



News

Express
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Kentucky Retired Teachers Association
Serving Retired Teachers Since 1957

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LOUISVILLE, KENTUCKY

JANUARY 2018

In Memory of Dr. Bob Wagoner

On January 9, 2018, Dr. Robert V. Wagoner passed away after suffering complications from the flu.

Bob was passionate about public education, helping students succeed, and advocating for Kentucky's retired teachers. He felt a duty to protect the folks who have given so much to the lives of students all across Kentucky. As all of you know, Bob had planned to retire December 31 from his position as Executive Director of KRTA, but he made it real clear with us all that he intended to continue to be involved in KRTA.

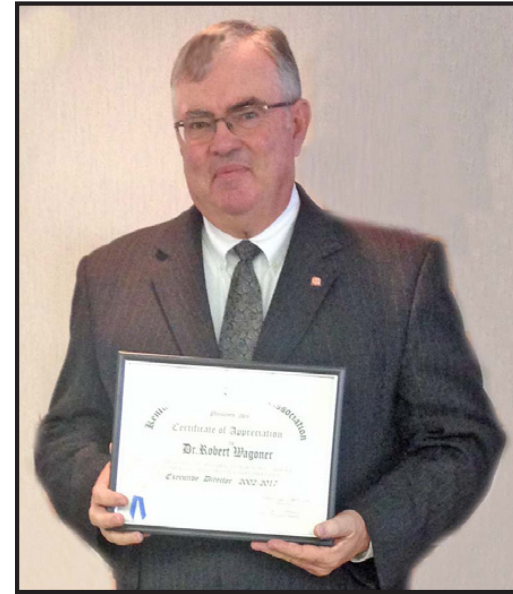
Bob didn't like to be the center of attention. He was always the guy in the back of the room. He was the grand puppet master behind the curtain pulling just the right strings for a successful outcome. He made everyone else look good and take the credit for something he himself had initiated and planned. He didn't seek accolades; he only cared about helping students, teachers, and acquaintances achieve success. I think he liked to be the smart guy behind the scenes but got great joy in pushing others to the front.

Bob had a presence. Bob was a man of few words when in a crowd or at a meeting with education leaders. When Bob spoke, it meant something. He didn't speak just

to be heard; he spoke to make a difference. That garnered respect from everyone. He was the go-to-guy in KY for school finance for many school superintendents and school finance officers. He was also the go-to-guy for many state legislators when it came to questions about teacher pensions.

Since Dr. Wagoner's passing the office has received hundreds of emails, phone calls, and social media messages on what he meant to them. Some of the content was about how he had been a mentor to them, how he had helped them get their school district's finances in order, how he had helped them launch or restart their careers, how he had taught them to do more with less, and how he had helped them through tough times in their lives. These emails and calls were not only from Kentucky, they were from all over the country as Bob was the go-to-person for establishing a successful statewide retired teachers' association.

One phone call came from a colleague who lives in the Washington D.C. area. Bob and Mary recently went with her family to a Washington Nationals baseball game. Bob told the boys that he likes to watch every game for the unexpected hero. He told them everyone watches for the big plays from the stars, but often it's



Dr. Bob Wagoner
KRTA Executive Director Emeritus
Certificate of Appreciation awarded December 4, 2017

a play from an unexpected hero that matters most—and that holds true in

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General Assembly Issue

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PERSONALLY SPEAKING . . .

2018 Kentucky General Assembly

Legislative Update

Wednesday, January 24 marked the 15th day of the 60-day 2018 General Assembly. It is one quarter of the way through the session, and we have not seen a pension bill. However, we continue to hear that one will be filed soon. Rumors abound concerning the number of pension bills that may be filed and their contents. The voice of KRTA members is vital as the session continues. Our emphasis remains the same as it has been for the last several months. 1) Maintain a defined benefit program for current and future teachers; 2) Maintain ALL retiree health insurance; 3) Maintain the Cost of Living Adjustment (COLA) for retired teachers; and 4) Maintain the current governance and operations of TRS.

The Governor's Budget proposal, now HB 200, has created quite a stir. While we applaud the administration for making the necessary contribution to TRS for this biennium, the elimination of state funding for retiree health insurance has many concerned about their financial well being. Our current understanding is that the proposal would affect retirees under the age of 65 who retired on or after July 1, 2010.

House Bill 540 (Shared Responsibility), enacted during the 2010 session of the General Assembly, changed how retired teachers' health insurance is funded. While access to group coverage for retired teachers is part of the Inviolable Contract, the details of that coverage are not—something reiterated in HB 540. By not making the state's contribution to retiree health insurance, the Governor is violating the intent of the Shared Responsibility Plan passed in 2010.

If no funding is provided under the budget that is ultimately enacted this session, under-65 retirees who retire on or after July 1, 2010, could end up paying more or all of the cost of their health insurance premiums.

It is IMPORTANT to note that the budget proposal is now in the House, and they will begin to make adjustments to the Governor's proposal. It is our hope many changes will be



Tim Abrams
Executive Director

made including fully funding retiree health insurance during the session, but your advocacy is needed.

Another item that is included in the budget proposal/HB 200 that affects some retired teachers is the elimination of the dependent subsidy for all retirees under age 65. The proposal specifically says, "Pursuant to KRS 161.675(4), health insurance supplement payments made by the retirement system shall not exceed the amount of the single coverage insurance premium."

To keep informed on the latest information pertaining to possible pension reform, visit our website at teachfrankfort.org. Make your voice heard in Frankfort. We ALL must continue to advocate for our earned benefits.

2018 SESSION SCHEDULE

Legislative: January 2–March 22

Concurrence Only: March 27–March 28

Governor's Veto Days: March 29–April 9

Final Legislative Days: April 12–April 13

2018 REGULAR SESSION LEGISLATIVE RECORD

To see all bills and resolutions filed, click on this link:

<http://www.lrc.ky.gov/record/18RS/record.htm>

You can learn the current status of any filed bill or resolution.

WHO'S MY LEGISLATOR

To find contact information for your Representative or Senator, click on this link <http://www.lrc.ky.gov/whoswho/county.htm> If you don't know who your Representative or Senator is, please call KRTA (1-800-551-7979) or email us at info@krtat.org for assistance.

KY GENERAL ASSEMBLY TOLL FREE NUMBERS

Legislative Message Line: 800-372-7181

Bill Status Line: 866-840-2835

Meeting Information Line: 800-633-9650

TTY Message Line: 800-896-0305

LRC WEB SITE <http://www.lrc.ky.gov>

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2018 KY GENERAL ASSEMBLY . . .

2018 Legislative Session Matt Bevin, Governor Jenean Hampton, Lt. Governor

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Senate Officers and/or
Committee Chairs are subject to
change when the Session begins.

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KRTA Member Participation: Contacting Your Legislators

It is important that KRTA members help keep their legislators informed. Legislators need to know your thinking on those issues upon which decisions will be made, and the facts on which such thinking and conclusions are based. As a KRTA member, you can help ensure good legislation concerning retired teacher issues on state and national levels by communicating with your elected representatives at the proper time. Personal contacts can be a meaningful way to influence a legislator.

Points to remember when approaching an elected official:

- 1. Build a relationship** with your state elected officials and their aides; this takes time (attend fund raisers, town meetings, etc.)
- 2. Be brief and be prepared**—take the time to read all available background material
- 3. Know the issues**—pros and cons
- 4. Be honest**—the primary goal of your visit is to express your concern over a particular bill or issue
- 5. Be polite and specific** (we all need to agree to disagree) it is generally advisable not to get into arguments; don't demand a commitment before the facts are in
- 6. Be constructive**—give reasons for your position, explain how the issue would affect you, your family, or profession, or the effect on your community, on our state; if you want to suggest amendments to a bill that has been introduced, it is important that you have:
 - a) a clear idea of what you want to be included or deleted;
 - b) the reasons to justify the proposed change; and
 - c) good, strong facts to back up your position before you contact your legislator.
- 7. Limit handouts** unless you are asked for more information—do not “overkill,” stick to the issues that you came to discuss; don't wander into other issues
- 8. Work with staff**—No legislator can be an expert on everything.
- 9. Praise past efforts and listen** to their issues without interrupting—they often have input from many resources to which you may not have access
- 10. Follow up a visit with a note** thanking them for their time and for listening to your point of view
- 11. Thank your legislator(s) for his/her vote.**



2018-19 LEGISLATIVE PROGRAM

As KRTA members work to preserve the Teachers' Retirement System of Kentucky (TRS) these points are important to remember.

- Retired teachers are not covered by Social Security. There is no financial safety net for Kentucky's retired teachers.
- TRS was established in 1938 because Kentucky's retired teachers were not permitted by the Social Security Administration (SSA) to participate in the Social Security program.
- Approximately 52,000 retired teachers, beneficiaries and survivors receive annuity payments each month. Over 89% of these recipients live in Kentucky.
- Over \$1.55 million in annuity payments are distributed monthly providing a significant positive economic impact on all of Kentucky's local communities. Historically, approximately 70% of these payments come from TRS' diverse, conservative investment earnings.
- All public school educators must participate in TRS.

ITEM I: SUPPORT LEGISLATION THAT WOULD IMPROVE THE ACTUARIAL SOUNDNESS OF TRS.

COMMENT: The 2018-19 biennial budget should contain the full Annual Required Contribution (ARC).

ITEM II: KEEP THE TRS BOARD OF TRUSTEES AS IT IS PRESENTLY CONSTITUTED AND OPPOSE EFFORTS TO TAKE FIDUCIARY DECISIONS AWAY FROM THE TRS BOARD.

COMMENT: The Board of Trustees, acting as a semi-independent state agency, has a record of 78 years of successful management that is unsurpassed in state government. Presently, TRS is ranked in the top 25% nationally in public pension fund investment returns. The current trustee election process has served the best interest of Kentucky's public school teachers and retirees for many years with marked success. The Board of Trustees (a majority of whom are elected by active and retired teachers) employs experienced, competent investment consultants to advise them on all matters pertaining to investments and its fiduciary responsibilities.

ITEM III: MAINTAIN TRS AS A DEFINED BENEFIT GROUP RETIREMENT PLAN FOR ALL KENTUCKY PUBLIC SCHOOL TEACHERS.

COMMENT: A retiree cannot outlive his/her pension under a Defined Benefit (DB) Group Retirement plan, unlike a Defined Contribution (DC) Individual Savings account even with a Social Security safety net. Since Kentucky's retired teachers do not have a Social Security safety net, it is vital that our DB group retirement plan continue. Also, research shows that DC plans are as much as 46 percent more costly than DB plans.

ITEM IV: PROMOTE FULL FUNDING OF TRS' ANNUITY AND MEDICAL INSURANCE FUNDS.

COMMENT: Full funding in a timely manner is required to keep the annuity fund in sound fiscal condition. Maintaining the medical insurance fund per HB 540 (Shared Responsibility [enacted in 2010]) requirements is essential to the financial well being of our members. TRS members are meeting their Shared Responsibility (HB 540) obligations. The Shared Responsibility plan is a national model for retiree health care funding.

ITEM V: OPPOSE STATE TAX REFORM LEGISLATION THAT UNFAIRLY BURDENS KENTUCKY'S PRIVATE AND PUBLIC SECTOR RETIREES.

COMMENT: Cutting retirement income by raising the amount of retirement income (all income over \$15,000) subject to state income tax,

or reducing tax exemptions or increasing tax rates on Social Security income would be ill-timed and would unfairly burden Kentucky's current retirees, who have no time to pivot their retirement strategy.

ITEM VI: SUPPORT LEGISLATION REQUIRING LONG-TERM CARE (LTC) INSURANCE CARRIERS TO SUBMIT RATE INCREASES TO THE ATTORNEY GENERAL, AS WELL AS THE DEPARTMENT OF INSURANCE, AND ALLOW INTERVENTION BY THE ATTORNEY GENERAL.

COMMENT: During the past nine (9) years, the Kentucky Department of Insurance (KDOI) has permitted huge rate increases (i.e., 111%) by long-term care insurance carriers. The increases are intolerable for individuals on fixed incomes. Unlike auto and homeowner policy holders, LTC policy holders do not have an option to change insurance companies. Copies of requests for other insurance proposed rate increases are forwarded to the Attorney General's Office when filed with the KDOI.

ITEM VII: SUPPORT AN INCREASE IN THE AMOUNTS PAID TO SURVIVORS OF ACTIVE CONTRIBUTING MEMBERS AND DISABILITY RETIREES.

COMMENT: Benefits paid to survivors of active teachers and disability retirees have not been increased for over eight years and have not kept pace with inflation. Special attention should be paid to the plight of teachers who become disabled in the line of duty (i.e., Fred Capps Memorial Act) with fewer than 27 years of service.

ITEM VIII: OPPOSE EFFORTS AT THE FEDERAL LEVEL TO IMPOSE MANDATORY SOCIAL SECURITY ON TRS MEMBERS AND SUPPORT REPEAL OF THE WINDFALL ELIMINATION PROVISION (WEP) AND THE GOVERNMENT PENSION OFFSET (GPO) PENALTIES.

COMMENT: If TRS contribution rates are reduced by 12.4% so that the combined TRS and social security rate is maintained at the present level, the benefit actuarial formula for active teachers would have to be reduced from 2.5% to less than 1.0%. The result would greatly reduce overall benefits for current and future teacher retirees. The WEP and GPO penalties are particularly harmful to individuals who make a mid career decision to become a teacher in Kentucky.

ITEM IX: SUPPORT THE 2018-19 LEGISLATIVE PRIORITIES OF THE NRTA/AARP STATE LEGISLATIVE COMMITTEE AND/OR OTHER GROUPS REPRESENTING SENIOR CITIZENS, WHICH ARE NOT IN CONFLICT WITH THE POSITION OF KRTA.

COMMENT: Supporting issues of particular interest to retired teachers such as retirement security, predatory lending, increased home and community-based health and living services, and long-term care regulations benefit our members.

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Under 65 (KEHP) Anthem BCBS 844-402-KEHP

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(Continued from Page 1)

sports and in life. So now the boys always look for the unexpected hero in games and their mother reminds them to do it in their day-to-day lives. She said that lesson from Bob will always stay with her family. Bob was an unexpected hero—quiet and behind the scenes, but he sure made a difference.

Bob Wagoner was probably the most intelligent, caring, honest, and giving person I have ever met. Bob had a lot of plans for his retirement; but because of his untimely death, those plans will never be realized. The influence of Dr. Bob will live on through the countless lives of children, educators, and friends he touched through his hard work, compassion, and leading by example. The work he did will live on.

He planned to focus his attention on fully establishing the Kimbler-Bourgard Foundation. This non-profit fund which Dr. Wagoner re-established in 2015 will provide emergency assistance to retired educators experiencing difficult times and provide scholarships to students attending Kentucky's community colleges.

Please help us fulfill Dr. Bob's goal by making a tax deductible donation in his memory.

Make checks payable to Kimbler-Bourgard Foundation* and mail to :

KRTA
7505 Bardstown Road
Louisville, KY 40291-9978

*The Kimbler-Bourgard Foundation is a non-profit fund.

Together We Can Have Continued Success

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