LOCAL PRESIDENT'S HANDBOOK 2026-2027



A GUIDE FOR LOCAL RTA LEADERSHIP

Serving Retired Teachers Since 1957

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INTRODUCTION

This Local President's Handbook is provided as a guide for the local association presidents. Presidents are encouraged to pull forms from this handbook when report due notices are received from the KRTA office. Other forms that represent suggested activities may be used in any way that may be helpful.

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 your time in volunteering to be a local president!

CONTACT US AT ANYTIME WE ARE HERE TO SERVE YOU!

1-800-551-7979

info@krta.org

M-TH 8:30-4:00

FR 8:30-2:00

PRESIDENT'S CHECKLIST

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.

- Meet with your local committees by July or August to plan programs and meeting dates and places for the upcoming year.
- Make committee assignments and/or ask for volunteers
- Prepare budget for upcoming year
- Hold a total of 4-6 meetings per year for points on the *Local Association Recognition Program*
    - Have at least one program per year on Membership, Legislation, Health/Insurance, and/or 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 KRTA Legislative Program

♦ **Health/Insurance:** Secure, review, and distribute information pertaining to health and insurance

♦ **Member Care:** Suggested activities may include visiting nursing homes (or holding meetings in the nursing home if retired teachers reside there); inviting AARP speakers on Medicare/social security issues; etc.

Recognize new retirees at luncheons, dinner, or reception. Retirees should be introduced to KRTA and given the opportunity to sign an automatic dues deduction (ADD) card. Complete ***New Retiree Recognition Program Reimbursement Form*** 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. Send ***Fall Workshop Reservations*** 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 coordinating this with the KRTA Office Membership Procedures section. Call the KRTA office for updated membership lists and labels whenever needed
- ♦ 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.**
- ♦ Health/Insurance: Help keep membership informed on current insurance concerns and healthy lifestyles

➢ **KRTA State Convention (April)**

- ♦ Elect delegates to the KRTA State Convention and return ***Delegates to the Delegate Assembly Form 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 Funds (a minimum of $40 for each required for Local Recognition Form points extra points are obtained with another donation to each fund) Please issue seperate checks
- ♦ Tally the total number of volunteer hours and list volunteer activities for the local association for the period January1-December 31 as this is required on the Local Recognition Form
- ♦ Complete ***Local Association Recognition Program Form*** and send it to the KRTA office by March 15.

➢ Elect officers by early June (Send ***Local Officers Form t***o the 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.***

➢ The KRTA office will send emails to the local president advising when deadlines are approaching.



LOCAL OFFICERS FORM

LOCAL: _____ **YEAR:** _____

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

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

LOCAL TREASURER: _____
PHONE: _____
ADDRESS: _____
EMAIL: _____

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

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

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

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"

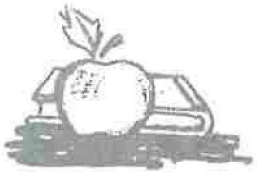
Your duties as members, officers and other local RTA leaders will prove to be a challenge. You have a responsibility to work and plan together; a responsibility of service to your community, and fellowship to each other.

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!

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 <u>suggested</u> 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

_____

_____

Health&Insurance Committee

_____,

Chair

_____

_____

Membership Committee

_____,

Chair

_____

_____

Communications Committee

_____, Secretary

_____

_____

Public Relations Committee

_____,

Chair

_____

_____

Program Committee

_____,

Chair

_____

_____

Caring Committee

_____, Chair

_____

_____

Hospitality Committee

_____, Chair

_____

_____

Community Service Committee

_____, Chair

_____

_____

Devotion Committee

_____, Chair

_____

_____

Finance Committee

_____, Treasurer

_____

_____

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, KY40291 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 please provide numbers for #1

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

1-4	**10 Points**	_____
5 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

- AARP Materials (visual and printed)
- 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
- Legislation by a representative from KRTA
- Membership by a representative from KRTA
- Nutritional information
- 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
- Medication safety
- Overview of the services available to the community by a Mental Health Services speaker
- Cancer by a Cancer Clinic representative
- The Living Will
- Hospice services offered
- Positive attitude speaker
- Update on KRTA by a KRTA representative
- Long-term health care options
- 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

NEW RETIREE RECOGNITION PROGRAM
EXPLANATION

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 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:

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 in Attendance **TOTAL**

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**

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

6/25/09

2026 FALL WORKSHOP SCHEDULE

DISTRICT	DATE	PLACE	CONTACT PERSON
Fifth	Thurs. Aug 27 9:00 AM (ET)	Shelbyville Conference and Welcome Center L 219 Seventh St Shelbyville, KY 40065	Dawn Scroggins 602-303-4996
Jefferson County	Fri. Aug 28 10:00 AM (ET)	Audubon Country Club L 3265 Robin Rd Louisville KY 40213	Vicki Lete 502-396-2713
Central Ky East	Mon. Aug 31 9:00 AM (ET)	Boone Tavern B 100 Main St. Berea, KY 40403	Janis Barton 606-246-2313
Central Ky West	Tues. Sept 1 9:00 AM (ET)	Clarion Hotel Conference Center L 1950 Newtown Pike Lexington, KY 40511	Lisa Petrey-Kirk 502-680-0740
Northern	Wed. Sept 2 9:00 AM (ET)	Triple Crown Country Club L 1 Triple Crown Blvd Union, KY 41091	Brenda Montgomery 859-462-3805 859-462-3805
Eastern	Thurs. Sept 3 9:00 AM (ET)	Morehead State University B Student Center Ballroom A	Ann Porter 606-584-2510
First	Mon. Sep 14 9:00 AM (CT)	Kenlake State Park B 542 Kenlake Rd Hardin, KY 42048	Charlotte Benton 270-564-4469 270-564-4469
Second	Tues. Sep 15 9:00 AM (CT)	Moonlite Bar-B-Q L 2840 W Parrish Ave Owensboro, KY 42301	Susan Weatherford 270-836-7641
Third	Wed. Sep 16 9:00 AM (CT)	GRREC L 230 Technology Way Bowling Green, KY 42101	Cecilia Stephens 270-427-6172
Fourth	Thurs. Sep 17 8:30 AM (CT) 9:30 AM (ET)	EC3 L 200 University Dr Elizabethtown, KY 42701	Shelia Wilkinson 270-319-2065
Middle Cumberland	Mon. Sep 21 8:30 AM (CT) 9:30 AM (ET)	First Baptist Somerset B 128 N. Main Street Somerset, KY 42501	Tishana Cundiff 606-303-1132
Upper Cumberland	Tues. Sep 22 9:00 AM (ET)	Pine Mountain State Park B 1050 State Park Rd Pineville, KY 40977	Paula Adams/Sherry Skaggs 423-869-8496
Upper Ky River	Wed. Sep. 23 9:00 AM (ET)	LKLP Jobsite Building L 412 Campbell Drive Hazard, KY 41702	Karen Griffith 606-568-0113
Big Sandy	Thurs. Sep. 24 (9:00 AM (EST)	Ramada by Wyndham Hotel & Conf L	Bernard Wicker 606-791-4016

KRTA FALL WORKSHOP RESERVATIONS

_____ _____

NAME OF LOCAL ASSOCIATION **DATE**

ALL 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 ON THE WORKSHOP SCHEDULE AT LEAST ONE (1) WEEK PRIOR TO DATE OF THE WORKSHOP.

LOCAL RTA RESERVATIONS PAID FOR:

NAME	COUNTY

OTHER MEMBERS ATTENDING AT THEIR OWN OR LOCAL RTA EXPENSE:

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

USE BACK OF PAGE IF MORE SPACE IS NEEDED.

LOCAL MEMBERSHIP 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 check on overlapping topics
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.

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. Call the KRTA office for updated membership lists and mailing labels.

Local lists from the state office contain the following information:

- State Member or State non member status
- Contact information
- Auto - indicates membership by automatic dues deduction (ADD)
- Cash - indicates membership by cash payment
- Non-member - Not a KRTA member
- "O" indicates the person was once a member of KRTA
- "L" means they were a member the previous year but have not paid their dues for the current year ... dues have lapsed
- "Blank" indicates never have been a member

Mid October is when all ADD cards need to be in the KRTA office for dues to be deducted from their TRS paycheck. If need be you scan the front and back of the card and email them to the office to get them enrolled as an active member before the deadline.
During the months from October through the January deadline (MLK Day) deceased members will not be removed from your lists. They will be removed after the ML King Day cut off. This also applies to new retirees during those months

We have Four (4) options to Renew or Join KRTA
Membership year: July 1 to June 30 Membership dues: $25 annually

1. **Complete an Automatic Dues Deduction Card and return it to the KRTA office.**
    a. **To submit an electronic version, visit krta.org, click on join/renew, and select the electronic version or printed version. TRS of KY will automatically deduct the dues of $25 from the November annuity check each year. *If not receiving a monthly benefit payment this option is NOT available, however, if you retire before October 1st of the current year, you will qualify for this option.**

2. **Pay online, visit www.krta.org and click on the "Join/ Renew" tab at the top of the screen. There is a $1 processing fee.**
3. **Complete a cash form and return it with a $25 check to the KRTA office. *7800 Leaders Lane Louisville KY 40291**
4. **Call the KRTA office (1-800-551-7979) and have your credit card ready. There is a $1 processing fee for this choice.**

THE QR CODE WILL TAKE YOU TO THE JOIN/RENEW TAB ON THE WEBSITE

Associate Membership is available for $25 a year to spouses, actively employed educators, local business owners, and others who desire to support KRTA (enrollment must be done over the phone or by mailing in membership- online is not available, unless it is a renewal)

There is also a Membership Handbook that has been created to help with membership recruitment and structuring. It can be found on the KRTA website under Local/District Resources or can be mailed upon request.

AUTOMATIC DUES DEDCUTION PAPER SUBMISSION

Automatic Dues Deduction Authorization

Must be receiving a TRS of KY annuity payment for automatic dues deduction membership option

KRTA
KENTUCKY RETIRED TEACHERS ASSOCIATION

Name _____ Last 4 of SS and 8 digit DOB _____

Address _____ City _____

State _____ Zip Code _____ County Association _____ Retirement Date _____

Phone _____ E-mail Address _____

I request voluntary withholding of annual membership dues in the amount of $25 for the Kentucky Retired Teachers Association from my November annuity payment from the Teachers Retirement System of Kentucky (TRS). I also authorize TRS to share contact and member identification information with KRTA. This authorization will remain in effect until I choose to terminate by written notice to the TRS prior to October 15 of any year.

Kentucky Retired Teachers Association
7800 Leaders Lane
Louisville, KY 40291
info@krta.org
1-800-551-7979

Signature _____

Date _____

CASH MEMBERSHIP & ASSOCIATE MEMBERSHIP FORM

KRTA
KENTUCKY RETIRED TEACHERS ASSOCIATION

KRTA MEMBERSHIP CASH ENROLLMENT FORM

NAME _____ LAST 4 of SS and 8 DIGIT DOB_____

ADDRESS _____
Street and Number, Box or Route Number City State Zip Code

( ) _____
Phone Number Email Address County Retired Teacher Association

I am enclosing my Check #_____ for **$25** to pay my membership in the Kentucky Retired Teachers Association

Date Of Retirement: _____ I am a: ___ New Member ___ Renewal ___ Associate Member

Membership: June 30-July 1 of the following year
KRTA dues are not deductible as a charitable contribution for income tax purposes

Serving Retired Teachers Since 1957

SEND FORM AND CHECK TO THE ADDRESS BELOW:
Kentucky Retired Teachers Association
7800 Leaders Lane
Louisville, KY 40291
Phone: (502) 231-5802 or 1-800-551-7979

LOCAL MEMBERSHIP DUES

Locals are not governed by the state and are free to make decisions that are best to fit their locals' needs. Locals are also able to set their own dues and use those funds as they choose. We encourage locals to do their own mailings for local membership dues. Locals are also encouraged to keep their own spreadsheet or database to determine a retirees' local membership status. KRTA will gladly provide lists and mailing labels to help with these mailings, just contact the office 1-800-551-7979

A retiree is placed in the local association that they reside in, not where they taught. If someone is a member, they can be moved to the local of their choice. If a retiree is not a member, then they cannot be moved among local associations. After 10 years of not being a member and no history of joining, the retiree is placed on a special list known as "not interested" and no local is held accountable for that non member's status. If they do join, they will be placed back on the locals' list that they live in or other is requested.

The following pages contain some ideas to promote your local. It is also a good idea to create relationships with businesses in your area. See if those businesses would be willing to offer retiree discounts to your local retirees that are members of your local.

LOCAL RTA RENEWAL

DATE	FOR YEAR ENDING
July 1, 2026	**June 30, 2027**

SEND LOCAL DUES TO
LOCAL TREASURER'S NAME HERE ADDRESS CITY STATE ZIP

NAME
Retires Name Here or Label

Quantity	Description	Amount	Total
1	Middlesboro RTA one-year **LOCAL** membership *Please make your check payable to MRTA* THANK YOU!		$ 10.00

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 $25 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.

State VS Local

Why Belong To Both?

The state association carries the highest burden of responsibility and has an annual dues of $25 per year

This is the main source of income for KRTA. KRTA actively leads ongoing efforts to protect the retirement system and the benefits retirees receive. With state membership, members have access to a variety of discounts, three printed newspapers, three electronic newsletters, an Annual Convention, and Fall Workshops that take place around the state.

Activities at the local level are financially supported through your local annual dues. Information that is received from the state level is passed to locals and shared with their members. Many associations have additional communications through newsletters and social media. Monthly/quarterly meetings are held creating camaraderie amongst members. Local association efforts in reaching membership goals and participation in community service are recognized at the State Convention.

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**

Caring . . . . . .Darlene Stone

Health/Insurance . . . . . .Leon Rollins

Membership . . . . . .Betty Luther

Community Service . . . . . .Helen 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

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.

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. **Retirees cannot be removed just because they will not join.**

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 having 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 or email to info@krta.org.

LOCAL LEGISLATIVE COMMITTEE RESPONSIBILITIES

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 people. 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.
7. KRTA Legislative Co-Chairs may be contacted to speak at your local meetings.

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*** and ***The Right and the Wrong Way to Write to Legislators).***
4. Visit the state capital with a specific purpose in mind. **(See *How to Visit Your Legislator).***
5. Organize or participate in a legislative phone network.

2026 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 don't pay into Social Security, 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 continue 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.

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.

KET
The Kentucky Network
600 Cooper Drive
Lexington, KY 40502-2296
(606) 233-3000

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

THE RIGHT WAY AND THE WRONG WAY TO WRITE TO LEGISLATORS

The Kentucky Chamber of Commerce and advocacy experts advise writing concise, respectful messages focused on a single piece of legislation. The "right" way ensures you state your constituent status and include a personal story, while the "wrong" way includes multiple issues, threats, or anonymity.

The Right Way to Write:

- **State your position upfront:** Identify yourself as a constituent right away and explicitly mention the bill number (e.g., HB 123) and your desired action (vote "yes" or "no").
- **Keep it brief:** Restrict your letter or email to one page and focus strictly on one issue.
- **Make it personal:** Explain exactly how this specific legislation impacts your local business, community, or family.
- **Provide contact information:** Always include your full mailing address and phone number so the legislator can verify you are a constituent and reply.

The Wrong Way to Write:

- **Don't hide your identity:** Anonymous letters go nowhere. If you don't include your address, your message will be disregarded.
- **Don't write to the wrong representative:** Members of Congress and the Kentucky General Assembly ignore messages from people outside their district. Verify your lawmakers using the Kentucky General Assembly Find Your Legislator tool before sending.
- **Don't list multiple complaints:** Covering different issues in a single letter or email confuses staff and gets your message lost. Address only one issue per communication.
- **Avoid unprofessional language:** Never use profanity, all-caps, or threats. Taking a firm stance is effective, but courteous, respectful communication ensures your voice is taken seriously

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 to:

Introduce your group to your legislator prior to making contact on specific bills

To acquaint a legislator with your views

To seek support for or opposition to a specific bill or provision,

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.

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.

4. Plan your interview in advance:

- Research your legislators
- Look for actions you can praise
- Study their voting record so you can talk specifically about positions
- Research your subject(s)
- Obtain background information from other organizations on the issue
- Look for specific examples you can cite to show the significance of the subject
- Learn the positions of other groups on the issue.
- Know who supports and who opposes action you advocate
- 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.

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 material 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

1. Write to 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.

2. Report to your group on the results of your meeting. Share any insights you gained into the legislator's attitude and concerns. Make sure private comments are not prematurely publicized, however.

3. 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

LOCAL 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 required, magnitude of needs (what committee thinks is most important), special skills required for programs.
   Step 3: Select a program or project.
   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
7. KRTA Health & Insurance Co-Chairs may be contacted to speak at your local meetings.

DELEGATES TO THE KRTA DELEGATE ASSEMBLY

PRESIDENT: _____ LOCAL ASSOCIATION: _____
DISTRICT: _____
NUMBER OF STATE KRTA MEMBERS: _____(1 delegate per 50 members)
MAXIMUM NUMBER DELEGATES YOUR LOCAL ASSOCIATION MAY SEND: _____
THE NAMES OF OUR DELEGATES TO THE 2025 KRTA 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 KRTA no later than March 15.

CHECK AMOUNT $_____ CHECK #_____
(Payable to KRTA)

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
7800 Leaders Lane
Louisville, KY 40291

MISCELLANEOUS:

The funds requested 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? _____

Amount requested (the fund has a $1000 maximum): _____

Please describe how the money requested will be spent: *(Please include any supporting documentation you deem helpful.)*

_____
_____
_____
_____
_____

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

_____

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

_____Email _____ Phone _____ Mail

SECTION 2

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

Name of Person Completing Application: _____ Phone: _____

Address: _____ City: _____State: _____Zip: _____

Email Address _____

SECTION 3 *For Foundation Office Use Only*

_____ Approved _____ Denied _____ Not Eligible _____ More Information Required

KRTA Representative Signature: _____

Date Received: _____ Date Processed: _____

Check Number: _____

The information on this application will remain confidential.

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

KRTA VOLUNTEER PROGRAM

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.

FORM 21
REVISED 5/2014

KRTA VOLUNTEER PROGRAM HOURS

Area Identifying Activity	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total Hours
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 the State winner.

KRTA CONSITUTION

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

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.
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

2026-2027 KRTA OFFICERS

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

PRESIDENT ELECT
Meg Judd
(606) 521-6546
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VICE PRESIDENT
Karen Delaney
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IMMEDIATE PP
Ann Porter
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KRTA EXECUTIVE DIRECTOR
Greg Roush

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EXECUTIVE COUNCIL

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Susan Thurman
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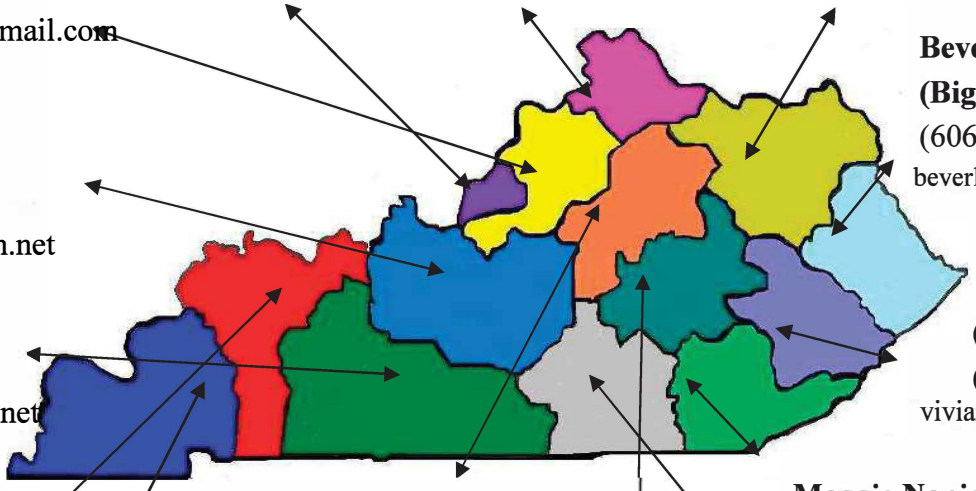
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AARP/KRTA Specialist
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KENTUCKY RETIRED TEACHERS ASSOCIATION

DISTRICT PRESIDENTS
2026-2027

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SECOND
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CENTRAL KY WEST

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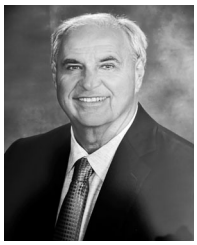
BIG SANDY
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EASTERN
Ann Porter
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annporter42@gmail.com

KRTA STATE COMMITTEE CO-CHAIRS

LEGISLATIVE CO-CHAIRS

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Beth Dowdell
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Benny Lile
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MEMBERSHIP CO-CHAIRS

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Chrissy Jones
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mcjeducate@gmail.com



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



PLEASE FEEL FREE TO REACH OUT TO THE STATE COMMITTEE CHAIRS. THEY HAVE VALUABLE INFORMATION AND ARE HERE TO ASSIST YOU AND YOUR LOCAL. THEY CAN ALSO BE SCHEDULED TO SPEAK AT YOUR MEETINGS UPON REQUEST.

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.

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.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

THIS FACT SHEET SHOULD BE DISTRIBUTED TO MEMBERS ONLY AND CAN CHANGE.
PLEASE CONTACT THE OFFICE FOR THE MOST UP TO DATE COPY

- **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
  - No charge exam and consultation
  - Members discounts

- **Comfort Keepers:** (606) 676-9888 or www.comfortkeepers.com
  - Preferred member rates
  - Free iin 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
1-800-618-1687
info@trs.ky.gov

TRS (MEHP) 65 and over or Medicare Eligible

Humana 1-866-307-2494 (effective Jan 1, 2026)
Express Scripts, Medicare Part D 1-877-866-5834
KYRx Coalition 1-855-218-5979
Corielle DNA Testing 1-888-454-9024
Silver Sneakers 1-888-423-4632
Humana Well Dine 1-877-402-4632
GO 365 1-855-681-5356
PERS (Life Alert) 1-800-533-8954
TruHearing 1-888-939-3635

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

THIS FACT SHEET SHOULD BE DISTRIBUTED TO MEMBERS ONLY AND CAN CHANGE. PLEASE CONTACT THE OFFICE FOR THE MOST UP TO DATE COPY

MEMBERSHIP GOALS

At anytime you can contact the office to check on where your county/district sets with their goal.

- The goal percentage is set early in the calendar year and does not change throughout the calendar year.
- The number of potential and active members can fluctuate throughout the calendar year due to new retirees, loss and transfers between districts, which will cause a change in the actual percentage of members.
- Actual membership percentages should be calculated each month to monitor progress in reaching the goal percentage.
- Calculations:
    - Convert the goal %-age to a decimal number by moving the decimal point two places to the left. For example: 69.5% = 0.695
    - Multiply that decimal number by the potential number of members. This will give you the number of active members needed to reach the goal percentage.
    - Compare that answer to the actual number of active members to see if the goal is reached or not at that point in time.
    - But remember the potential number can change so you'll need to repeat those steps periodically, especially when the potential number of members changes.
    - The bottom section of the goal sheet can help organize the numbers.

Example:
Potential (Members and Non): 600
Total Members: 400
Goals is 69.5%= 0.695

0.695 x 600=417 Total Active Needed
(Goal x Potential=Total Active Needed)

417-400=17 Members Needed to Reach Goal
(Total Active Needed-Total Members = Members Needed to Reach Goal)

K R TA MEMBERSHIP AWARDS

During the KRTA State 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 -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

• Local standing committees for Health & Insurance, Legislation, and Membership

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

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 put KRTA over the KRTA membership goal, with both local and district being recognized for the achievement.

KRTA AND AARP MATCHING GRANT COMMUNITY SERVICE PROJECT

PURPOSE:

1. To encourage local RTAs to participate in 2026-27 Community/School Projects (School Supply Drive and/or Food Bank/Backpack Programs) designed to have a positive impact on their local community.

2. To provide an incentive to local RTAs to become more engaged in their local communities through Community/School Projects (School Supply Drive and/or Food Bank/Backpack Programs).

NAME OF LOCAL ASSOCIATION: _____

LOCAL PRESIDENT _____

PHONE NUMBER: _____

EMAIL ADDRESS: _____

LOCAL TREASURER NAME: _____

Our local will actively participate in Community /School Projects (School Supply Drive and/or Food Bank/Backpack Programs). We are applying for the $50 KRTA Grant (matched by $50 from local RTA funds) to help us achieve the goal set by our goal.

The check will be sent to the local treasurer, and an acknowledgment memo will be sent to the local president.

LOCAL TREASURER NAME: _____

*THIS APPLICATION IS OPEN JULY 1 AND WILL CLOSE JUNE 30 OF THE FOLLOWING YEAR. THE OFFICE WILL ALSO EMAIL THIS TO LOCAL PRESIDENTS AROUND THE FALL TO APPLY.

Grandparent of the Year Essay Contest
2026-27 GUIDELINES

Access this information & all contest forms online at aarp.org/kygrandparentessay
Website address - *https://www.aarp.org/states/kentucky/ky-grandparent-essay-contest/*

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 clear accessible 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, 2026**
- **County winner deadline: February 2, 2027**
- **District winner deadline: March 2, 2027**

  State winner will be announced at the Kentucky Retired Teachers Association (KRTA) Annual Meeting in April 2027. **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 (note this on form).

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 (note this on form).

District winner: Chosen by KRTA District President and/or officers. Each District winner will receive a plaque and a $100 award.

State winner: Chosen by a panel of state level KRTA and AARP officials. The state winner will receive a plaque, a $500 award 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.

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.

AARP/KRTA Grandparent Essay 2026-27

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 this form online at https://www.aarp.org/states/kentucky/ky-grandparent-essay-contest/
***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 the handwritten or digital essay to the local RTA contact

DO NOT MAIL THE ORIGINAL ESSAY TO THE AARP OFFICE. *CHECK WITH RTA CONTACT on how to send Essay.*

Unless notified otherwise, AARP Kentucky will mail certificates for the school winner and participating school directly to the school's 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, 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, visit GPE website https://www.aarp.org/states/kentucky/ky-grandparent-essay-contest/ AARP Program Coordinator: Christine Jackson, email cjackson@aarp.org, phone 502-520-1908

AARP Kentucky

KRTA KENTUCKY RETIRED TEACHERS ASSOCIATION

AARP/KRTA Grandparent Essay 2026-27

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 February 2nd:

1) Complete the form online at **https://www.aarp.org/states/kentucky/ky-grandparent-essay-contest/**
OR 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: FEBRUARY 2, 2027

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AARP Program Coordinator: Christine Jackson, email cjackson@aarp.org, phone 502-520-1908

AARP Kentucky

KRTA KENTUCKY RETIRED TEACHERS ASSOCIATION

2026-2027 KRTA / AARP Grandparent Essay Contest Information

See Essay Contest GUIDELNES for requirements and details

Level	*AARP Awards*	*Submission*	*Judging*	*Deadline*
School Winners	Certificate	Forms to AARP must be submitted ONLINE at website *(by teacher or coordinator)* Essays should NOT be sent to AARP *(essays are not required to receive certificate)*	5th grade teachers one winner per school	**15-Dec-26**
County Winners	Embossed framed Certificate	Forms to AARP can be submitted ONLINE at website **OR** sent via Email *(attachments must be clear & legible)* **OR** Forms can be sent via US mail Essays should NOT be sent to AARP *(essays are not required to receive certificate)*	RTA local President/Unit/Committee	**2-Feb-27**
District Winners	$100 + plaque	Forms and Essays to AARP can be sent via Email *(preferred - only clear, legible digital copies accepted)* **OR** Forms and Essays can be sent via US mail	KRTA District President/Officers/Unit/Committee	**2-Mar-27**
State Winner	$500 + plaque Expense-paid trip to KRTA Convention	State student winner, teacher, KRTA presidents/chairs will be notified and arrangements made to attend convention	Panel of KRTA officials and AARP staff, officials or volunteers	Winner announced early April
Teacher Winners	Two $250 gift card awards	Drawing to take place at KRTA convention and winning teachers announced and contacted	For all teachers of school winner submissions	KRTA Convention

Grandparent Essay Program website: *https://www.aarp.org/states/kentucky/ky-grandparent-essay-contest/*

Contact: Christine Jackson, AARP Email: *cjackson@aarp.org* Phone: (502) 520-1908

Mail to: AARP Kentucky, P.O. Box 910294, Lexington, KY 40591-0294

Q&A

Q: When does the KR TA membership year begin and end?

A: KRTA membership year begins July 1 and ends the following year on June 30.

Q: If l move out of state, can I still keep my KRTA membership?

A: Yes!

Q: If I relocate to another geographical area in Kentucky should I keep my membership in my previous local or join the local where I reside?

A: You may remain a member of the local where you retired or you ma join the local closest to you.

Q: If I return to teaching due to the lack of qualified teachers, will I need to stop my retirement from TRS? Will I be penalized through my health insurance?

A: Contact TRS of Kentucky 1-800-618-1687.

Q: On the local non-membership list what is the meaning of the symbols by a person's name?

A: "O" means they joined KRTA in the past but are not currently a member. "L" means they joined in the previous year, and they are not currently a paid member. Their membership has lapsed. No symbol by their name means they have never joined KRTA.

Q: What is KRTA NEWS and how are articles to be submitted?

A: The printed newspaper, KRTA News, provides members with valuable information in all areas of concern to retirees. KRTA prints 3 mail delivery issues a year in the first week of March, July, and November. There is also an electronic edition that is emailed to active members and is also available on the KRTA website (May and September). Beginning with 2006, archive issues are available on KRTA website www.krta.org. Any picture or logo submitted with an article must be an original and sent in digital format. Pictures cut from a newspaper cannot be used. Submissions must be emailed to brenda.meredith@krta.org.

Q: What are some ways to promote the local RTA in the community?

A:

• Create a Facebook page for your local.

• Contact your local newspaper and secure their requirements for articles you would like to submit i.e. photo format, meetings, events, and deadlines.

• Design and develop a quarterly local RTA newsletter. Make available electronically as well as a printed copy for members.

• Contact local media services with newsworthy events from your locals. I.e. Relay for Life, scholarship presentations, AARP Grandparent Essay winners, local member recognition, special awards, or projects within the local schools

Q: What can we do to celebrate new retirees?

A: • Have an ice cream social

• Have a luncheon or a dinner to honor the new retirees

• Have a picnic at one of the State Parks

• Pizza party

• Breakfast or brunch the first day of school

• "Officially Retired" Party

• Bonfire get-together

• Coordinate with local school board to collaborate a dual recognition dinner. (This would be a free meal for every retiree if sponsored by local RTA, and they join KRTA at the event. Invite someone from KRTA to be the speaker.)

Q: How do district and local RTA's honor their deceased educators?

A: Districts and locals have different types of memorial or celebration services for their deceased leaders and members.

The following is a list of what some districts and locals are doing:

• Observe a moment of silence

• Display pictures of the deceased on the table to celebrate each member.

• Light a candle for each deceased member

• Send an invitation to the family to attend the local memorial service.

• Invite local members to reminisce about the deceased with whom they worked.

• Invite former students to attend to share

• Give each family a rose or rose bush to plant

• Ask a colleague to write a tribute about the deceased member

• Keep a scrapbook or memory journal logging the deceased name, places taught, and content area.

• Keep information current by checking each issue of KRTA News printed and online editions.

• Terms you could use to describe this event are; Celebration of Life, A Time of Remembering, An Educator's Memorial

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 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

2025-26 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

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

• September 2026 • May 2027