION

NAME

OFFICE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

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### LOCAL ASSOCIATION

NAME

OFFICE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### LOCAL ASSOCIATION

NAME

OFFICE

1. \_\_\_\_\_
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3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### LOCAL ASSOCIATION

NAME

OFFICE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### LOCAL ASSOCIATION

NAME

OFFICE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**LOCAL ASSOCIATION**NAMEOFFICE

1. \_\_\_\_\_
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**LOCAL ASSOCIATION**NAMEOFFICE

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**LOCAL ASSOCIATION**NAMEOFFICE

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**LOCAL ASSOCIATION**NAMEOFFICE

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**LOCAL ASSOCIATION**NAMEOFFICE

1. \_\_\_\_\_
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3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**LOCAL ASSOCIATION**NAMEOFFICE

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**AMOUNT DUE TO DISTRICT**

\$ 16.00 x \_\_\_\_\_ = \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**TOTAL ATTENDING****REIMBURSEMENT DUE****DATE**

Please return reimbursement check to the following person:

\_\_\_\_\_ / \_\_\_\_\_

**NAME****STREET & NUMBER OR BOX & ROUTE**

\_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**CITY****STATE****ZIP CODE**

\_\_\_\_\_ ( \_\_\_\_\_ ) \_\_\_\_\_

**District President's Signature****Phone Number**

This form should be submitted to KRTA (7800 Leaders Lane Louisville KY 40291) to request reimbursement for a maximum of five (5) persons from each local association attending the District Leadership Meeting held following the KRTA Executive Council Meeting—maximum four (4) meetings per year. The local president, president-elect, and chairpersons of the Membership, Health & Insurance and Legislative Committees should attend the District Leadership Meetings.

## DISTRICT ASSOCIATION RECOGNITION PROGRAM

---

District Name

### PURPOSE:

The purposes of this program are two-fold:

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

### PROCEDURE:

The District Association President should complete the following rating scale by filling in the appropriate number of points for each item based on his/her Association's activity.

\*The completed form must be returned to the KRTA office by March 15.

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

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

### CRITERIA:

1. \* District Members \_\_\_\_\_ (Number of district dues paying members in your district RTA)  
(KRTA Office will calculate points based on district membership, growth and state Membership)
2. Holds 4 district Leadership meetings annually following Executive Council meetings  
45 points \_\_\_\_\_
3. Makes a contribution of \$50 to N.O. Kimbler Scholarship Program  
20 points \_\_\_\_\_
4. Makes a contribution of \$50 to the Bourgard Foundation  
20 points \_\_\_\_\_
5. Makes a contribution of \$100 or more to both the Kimbler Scholarship Fund and Bourgard Funds  
10 points \_\_\_\_\_

- |                                                                                                                                                                                                                                                                          |           |       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------|
| 6. Achieved assigned membership percentage goals. "Yes, We Did Award"                                                                                                                                                                                                    | 10 points | _____ |
| 7. Achieved greatest gain in members. "Top Hat Award"                                                                                                                                                                                                                    | 10 points | _____ |
| 8. Submits District Volunteer of the Year Candidate                                                                                                                                                                                                                      | 40 points | _____ |
| 9. A total of at least 5 officers and/or committee chairs attend the Fall Workshop.                                                                                                                                                                                      | 45 points | _____ |
| 10. Officers are elected for two-year terms prior to July 1 of the year they are to begin serving and notice is sent to the KRTA office. (If the District has a President Elect or Vice-President who automatically becomes President, a two-year term is not required). | 40 points | _____ |
| 11. The District President attends the annual Presidents' meeting held in July and the State Convention held in April.                                                                                                                                                   | 45 points | _____ |
| 12. Maintains active committees and/or chairpersons in the following areas:<br>Health & Insurance, Legislation, Membership/Pre-Retirement:                                                                                                                               | 45 points | _____ |
| 13. Makes periodic contacts with local legislators and/or Congressional delegation concerning current issues.                                                                                                                                                            | 45 points | _____ |

\_\_\_\_\_

District Association

\_\_\_\_\_

Date

\_\_\_\_\_

President

\* Required

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

**FIRST**

Charlotte Benton  
3705 Apperson Rd  
Kevil, KY 42053  
270.462.3406/270.564-4469  
[cab@brtc.net](mailto:cab@brtc.net)

**SECOND**

Susan Weatherford  
1290 College Dr  
Madisonville, KY  
270.836.7641  
[shweatherford@bellsouth.net](mailto:shweatherford@bellsouth.net)

**THIRD**

Cecilia Stephenson  
1301 Burns Rd  
Tompkinsville KY 42167  
270-319-2065  
[cecilia.stephens@mediacombb.net](mailto:cecilia.stephens@mediacombb.net)

**FOURTH**

Mona Mattingly  
2086 Grayson Springs Rd  
Leitchfield, Ky 42754  
270-540-1183  
[monahigdon@gmail.com](mailto:monahigdon@gmail.com)

**FIFTH**

Dawn Scroggins  
60 Monroe Ln  
Campbellsburg, KY 40011  
502.347.5587  
[Dawn.bayerscroggins@gmail.com](mailto:Dawn.bayerscroggins@gmail.com)

**JEFFERSON COUNTY**

Vicki Lete  
1016 Falcon Ct  
New Albany, IN 47150  
812-944-2633  
[Vicki.lete@yahoo.com](mailto:Vicki.lete@yahoo.com)

**CENTRAL KY EAST**

Janis Barton  
1084 Amberley Way  
Richmond, Ky 40475  
606-246-2313  
[eddiejanisbarton@yahoo.com](mailto:eddiejanisbarton@yahoo.com)

**CENTRAL KY WEST**

|                                                                                                                                                          |                                                                                                                                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Lisa Petrey-Kirk<br>5001 Chaplin Rd<br>Willisburg, KY 40078<br>502.680.0740/859.375.5001<br><a href="mailto:lisakaypk@gmail.com">lisakaypk@gmail.com</a> | Karen Guffey<br>917 Amanda Court<br>Lexington, KY 40515<br>859.537.7460<br><a href="mailto:karlyssa@aol.com">karlyssa@aol.com</a> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|

**MIDDLE CUMBERLAND**

Bobbi Templet  
485 Rocky Point Rd  
Bronston, Ky 42518  
502-905-8666  
[bobbi.templet@gmail.com](mailto:bobbi.templet@gmail.com)

**NORTHERN**

Brenda Montgomery  
174 Klee Rd  
Falmouth, KY 4104  
859-462-3805  
[brendamontgomery@zoomtown.com](mailto:brendamontgomery@zoomtown.com)

**UPPER CUMBERLAND**

|                                                                                                                                                    |                                                                                                                                                             |
|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sherry Skaggs<br>340 Greers Chapel Road<br>Harrogate, TN 37752<br>423.869.8496<br><a href="mailto:sskagss56@outlook.com">sskagss56@outlook.com</a> | Paula Adams<br>PO BOX 485<br>Middlesboro, KY 40965<br>606.248.4486/606.499.1392<br><a href="mailto:paula.adams1951@yahoo.com">paula.adams1951@yahoo.com</a> |
|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|

**UPPER KY RIVER**

Karen Griffith  
20 Twin Cedar Road  
Jackson, KY 41339  
606.295.9211/606.568.0113  
[kayseegee@yahoo.com](mailto:kayseegee@yahoo.com)

**BIG SANDY**

Bernard Wicker  
7641 Highway 550 E  
Garner KY 41817  
606.946.2208  
[shaynewicker@yahoo.com](mailto:shaynewicker@yahoo.com)

**EASTERN**

Ann Porter  
PO BOX 88  
Washington, KY 41096  
606.584.2510  
[annporter42@gmail.com](mailto:annporter42@gmail.com)

**FRANK R. HATFIELD**  
**VOLUNTEER OF THE YEAR AWARD**

❖ Established in 2009

❖ Criteria:

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

❖ Timeframe:

At a minimum, the one volunteer activity should encompass Jan 1 – Dec 31 of the current year. The one volunteer activity, however, could be since retirement or a lifetime.

❖ Submission Deadlines:

- Local RTA – submits name of candidate and a one-page (maximum) document describing the one volunteer activity to the District President by February 3, 2026 in the one-page document report what the volunteer did for the good of others. Also, “show” how the one volunteer activity is unique by describing the way in which the recipient(s) benefitted from the efforts of the volunteer.
- District President establishes a district level committee to review and select a district winner.
- District President submits the district winner’s name and supporting document to the KRTA Office by March 15, 2026.

KRTA Officer in charge of program convenes an Ad Hoc committee to select state winner.



**DISTRICT OFFICER FORM**

**DISTRICT:** \_\_\_\_\_ **YEAR:** \_\_\_\_\_

**DISTRICT PRESIDENT:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DISTRICT V. PRESIDENT:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**EXECUTIVE COUNCIL:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DISTRICT TREASURER:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DISTRICT MEMBERSHIP:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DISTRICT LEGISLATIVE:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DISTRICT HEALTH & INS:**

PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL: \_\_\_\_\_

## EXECUTIVE COUNCIL

**2026-2027**

| First Name | Last Name | Address 1            | City          | State | Zip Code | Home Phone     | KRTA District | Email                       |
|------------|-----------|----------------------|---------------|-------|----------|----------------|---------------|-----------------------------|
| SANDRA     | ANDERSON  | 2163 PEELER RD       | DEXTER        | KY    | 42036    | (270) 978-2574 | 1             | seanderson@bellsouth.net    |
| BARBARA    | BARR      | 3813 MELODY LN       | HENDERSON     | KY    | 42420    | (606) 309-7991 | 2             | BJBARR60@GMAIL.COM          |
| ARTHUR     | GREEN     | PO BOX 314           | ELKTON        | KY    | 42220    | (270) 878-0137 | 3             | AGREEN51@BELLSOUTH.NET      |
| RAMONA     | JEFFRIES  | 670 JEFFRIES RD      | ELIZABETHTOWN | KY    | 42701    | (270) 763-2290 | 4             | CRJEFF44@WINDSTREAM.NET     |
| DEBORAH    | MURRELL   | 2805 ALICE AVE       | LOUISVILLE    | KY    | 40220    | (502) 387-7472 | 5             | dasailboat@msn.com          |
| BEVERLY    | MARTIN    | 107 DINGUS BTM       | MARTIN        | KY    | 41649    | (606) 831-5344 | BS            | bmartin@ovp.healthcare      |
| FREDERICK  | TILSLEY   | PO BOX 331           | BEREA         | KY    | 40403    | (859) 200-2708 | CKE           | ftilsley55@gmail.com        |
| ELEANORE   | THOMPSON  | 962 KENTONTOWN RD    | MOUNT OLIVET  | KY    | 41064    | (606) 584-1197 | CKW           | ELLIESLP2@GMAIL.COM         |
| ROBERT     | ADAMS     | PO BOX 919           | OWINGSVILLE   | KY    | 40360    | (606) 210-8283 | E             | robert.adams8181@gmail.com  |
| TARA       | PARKER    | 8403 OXFORD WOODS CT | LOUISVILLE    | KY    | 40222    | (502) 226-0219 | JEFF          | TAPA613@AOL.COM             |
| TISHANA    | CUNDIFF   | 11181 S KY 501       | LIBERTY       | KY    | 42539    | (606) 303-1132 | MC            | tishana333@yahoo.com        |
| JOANN      | MCCAUGHAN | 8463 VILLAGE DR      | FLORENCE      | KY    | 41042    | (859) 240-4119 | N             | joannmccaughan@gmail.com    |
| MAGGIE     | NAPIER    | 1770 N HIGHWAY 421   | MANCHESTER    | KY    | 40962    |                | UC            | maggiegardens3@gmail.com    |
| VIVIAN     | CARTER    | 101 PARKVIEW DR      | HAZARD        | KY    | 41701    | (606) 438-3586 | UK            | viviancombscarter@gmail.com |

# 2026-2027 KRTA OFFICERS

## **PRESIDENT**

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

## **PRESIDENT ELECT**

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

## **VICE PRESIDENT**

**Karen Delaney**  
(859) 462-0271  
mrskaren.delaney@gmail.com

## **IMMEDIATE PP**

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

## **KRTA EXECUTIVE DIRECTOR**

**Greg Roush**

(502) 231-5802  
greg.roush@krta.org

## **EXECUTIVE COUNCIL**

**Debby Murrell**  
(5th District)  
(502) 387-7472  
deborahmurrell83@gmail.com

**Susan Thurman**  
(Jefferson Co.)  
(502) 386-2555  
susan.thurman@outlook.com

**Joann McCaughan**  
(Northern)  
(859) 240-4119  
joannmccaughan@gmail.com

**Margaret Snedegar**  
(Eastern)  
(606) 776-8240  
margaretas@windstream.net

**Ramona Jeffries**  
(4th District)  
(270) 369-8328  
crjeff44@windstream.net

**Arthur Green**  
(3rd District)  
(270) 878-0137  
agreen51@bellsouth.net

**Barbara Barr**  
(2nd District)  
(270) 952-2966  
bjbarr60@gmail.com

**Greg Gierhart**  
(1st District)  
(270) 227-2141  
ggierhart@gmail.com

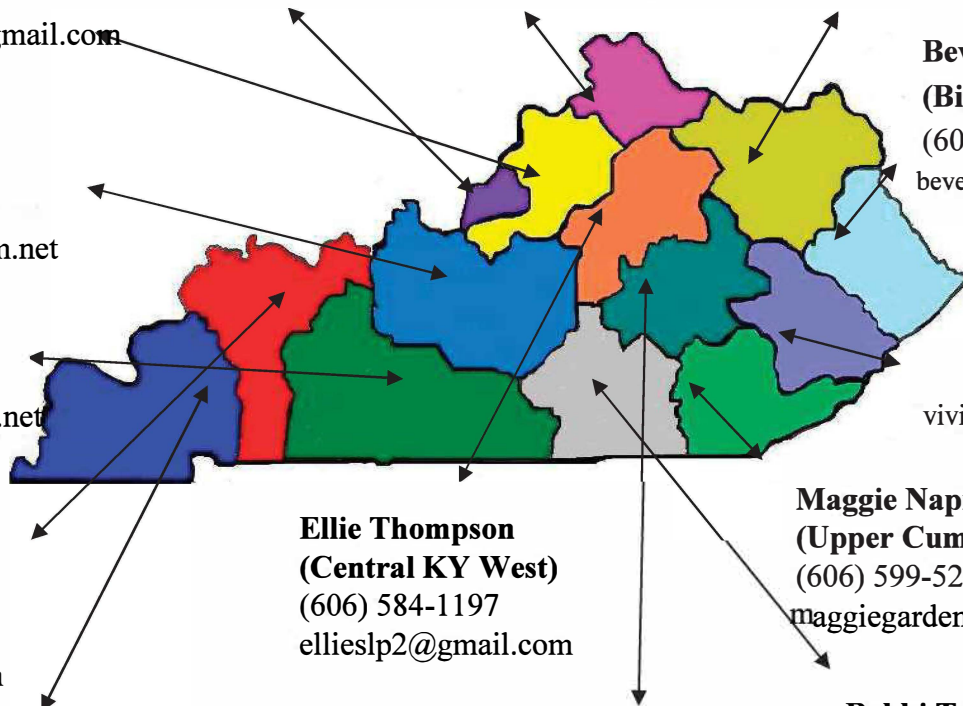
**Ellie Thompson**  
(Central KY West)  
(606) 584-1197  
ellieslp2@gmail.com

**Fred Tilsley**  
(Central KY East)  
(859) 200-2708  
ftilsley55@gmail.com

**Maggie Napier**  
(Upper Cumberland)  
(606) 599-5201  
maggiegardens3@gmail.com

**Bobbi Templet**  
(Middle Cumberland)  
(502) 905-8666  
bobbi.templet@gmail.com

**AARP/KRTA Specialist**  
Tim Abrams  
(502) 706-1672  
dtim.abrams@gmail.com



**KRTA  
EXECUTIVE COUNCIL  
MEETING DATES**

**2026-27**

|              |                                              |       |
|--------------|----------------------------------------------|-------|
| Monday<br>AM | August 17, 2026                              | 10:00 |
| Monday<br>AM | December 7, 2026                             | 10:00 |
| Monday<br>AM | April 19, 2027*<br>(Day Prior to Convention) | 10:00 |
| Monday<br>AM | June 7, 2027                                 | 10:00 |

Meetings will be held at the KRTA office, with the exception of the April meeting.

\*The April meeting will be held in conjunction with the annual convention and will be a joint meeting with KRTA District Presidents.

**FY2027 Tentative Budget.**

The revenue is contingent upon 30,000 members and all members above 30,000 will be budget contingency. With the increase of Membership Dues, we were unsure if we would maintain our current membership numbers. Revenue is also brought in with Sponsorships of the KRTA Convention, Fall Workshop Sponsorships, KRTA Convention Registration, Collette Travel Rebates.

Budget Overview: (FY2027 Tentative Budget Attached)

|                     |       |                                 |  | FY<br>2026 | FY<br>2027 |  | \$         | %       |
|---------------------|-------|---------------------------------|--|------------|------------|--|------------|---------|
| Account             |       |                                 |  | Budget     | Budget     |  | Change     | Change  |
| <b>Revenue</b>      |       |                                 |  |            |            |  |            |         |
| 001                 |       | MEMBERSHIP DUES                 |  | \$ 620,000 | \$ 750,000 |  | \$ 130,000 | 20.97%  |
| 002                 |       |                                 |  |            |            |  |            |         |
| 003                 |       | ANNUAL CONVENTION               |  |            |            |  |            |         |
|                     | 3001  | Door Prizes                     |  | -          |            |  |            |         |
|                     | 3002  | Convention Registration         |  | 8,500      | 8,500      |  | -          | 0.00%   |
|                     | 3003  | Convention Sponsors             |  | 5,500      | 5,500      |  | -          | 0.00%   |
| 003                 |       | TOTAL ANNUAL CONVENTION         |  | 14,000     | 14,000     |  | -          | 0.00%   |
| 004                 |       | OTHER                           |  |            |            |  |            |         |
|                     | 4001  | KRTA Pins                       |  | 100        | 100        |  | -          | 0.00%   |
|                     | 4002  | KRTA Mugs                       |  | -          |            |  | -          | 0.00%   |
|                     | 4003  | Collette Travel                 |  | 30,000     | 20,000     |  | (10,000)   |         |
|                     | 4004  | Mailing Supplies                |  | -          |            |  |            |         |
|                     | 4005  | Over Payments/Refunds           |  | -          |            |  | -          | 0.00%   |
|                     | 4007  | Telephone Rebate                |  | 1,500      | 1,500      |  | -          | 0.00%   |
|                     | 4009  | Miscellaneous                   |  |            |            |  | -          | 0.00%   |
|                     | 4010  | Grant Income                    |  |            |            |  |            |         |
|                     | 4011  | Fall Workshop Sponsors          |  | 2,000      | 2,000      |  | -          | 0.00%   |
| 004                 |       | TOTAL OTHER                     |  | 33,600.00  | 23,600.00  |  |            | -29.76% |
|                     |       |                                 |  |            |            |  |            |         |
|                     |       | TOTAL REVENUE                   |  | \$ 667,600 | \$ 787,600 |  |            | 17.97%  |
| <b>Expenditures</b> |       |                                 |  |            |            |  |            |         |
| 100                 |       | ANNUAL CONVENTION               |  |            |            |  |            |         |
|                     | 0101  | Luncheon                        |  | 16,750     | 19,000     |  | 2,250      | 0.00%   |
|                     | 0102  | Honorariums                     |  | 1,000      | 1,200      |  | 200        | 20.00%  |
|                     | 0103  | Opening Dinner                  |  | 16,750     | 18,000     |  | 1,250      | 7.46%   |
|                     | 0110  | Miscellaneous                   |  | 8,500      | 16,000     |  | 7,500      | 0.00%   |
| 100                 |       | TOTAL ANNUAL CONVENTION         |  | 43,000     | 54,200     |  | 11,200     | 26.05%  |
| 200                 |       | CONTRACT SERVICES & FEES        |  |            |            |  |            |         |
|                     | 0201  | Audits                          |  | 22,635     | 23,000     |  | 365        | 1.61%   |
|                     | 0202  | Bonds                           |  | 102        | 150        |  | 48         | 47.06%  |
|                     | 0203  | Insurance                       |  | 6,479      | 8,000      |  | 1,521      | 23.48%  |
|                     | 204-1 | KRTA News                       |  | 67,000     | 75,000     |  | 8,000      | 11.94%  |
|                     | 204-2 | Marketing                       |  | 43,290     | 45,000     |  | 1,710      | 3.95%   |
|                     | 0205  | Maintenance Agreements          |  | 23,000     | 24,000     |  | 1,000      | 4.35%   |
|                     | 0206  | Legaline                        |  | 20,000     | 20,000     |  | -          | -13.04% |
|                     | 0207  | Membership Recruitment          |  | 24,000     | 24,000     |  | -          | 20.00%  |
|                     | 0208  | Phone Payments                  |  | 500        | 600        |  | 100        |         |
| 200                 |       | TOTAL CONTRACT SERVICE & FEES   |  | 207,006    | 219,750    |  | 12,744     | 6.16%   |
| 300                 |       | COMMITTEES                      |  |            |            |  |            |         |
|                     | 0301  | Legislative                     |  | 38,519     | 39,000     |  | 481        | 1.25%   |
|                     | 0302  | Health & Insurance              |  | 6,500      | 6,500      |  | -          | 0.00%   |
|                     | 0303  | Membership & Pre-Retirement     |  | 6,500      | 6,500      |  | -          | 0.00%   |
|                     | 0304  | Other                           |  | 1,000      | 1,000      |  | -          | 0.00%   |
| 300                 |       | TOTAL COMMITTEES                |  | 52,519     | 53,000     |  | 481        | 0.92%   |
| 400                 |       | OFFICE EXPENSE                  |  |            |            |  |            |         |
|                     | 0401  | Printing                        |  | 4,000      | 4,000      |  | -          | 0.00%   |
|                     | 0402  | Postage                         |  | 8,000      | 8,000      |  | -          | 0.00%   |
|                     | 0403  | Equipment, Furniture & Software |  | 2,000      | 2,000      |  | -          | 0.00%   |
|                     | 0404  | Materials & Supplies            |  | 4,000      | 4,000      |  | -          | 0.00%   |
|                     | 0405  | Telephone                       |  | 5,800      | 5,800      |  | -          | 0.00%   |

|                                  |                                               |                   |                   |                   |                |
|----------------------------------|-----------------------------------------------|-------------------|-------------------|-------------------|----------------|
| 0406                             | Maintenance & Repairs                         | 11,000            | 12,000            | 1,000             | 9.09%          |
| 0407                             | Property Taxes & Licenses                     | 5,500             | 5,500             | -                 | 0.00%          |
| 0408                             | Sales & Use Tax                               | 25                | 25                | -                 | 0.00%          |
| 0409                             | Utilities                                     | 5,500             | 5,500             | -                 | 0.00%          |
| 0410                             | Miscellaneous                                 | 3,000             | 3,000             | -                 | 0.00%          |
| <b>400</b>                       | <b>TOTAL OFFICE EXPENSE</b>                   | <b>48,825</b>     | <b>49,825</b>     | <b>1,000</b>      | <b>2.05%</b>   |
| <b>500</b>                       | <b>DISTRICT EXPENSE</b>                       |                   |                   |                   |                |
| 0501                             | Appropriation                                 | 7,000             | 8,000             | 1,000             | 14.29%         |
| 0502                             | Fall Workshop - Food                          | 16,000            | 18,000            | 2,000             | 12.50%         |
| 0503                             | Fall Workshop - Travel                        | 28,000            | 30,000            | 2,000             | 7.14%          |
| 0504                             | Leadership Meetings                           | 17,000            | 17,000            | -                 | 0.00%          |
| 0505                             | District Presidents Travel                    | 7,367             | 7,367             | -                 | 0.00%          |
| 0506                             | New Retiree Recognition                       | 4,000             | 4,000             | -                 | 0.00%          |
| <b>500</b>                       | <b>TOTAL DISTRICT EXPENSE</b>                 | <b>79,367</b>     | <b>84,367</b>     | <b>5,000</b>      | <b>6.30%</b>   |
| <b>600</b>                       | <b>OFFICERS &amp; EXECUTIVE COUNCIL</b>       |                   |                   |                   |                |
| 0601                             | Officer Travel                                | 6,900             | 7,500             | 600               | 8.70%          |
| 0602                             | Executive Council Travel                      | 10,000            | 11,000            | 1,000             | 10.00%         |
|                                  | <b>TOTAL OFFICERS &amp; EXECUTIVE COUNCIL</b> | <b>16,900</b>     | <b>18,500</b>     | <b>1,600</b>      | <b>9.47%</b>   |
| <b>700</b>                       | <b>STAFF</b>                                  |                   |                   |                   |                |
| 0701                             | Executive Salaries                            | 85,527            | 87,800            | 2,273             | 2.66%          |
| 0702                             | Secretaries Salaries                          | 78,900            | 81,580            | 2,680             | 3.40%          |
| 0703                             | Fringe Benefits                               | -                 | -                 | -                 | 0.00%          |
| 0704                             | Payroll Taxes                                 | 12,579            | 12,873            | 294               | 2.34%          |
| 0705                             | Staff Travel                                  | 8,100             | 8,100             | -                 | 0.00%          |
| 0706                             | Unemployment Insurance                        | 1,800             | 1,800             | -                 | 0.00%          |
| 0707                             | 401k Accounts                                 | 16,443            | 16,938            | 495               | 3.01%          |
| 0708                             | Medical Reimbursement Accounts                | 2,000             | 1,600             | (400)             | -20.00%        |
| 0709                             | Payroll Expenses                              | 410               | 410               | -                 | 0.00%          |
| <b>700</b>                       | <b>TOTAL STAFF</b>                            | <b>205,759</b>    | <b>211,101</b>    | <b>5,342</b>      | <b>2.60%</b>   |
| <b>800</b>                       | <b>TRANSFERS &amp; REFUNDS</b>                |                   |                   |                   |                |
| 0802                             | Refunds                                       | -                 | -                 | -                 | 0.00%          |
| 0803                             | Donations                                     | 200               | -                 | (200)             | -100.00%       |
| 0804                             | Scholarships                                  | -                 | -                 | -                 | 0.00%          |
| <b>800</b>                       | <b>TOTAL TRANSFERS &amp; REFUNDS</b>          | <b>200</b>        | <b>250</b>        | <b>50</b>         | <b>25.00%</b>  |
| <b>815</b>                       | <b>DEPRECIATION EXPENSE</b>                   | <b>-</b>          | <b>-</b>          | <b>-</b>          | <b>0.00%</b>   |
| <b>900</b>                       | <b>GRANTS TO LOCALS</b>                       | <b>3,600</b>      | <b>2,600</b>      | <b>-</b>          | <b>-27.78%</b> |
| <b>Total Expenditures</b>        |                                               | <b>\$ 657,176</b> | <b>\$ 686,743</b> | <b>\$ 29,567</b>  | <b>4.50%</b>   |
| <b>General Fund Revenue</b>      |                                               | <b>\$ 667,600</b> | <b>\$ 787,600</b> | <b>\$ 120,000</b> | <b>17.97%</b>  |
| <b>General Fund Expenditures</b> |                                               | <b>\$ 657,176</b> | <b>\$ 686,743</b> | <b>\$ 29,567</b>  | <b>4.50%</b>   |
| <b>Net Ordinary Income</b>       |                                               | <b>\$ 10,424</b>  | <b>\$ 100,857</b> |                   |                |

## 2026 FALL WORKSHOP SCHEDULE

| DISTRICT          | DATE                                          | PLACE                                                                                | CONTACT PERSON                                                                                  |
|-------------------|-----------------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Fifth             | Thurs. Aug 27<br>9:00 AM (ET)                 | Shelbyville Conference and Welcome Center<br>219 Seventh St<br>Shelbyville, KY 40065 | L<br>Dawn Scroggins<br>60 Monroe Lane<br>Campbellsburg, KY 40011                                |
| Jefferson County  | Fri. Aug 28<br>10:00 AM (ET)                  | Audubon Country Club<br>3265 Robin Rd<br>Louisville KY 40213                         | L<br>Vicki Lete<br>1016 Falcon CT<br>New Albany IN 47150<br>502-396-2713                        |
| Central Ky East   | Mon. Aug 31<br>9:00 AM (ET)                   | Boone Tavern<br>100 Main St.<br>Berea, KY 40403                                      | B<br>Janis Barton<br>1084 Amberley Way<br>Richmond, KY 40475<br>606-246-2313                    |
| Central Ky West   | Tues. Sept 1<br>9:00 AM (ET)                  | Clarion Hotel Conference Center<br>1950 Newtown Pike<br>Lexington, KY 40511          | L<br>Lisa Petrey-Kirk<br>5001 Chaplin Rd<br>Willisburg, KY 40078<br>502-680-0740                |
| Northern          | Wed. Sept 2<br>9:00 AM (ET)                   | Triple Crown Country Club<br>1 Triple Crown Blvd<br>Union, KY 41091                  | L<br>Brenda Montgomery<br>174 Klee Rd<br>Falmouth, KY 41040<br>859-462-3805                     |
| Eastern           | Thurs. Sept 3<br>9:00 AM (ET)                 | Morehead State University<br>Student Center<br>Ballroom A                            | B<br>Ann Porter<br>P.O. Box 88<br>Washington, KY 41096<br>606 584-2510                          |
| First             | Mon. Sep 14<br>9:00 AM (CT)                   | Kenlake State Park<br>542 Kenlake Rd<br>Hardin, KY 42048                             | B<br>Charlotte Benton<br>3705 Apperson Rd<br>Kevil KY 42053<br>270-564-4469                     |
| Second            | Tues. Sep 15<br>9:00 AM (CT)                  | Moonlite Bar-B-Q<br>2840 W Parrish Ave<br>Owensboro, KY 42301                        | L<br>Susan Weatherford<br>1290 College Dr<br>Madisonville, KY 42431<br>270-836-7641             |
| Third             | Wed. Sep 16<br>9:00 AM (CT)                   | GRREC<br>230 Technology Way<br>Bowling Green, KY 42101                               | L<br>Cecilia Stephens<br>59 Tooley Ridge Rd<br>Tompkinsville, KY 42167<br>(270) 427-6712        |
| Fourth            | Thurs. Sep 17<br>8:30 AM (CT)<br>9:30 AM (ET) | EC3<br>200 Univeristy Dr<br>Elizabethtown, KY 42701                                  | L<br>Shelia Wilkinson<br>1301 Burns Rd<br>Radcliff, KY 40160<br>270-319-2065                    |
| Middle Cumberland | Mon. Sep 21<br>8:30 AM (CT)<br>9:30 AM (ET)   | First Baptist Somerset<br>128 N. Main Street<br>Somerset, KY 42501                   | B<br>Tishana Cundiff<br>11181 South KY 501<br>Liberty, KY 42539<br>606-303-1132                 |
| Upper Cumberland  | Tues. Sep 22<br>9:00 AM (ET)                  | Pine Mountain State Park<br>1050 State Park Rd<br>Pineville, KY 40977                | B<br>Paula Adams/Sherry Skaggs<br>340 Greers Chapel Road<br>Harrogate, TN 37752<br>423-869-8496 |
| Upper Ky River    | Wed. Sep. 23<br>9:00 AM (ET)                  | LKLP Commuity Action, Inc<br>412 Roy Campbell Drive<br>Hazard, KY 41702              | L<br>Karen Griffith<br>20 Twin Cedar Rd<br>Jackson, KY 41339<br>606-568-0113                    |
| Big Sandy         | Thurs. Sep. 24<br>9:00 AM (ET)                | Ramada by Wyndham Hotel & Conf<br>624 James Trimble Blvd.<br>Paintsville, KY 41240   | L<br>Bernard Wicker<br>PO Box 1715<br>Paintsville, KY 41240<br>606-791-4016                     |

All workshop start times are local time. Registration (except Jefferson) begins 30 minutes prior to start time.  
Registration at Jefferson begins 1 hour prior to start time.

## **THE BOURGARD PROGRAM GUIDELINES**

### **MISSION STATEMENT:**

Our mission is to give financial assistance to KRTA members in an effort to uplift their quality of life when a need or emergency impedes their life.

### **PURPOSE:**

The purpose of this program is to address and provide assistance for an immediate financial need of a KRTA member who is undergoing temporary or emergency hardship. This help is intended for a one-time, short term need and not for extended support. The maximum amount awarded will be one thousand dollars (\$1000) per application.

### **ELIGIBILITY:**

A KRTA member receiving a pension from TRS who has encountered a short-term financial hardship may apply for a grant. Examples of these needs may include, but are not limited to housing expenses, health care, transportation, legal assistance, nutrition.

### **HOW TO APPLY:**

Applications can be submitted at any time. The application may be initiated by a KRTA member or designee. The Bourgard Committee will consider the application and determine if the grant will be awarded. After completion, submit the application to:

Kentucky Retired Teachers Association  
Emily Carey, Office Manager  
7800 Leaders Lane  
Louisville, KY 40291

### **MISCELLANEOUS:**

Requested funds will be awarded in a timely manner.

At this time, there is no set number of grants that will be awarded. Funds may dictate the availability of grants.

Applications will remain as confidential as possible and will be retained by the KRTA for as long as is legally necessary.

# BOURGARD FUND APPLICATION

*Our mission is to give financial assistance to KRTA members to help uplift their quality of life when a need or emergency impedes them.*

Complete Section 1 and Section 2, if applicable, and return to:

Kentucky Retired Teachers Association, 7800 Leaders Ln., Louisville, KY 40291

## SECTION 1

Grant Seeker Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Current Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_ Email Address: \_\_\_\_\_

Is the grant seeker a KRTA member in good standing for at least 5 years?

\_\_\_\_\_ Yes \_\_\_\_\_ No

Is the grant seeker receiving a TRS pension? \_\_\_\_\_

If this is a loss of housing or serious housing damage, is it the primary resident? YES NO

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.)*

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Check payable to: *(If requesting a bill be paid include a billing statement for direct payment purposes.)*

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How would you like to be notified of the committee's decision?

\_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_ Mail

## SECTION 2

To be completed only if Section 1 is completed by someone other than the Grant Seeker.

Name of Person Completing Application: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address \_\_\_\_\_

## SECTION 3 *For Foundation Office Use Only*

\_\_\_\_\_ Approved \_\_\_\_\_ Denied \_\_\_\_\_ Not Eligible \_\_\_\_\_ More Information Required

KRTA Representative Signature: \_\_\_\_\_

Date Received: \_\_\_\_\_ Date Processed: \_\_\_\_\_

Check Number: \_\_\_\_\_

**The information on this application will remain confidential.**

**\*If your financial situation improves, please consider donating to the Bourgard Fund in the future. \***

# KRTA CONSTITUTION

## ARTICLE I. NAME

The name of the Association shall be the Kentucky Retired Teachers Association, referred to as KRTA.

## ARTICLE II. PURPOSE

The purpose of the Association shall be:

1. To promote the economic, social, health, and professional interests of retired teachers.
2. To act on behalf of retired teachers in matters involving their needs.
3. To afford opportunity for the expression and interchange of opinions on matters of special interest to all retired teachers.
4. To aid and support worthy legislation and community efforts to improve public education.
5. To work with national and other state professional organizations on promoting membership and cooperating in legislative efforts.

## ARTICLE III. MEMBERSHIP

1. Active Members: Any retired teacher, supervisor, or school administrator formerly employed in any school system or who receives retirement benefits from the Teachers Retirement System (TRS) of Kentucky may become an active member of the Association upon payment of the annual dues.
2. Associate Members: Any person interested in the welfare of KRTA may become an associate member upon payment of annual dues. Associate members are only eligible for program benefits and cannot hold an office or vote.
3. Honorary Members: Honorary membership may be extended to persons upon the approval of the Executive Council and has no voting privileges.

## ARTICLE IV. GOVERNANCE

The Governing body of the Association shall consist of the following.

1. The Executive Board comprised of the President, President-Elect, Vice-President, and Immediate Past-President.
2. The Executive Council
3. The Delegate Assembly

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

## ARTICLE V. AFFILIATES

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

#### **ARTICLE VI. AMENDMENTS**

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

#### **ARTICLE VII. ADOPTION AND EFFECTIVE DATE**

Upon adoption, the constitution shall become effective immediately.

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

## **ARTICLE I. OFFICERS**

Section A. The Executive Board of the Association shall consist of the following officers:

President, President-Elect, Vice-President, and Immediate Past-President.

Section B. Duties of the Officers.

### **1. The President**

- a. The President shall be the executive officer of the Association and of the Executive Council. The term of office shall be for (1) year beginning July 1 and ending June 30 each year after the annual convention.
- b. The President shall carry out rules and regulations and policies as set forth by the Executive Council and the association as well as perform the duties prescribed by the Constitution.
- c. The President shall make an annual report to the Delegate Assembly.

### **2. The President-Elect**

- a. The President-Elect shall serve as President if for any reason the President is unable to serve.
- b. The President-Elect shall automatically succeed and be deemed elected without convention vote, to the office of President.
- c. The President-Elect shall keep in contact with the district chairpersons giving help whenever possible.
- d. The President-Elect shall assist in formulating programs for the meetings and workshops and perform any other duties which the President or Executive Council may designate.

### **3. The Vice-President**

- a. The Vice-President shall serve as President in the absence of the President and President-Elect.
- b. The Vice-President shall assist the President at such functions and times as requested by the President or Executive Council.
- c. The Vice President shall automatically succeed and be deemed elected without convention vote, to the office of President Elect.

### **4. The Immediate Past-President**

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

## ARTICLE II. EXECUTIVE COUNCIL

1. The Executive Council, hereafter referred to as the Council, shall consist of:
  - a. The Executive Board consisting of the President, President-Elect, Vice-President, and the Immediate Past-President. The Executive Board shall act for the Association between meetings of the Council and in addition shall have sole responsibility for any matter expressly delegated to it by the Delegate Assembly or Council
  - b. Fourteen members to be elected at the District fall meeting for a term of two years (or until a successor has been duly elected), to take office on July 1 following the meeting at which they were elected. Council members shall be elected in the following manner: The First, Third, Fifth, Central Kentucky East, Upper Kentucky River, Northern Kentucky, Big Sandy, and Central Kentucky West shall elect members for terms beginning in odd number years. The Second, Fourth, Louisville & Jefferson County, Middle Cumberland Upper Cumberland and Eastern Kentucky shall elect Council members for terms beginning in even number years. Council members may serve in succession for no more than two full terms.
  - c. The Executive Council nominees must be voted in by the District they represent and cannot hold any other paid or volunteer state level position.
  - d. All elected members of the Council shall each have full voting privileges.
2. The Council shall act for the Association ad interim. The President shall be chairperson of the Council and the Executive Director or designee shall serve as Secretary of said Council. The Council shall meet on the call of the chairperson or written petition to the chairperson signed by a majority of the Council members. A majority of the Council present at a meeting shall constitute a quorum for transacting business.
3. The Executive Council shall hold a minimum of two meetings per fiscal year. Meetings can be virtual or in person.
4. The Executive Council shall adopt rules and regulations for conducting its meeting and performing its functions in conducting the business of the Association.
5. In case of a vacancy, the District with the vacancy, will elect a member to fill the vacancy for the remainder of the term.
6. The Executive Council shall have the authority to employ and prescribe the duties of an Executive Director. Other staff members may be employed by the Council upon the recommendation of the Executive Director.
  - a. The Executive Director
    - (1). The Executive Director shall be the Administrative officer of KRTA.
    - (2). The Executive Director or designee shall take the minutes of the KRTA Delegate Assembly and the Executive Council and submit a copy to all parties concerned as soon as possible.

- (3). The Executive Director or designee shall keep on file in the KRTA office all minutes, communications, and committee reports.
- (4). The Executive Director or designee shall serve as the Editor of the KRTA Newsletter.
- (5). The Executive Director shall be evaluated annually by the Executive Council.
- (6). The Executive Director shall present an annual budget and be responsible to see that an annual audit is performed.

### **ARTICLE III. AFFILIATES**

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

Section B. Governance Affiliates

1. The District Associations shall be organized by counties as follows:
  - a. First District: Ballard, Caldwell, Calloway, Carlisle, Crittenden, Fulton, Graves, Hickman, Livingston, Lyon, Paducah/McCracken, Marshall, and Trigg.
  - b. Second District: Christian, Owensboro/Daviess/McLean, Hancock, Henderson, Hopkins, Union and Webster.
  - c. Third District: Allen, Barren, Butler, Cumberland, Edmonson, Logan, Metcalfe, Monroe, Muhlenberg, Ohio, Simpson, Todd, and Warren.
  - d. Fourth District: Breckinridge, Grayson, Green, Elizabethtown/Hardin/LaRue, Hart, Marion, Meade, Nelson, Taylor, and Washington.
  - e. Fifth District: Bullitt, Carroll, Franklin (Capital City), Henry, Oldham, Owen, Shelby, Spencer and Trimble.
  - f. Louisville and Jefferson County
  - g. Central Kentucky West: Scott, Harrison, Woodford, Fayette/Bourbon (Bluegrass), Jessamine, Anderson, Mercer, Clark, Nicholas/Robertson and Boyle.
  - h. Central Kentucky East: Madison, Garrard, Lincoln, Jackson, Lee, Estill, Powell, Rockcastle, EKU, and Montgomery.
  - i. Eastern District: Boyd, Carter, Elliott, Rowan, Menifee, Bath, Fleming, Lewis, Mason, Greenup, and Morgan.
  - j. Big Sandy District: Lawrence, Magoffin, Johnson, Martin, Floyd, and Pike.
  - k. Middle Cumberland District: Adair, Casey, Clinton, McCreary, Pulaski, Russell, and Wayne.
  - l. Northern District: Boone, Bracken, Campbell, Gallatin, Grant, Kenton, and Pendleton.
  - m. Upper Cumberland District: Bell County/Pineville, Middlesboro Independent, Clay, Harlan, Knox, Laurel and Whitley.

- n. Upper Kentucky River District: Breathitt, Knott, Leslie, Letcher, Owsley, Perry, and Wolfe.

#### **ARTICLE IV. DELEGATE ASSEMBLY**

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

#### **ARTICLE V. DUES**

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

#### **ARTICLE VI. VICE PRESIDENT NOMINATION**

1. The District will elect a Vice-President nominee using the KRTA Presidential Rotation, by December 15 prior to the Delegate Assembly.
2. On or before December 15, before the annual convention, the President shall appoint an interview Committee of five Past Presidents, not more than two from the Executive Council. This committee will meet with the District's nominee to discuss the duties of KRTA officers and present the nominee to the Delegate Assembly.
3. If the District has not submitted a nominee, then the rotation continues.
4. The President shall present the Vice-President nominee to the Delegate Assembly.
5. The newly elected officer shall take office July 1 following the annual meeting.

#### KRTA PRESIDENTIAL ROTATION

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

#### ARTICLE VII. COMMITTEES

1. Standing Committee Members are elected by Districts. Chairs and Co-Chairs of committees are appointed by the Executive Director and approved by the Executive Council. No person can be a member of more than one state committee. Responsibilities of each committee will be published.
  - a. Legislative
  - b. Membership
  - c. Health & Insurance
2. Ad-Hoc Committees - Appointed by the President for a specific objective.

#### ARTICLE VIII. TERMS OF OFFICE

The term of office for President, President Elect, Vice President shall be one year, except where specified otherwise, or until their successors are elected or appointed.

#### ARTICLE IX. QUORUM

1. A quorum of the Delegate Assembly shall be a majority of its qualified registered delegates present.

#### ARTICLE X. AMENDMENTS

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

Delegate Assembly is required.

**ARTICLE XI. RULES OF PROCEDURE**

The most recent edition of *Robert's Rules of Order* shall be the authority governing all matters of procedure not otherwise provided in the Constitution of these Bylaws.

**ARTICLE XII. FISCAL MEMBERSHIP YEAR**

The fiscal year of the Association shall begin July 1 and end June 30 of the following year.

**ARTICLE XIII. ADOPTION AND EFFECTIVE DATE**

Upon adoption, By-Laws shall become effective immediately.

## LEGISLATIVE



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## 2026 KRTA LEGISLATIVE PRIORITIES

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

We thank the Kentucky General Assembly for fully funding TRS since 2016. We urge the General Assembly to continue this fiscally responsible practice moving forward. By fulfilling the state's actuarially required contributions, TRS solvency will continue to improve until the system becomes 100% funded. Investment income, not tax dollars, pays for the vast majority of TRS's pension benefits. Foregoing the Commonwealth's financial obligation to the pension system, while saving the state money in the short-term, will in the long run cost Kentucky's taxpayers double any saved amount over a 10-year period due to the loss of investment income.

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

Since teachers are ineligible for Social Security benefits, payouts from TRS are the only income Kentucky retired teachers receive. Defined benefit (DB) retirement plans are 40% less expensive and more efficient than 401(k)-style defined contribution plans. DB plans are the most effective and efficient way to ensure a dignified retirement for teachers as well as the best way to attract and retain new educators for the state's public-school systems.

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

In 2010, Kentucky's education community came together with elected officials and crafted a plan to ease the healthcare liabilities on Kentucky's taxpayers and to ensure affordable healthcare access for active and retired teachers. Since its founding, the Shared Responsibility Law has saved taxpayers hundreds of millions of dollars while providing good medical benefits to Kentucky's retired teachers. We thank our legislators for fully funding the state's obligation for the Shared Responsibility Plan (Retiree Health Insurance) and ask that they on this fiscally responsible course.

### **IV. Maintain the current TRS board structure.**

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

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

Kentucky's retired teachers live on a fixed income, one that averages less than \$40,000 in benefit payouts annually. With inflation a constant, legislation resulting in higher prescription costs could result in thousands of retired teachers becoming economically vulnerable.

## STANDING COMMITTEES 2026-2027

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## **KRTA OFFICE MEMBERSHIP PROCEDURES**

### **JUNE**

First week of June—All cash members are made inactive, and all ADD (Automatic Dues Deduction) members on hold are pulled and made active auto in the KRTA database.

First Week of June—A letter with a Cash and ADD form is mailed to all nonmember retirees who have been retired 9 years or less soliciting their membership.

First Week of June—A letter with a Cash and ADD form is mailed to each cash member soliciting their membership renewal.

### **JULY**

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

### **AUGUST**

First Week of August—A second letter will be sent to all nonmember retirees (retired 9 years or less) soliciting their membership and all Cash renewal members who have not yet sent in their renewals.

### **EACH MONTH**

All new retirees, deceased retirees, and address changes are received from TRS.

New retirees are added to computer file and county list. This is always one month behind.

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

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

Letter with Membership Brochure sent to all other new retirees congratulating them and soliciting their membership.

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 the Local Association.

Deceased members are deleted from computer file and ADD cards are removed from files

Names of deceased are recorded by county or state for printing in the quarterly newspaper.

All nonmembers, retired 10 years or more who have never joined KRTA, have been moved to a category "Not Interested." If they do decide to join, they will be placed back on the membership list.

Membership lists are titled Member and Nonmember.

## **DAILY**

Memberships are received and processed daily. A Membership Card and green sheet are mailed to the new member.

## **AS REQUESTED**

Updated county lists and/or mailing labels for active and inactive members. Reports can be mailed or emailed—available in PDF format and Excel. Last county taught and retire date can be helpful to identify how to approach the member. Let the office know how your report can be customized to best fit your needs.

Nonmembers that have been retired 10 years or more and have never joined can be removed from a county list. A retiree can also request their membership be moved to another county or removed from our database at any time by calling the KRTA office.

Other documents can be mailed—such as KRTA brochure, Membership Benefits (green sheet), Medical Insurance Information (yellow sheet), Legislative Program (blue sheet)

County lists are corrected by calling the KRTA office at 1-800-551-7979.

## **KRTA Membership Committee Responsibilities**

The purpose of the Membership Committee is to Recruit, Retain, and Re-enlist members

for the local and district RTA and KRTA. For its success, the cooperative support of all officers and the general membership is needed.

### **District Membership Chairs: Responsibilities**

1. During the month of June and before June 30th, contact the local membership Chair inquiring their leadership role for the next year. If they are stepping down, secure the name of the person replacing them. In some situations, the local president has been doing the membership work. In these situations, encourage them to enlist a local membership chair by July 1. Follow up July 1, with a phone call to the local president to obtain the name of their local membership chair. Combine a list of local membership chairs, with updated address, phone numbers including cellular numbers, and email addresses. Be sure to get the updated list to KRTA office by July 15th.
2. Attend State Membership Meeting in July.
3. Contact local membership chairs to obtain updated email addresses for members and have them check to be sure that is the correct address that KRTA has on file. Encourage local chairs to develop a phone tree for local members who do not have e-mail or text. Some of the members will not get the updated information if they do not have technology.
4. One-on-one contact is important. But don't wait for meetings... Technology should be used to contact chairs: email, text, or phone your local chairs on a regular basis with any new information. Create an email or text list to quickly contact local membership chairs.
5. Meet with and invite all local membership chairs to district RTA meetings, KRTA Fall Workshop, and KRTA State Convention. If the meetings are virtual, your attendance is still very important. Try to make a personal contact to local chair to invite them to the district meeting.
6. Conduct a local membership chair meeting (15-30 minutes) prior to district meetings. Check on their needs: white cards, cash forms, green sheets, lists. Find out how you can help them to reach their non-members. If district meeting is not in person have a short district chair/ local chair Zoom meeting.
7. Give report of status and any new information concerning membership at each district meeting. Hand out report to members before meeting. District

membership chairs should give out current membership lists to each local chair at the meetings. Remind the locals how to use the different lists that are available Members, Non-members, last county taught and year of retirement.

8. Be sure to send each of the local chairs the goal for the district and their local, so, they can see what they need in order to achieve their goal.
9. During Membership Drive Campaign contact each local membership chair preferably by phone.
10. Develop a list of reasons for joining the local, district, and state associations. (Each chair adjusts the list to your area and locals) the green sheet is factual sheet of information.
11. Check monthly for new retiree lists. Always encourage your general membership to make personal contacts with new retirees whenever possible. Call office manager at KRTA office to get this.
12. On a monthly basis get the % report for the district from KRTA and email the latest % to your local chairs. Keep them abreast of their success in reaching their membership goals.
13. Prepare a report of how each of your locals worked to reach their membership goals for the State Membership Committee in July. A report should be sent to the Executive Director prior to the actual meeting. Encourage each of your locals to contribute info to you for your report about what works and doesn't work for them. Sharing these ideas is important on local and state level as well. Communication is vital to successes. Sometimes we find out something that worked for another district or local that will be pertinent to our districts or local. Remember, membership is everybody's business. Membership is the life-blood of KRTA.
14. Remember to encourage the local chairs as they are accomplishing their goals. That "pat on the back" is so necessary. KRTA leaders are volunteers. The encouragement and support of one volunteer to another will go a long way to develop and strengthen leadership.
15. Be a better KRTA Ambassador by staying informed with current information!

## **Local Membership Chair**

The purpose of the Membership Committee is to Recruit, Retain and Re-enlist members for the local and district RTA and KRTA. For success, the cooperative support of all officers and the general membership is needed.

Be informed! The better informed you are about the benefits of belonging the better “ambassador” you will be!

### **May**

Sometime before school ends, get a list of teachers who are retiring and addresses from the district office, or phone the local schools to inquire about retirees or persons close to retirement. The local school secretary will usually be able to give you that information.

You may be able to personally meet with them to invite them to join. Take a white ADD card to the schools to meet each retiree. If possible, get the upcoming retiree to fill out the white card before you leave. Offer to mail the card for them... even if their official date isn't until July 1 or a little later. KRTA office will hold it, and when KRTA receives the list from TRS, they will process it at that time.

Official year for membership is July 1st – June 30<sup>th</sup>

Early June or July, contact KRTA at 1-800-551-7979. KRTA office manager will help you with whatever you need.

Ask for:

- List of active and non-members in KRTA in your county (Can get a PDF or Excel list if you want on your computer); or they will mail a list to you if needed)
- Preprinted self-stick address labels are available from the KRTA office upon request for members and non-members. You may want to personally address the ones to the non-members. (They are more likely to open a hand addressed envelope rather than a pre-printed label). With the Excel list you may print your own labels.
- Request or download from the KRTA website ADD (Automatic Dues Deduction) cards to send to all the non-members and newly retired teachers. Print the county name on the back of the card and your local will earn a \$5 credit. It is called One-for-One Campaign. That is paid out one year behind, so any received this year the \$5 would be totaled and mailed to your local the next year. It doesn't only have to be for a new member, it can also be for an active member that is being converted from cash to ADD. Contact KRTA office no later than May 1 to verify total number of cards with county name.

Contact the KRTA office for updated membership lists throughout the year. Remember your membership will fluctuate throughout the year with new retirees and deceased members. The second week of each month is a good time to ask for new list. Retirees are not added to the KRTA lists until a month and usually at least a week after the actual date of retirement. Example: July 1 retiree would not show up on the list until August.

Request an Excel list of your retirees with the date retired and county retired from. The list may contain names who retired from a state facility which will appear on the list as a number. The number will indicate the facility in which they worked.

Use current members as liaisons to the new retirees to encourage them to join. Link together retirees who worked in the same building or central office staff with non-members who have not joined. If there is a university, community college, or technical school in your area, link retirees from these organizations together.

Upon obtaining your membership list from KRTA regarding members and non-members, double check your list. Contact non-members and encourage them to join both the local and state organizations.

Follow up the KRTA June and August mailings to new retirees and non-members who have not joined with a personal communication.

Give Them Reasons to Join:

- Remind retirees about the COLA increases yearly and health insurance benefits they receive that many retiree groups do not.
- Talk about how KRTA being one of the largest retiree organizations.
- Remind retirees that KRTA looks after their benefits.

Your personal contact may be what convinces them to join. Use a chart to record your contacts. This way you do not end up contacting someone who wished not to be contacted; document this on your chart.

Join KRTA online. [www.krta.org](http://www.krta.org)

Join KRTA by phone 1-800-551-7979 or 502-231-5802

Join KRTA by mail. 7800 Leaders Lane, Louisville, KY 40291-3234

Attend district meetings and Fall Workshop

Attend KRTA State Convention

**Local Lists contain the following:**

Auto – indicates membership by automatic dues deduction (white card)

Cash – indicates membership by cash payment

Non-member – anyone who has not joined within 10 years of retirement.

“O” indicates the person was never a member of KRTA

“L” means they were a member, but have not paid their dues for the ongoing year... dues have lapsed.

October (last Friday) all ADD cards (white cards) need to be in the KRTA office in order for dues to be deducted from their TRS paycheck. If need be scan the front and back of the card and email them to the office to get them enrolled as an active member before the deadline.

Deceased members will not be removed from your lists, nor will new retirees be added to your list November through the January deadline. List will be updated with deceased and new retirees after Martin Luther King Day – which will start the next years membership drive.

Call your district membership chair or state co-chair to speak at your meeting.



## KENTUCKY RETIRED TEACHERS ASSOCIATION MEMBERSHIP ENHANCEMENTS

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(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.ccuky.org
  - Savings, Free Checking, Individual Retirement Accounts
  - Mortgages, Home Equity, Vehicle Loans / Home Equity Credit Cards
  - Special attention to 55+, some restrictions do apply
- **AAA** Chasity Christian (713) 261-2601 Christian.chasity@ace.aaa.com
- **North American Life Plans**
  - Jeff Johnson (502) 553-7630 or Jim Curley (502) 299-1414
  - 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 or <https://krta.org/collettetravel/>
  - #1319625 Canadian Rockies & Glacier National Park August 16 - August 22, 2026
  - #1319628 New York City Holiday, Dec. 7 - Dec. 11, 2026
  - #1421863 Discover South Pacific Wonders, Jan. 26 - Feb. 9, 2027
  - #1421846 Discover Alpine Lakes & Scenic Trails, April 26- May 5, 2027
  - #1423853 Exploring South Africa, Victoria Falls, and Botswana November 2-16, 2027
- **Heuser Hearing institute:** (502) 584-3573 or [www.thehearinginstitute.org](http://www.thehearinginstitute.org)
  - No charge exam and consultation
  - Members discounts
- **Comfort Keepers:** (606) 676-9888 or [www.comfortkeepers.com](http://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](http://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](http://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](http://www.trs.ky.gov)**

**1-800-618-1687**

**[info@trs.ky.gov](mailto:info@trs.ky.gov)**

#### **TRS (MEHP) 65 and over or Medicare Eligible**

**Humana** 1-866-307-2494 (effective Jan 1, 2026 )

[your.humana.com/trsky](http://your.humana.com/trsky)

**Express Scripts, Medicare Part D** 1-877-866-5834

[www.express-scripts.com](http://www.express-scripts.com)

**KYRx Coalition** 1-855-218-5979

[www.kyrx.org](http://www.kyrx.org)

**Corielle DNA Testing** 1-888-454-9024

**Silver Sneakers** 1-888-423-4632

**Humana Well Dine** 1-877-402-1030

**GO 365** 1-866-307-2494

**PERS (Life Alert)** 1-855-681-5356

**MD LIVE (Virtual Care)** 1-888-673-1992

[www.mdlive.com/humanamedicare](http://www.mdlive.com/humanamedicare)

**TruHearing** 1-888-939-3635

#### **TRS (KEHP) 65 and under NOT Medicare Eligible**

**Medical Anthem BCBS** 1-844-402-KEHP

[www.anthem.com](http://www.anthem.com)

**Prescription CVS Caremark** 1-866-601-6934

[www.caremark.com/](http://www.caremark.com/)

**KYRx Coalition** 1-855-218-5979

[www.kyrx.org](http://www.kyrx.org)

**SmartShopper** 1-855-869-2133

[www.smartshopper.com](http://www.smartshopper.com)

**Living Well Promise** 1-800-681-6758

[www.mycastlight.com/mybenefits](http://www.mycastlight.com/mybenefits)

**Turning 65 Soon?** 1-800-618-1687

[www.trs.ky.gov/retired-members/turning-65/](http://www.trs.ky.gov/retired-members/turning-65/)

**Virtual Healthcare**

[www.livehalthonline.com](http://www.livehalthonline.com)

05/2026

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**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 | <a href="http://www.trs.ky.gov/retired-members/age-65-over/">www.trs.ky.gov/retired-members/age-65-over/</a> |
| Express Scripts, Medicare Part D 1-877-866-5834        | <a href="http://www.express-scripts.com/">www.express-scripts.com/</a>                                       |
| KYRx Coalition 1-855-218-5979                          | <a href="http://www.kyrx.org">www.kyrx.org</a>                                                               |
| Corielle DNA Testing 1-888-454-9024                    | <a href="http://www.coriell.com/trs">www.coriell.com/trs</a>                                                 |
| 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               | <a href="http://www.UHChearing.com/Retiree">www.UHChearing.com/Retiree</a>                                   |
| Personal Emergency Device 1-855-595-8485               | <a href="http://www.lifeline.com/uhcgroup/">www.lifeline.com/uhcgroup/</a>                                   |
| Roots Food Group 1-888-322-2305                        | <a href="http://www.rootsfoodgroup.com/">www.rootsfoodgroup.com/</a>                                         |

**TRS (KEHP) 65 and under NOT Medicare Eligible**

|                                                |                                                                                                            |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Medical Anthem BCBS 1-844-402-KEHP             | <a href="http://www.anthem.com">www.anthem.com</a>                                                         |
| Prescription CVS Caremark 1-866-601-6934       | <a href="http://www.caremark.com/">www.caremark.com/</a>                                                   |
| KYRx Coalition 1-855-218-5979                  | <a href="http://www.kyrx.org">www.kyrx.org</a>                                                             |
| SmartShopper 1-866-832-2436                    | <a href="http://www.smartshopper.com">www.smartshopper.com</a>                                             |
| Living Well Promise 1-800-681-6758 (CastLight) | <a href="http://www.mycastlight.com/mybenefits">www.mycastlight.com/mybenefits</a>                         |
| Turning 65 Soon? 1-800-618-1687                | <a href="http://www.trs.ky.gov/retired-members/turning-65/">www.trs.ky.gov/retired-members/turning-65/</a> |