

MRTA Unit President Handbook

I'm a Unit President, now what do I do?



**Missouri Retired Teachers Association
and Public School Personnel**

www.mrta.org

1-877-366-6782

mrta@mrta.org

March 2024

Table of Contents

What is MRTA?.....	4
Where do I start?	5
MRTA Organizational Chart.....	6
Regional Leaders Organizational Chart.....	6
MRTA State and Regional Leadership.....	7
MRTA Regional Map.....	8
MRTA Unit Listing.....	9
MRTA State Office - Contact Us.....	10
Communicating with MRTA/Available Resources.....	11
StateOffice-LocalUnitRelationship.....	12-13
UnitMeetings.....	14
Succession Planning.....	15
MRTA Calendar of Events.....	16
MRTA Committees.....	17
Membership Committee.....	18-24
Legislative Committee.....	25-29
Retirement Education Committee.....	30-36
Community Service Committee.....	37-38
Informative & Protective Services Committee.....	39-40

Forms

Local Unit Officer Report.....	42-44
I.R.S. Reporting Form.....	45-47
Unit of Excellence.....	48-51
CashForClassrooms.....	52-57
Distinguished Retiree Program.....	58-61
Sample By-Laws.....	62-65
History.....	67-70
MRTF.....	72
AmazonSmile MRTF Donations.....	73
MRTF Classroom Grant Application.....	74-75
Maggie Elder Memorial Grant.....	76-77

Welcome!

Congratulations on being elected President of your MRTA Unit! You may be wondering where do I go from here? Who is here to help me? What do I do first? The MRTA state office has put together the following information in an attempt to help guide you down the path of Unit Presidency as well as provide helpful tips along the way and even a little inspiration, we hope!

So join us as we explore what MRTA is, our history, our goals and vision. It is not stated enough, but YOU are the secret to MRTA's success. You are key in to help us protecting pensions of retired educators in the great state of Missouri!

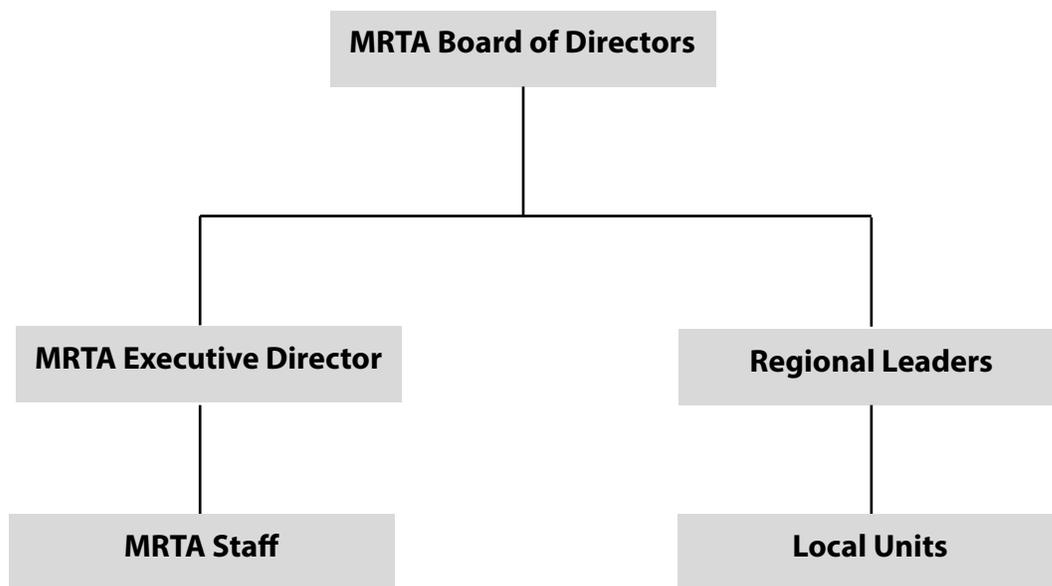
What is MRTA?

MRTA is a not-for-profit 501(c)(4) organization. MRTA was organized in 1960 and is the only organization where the Missouri public education retiree is the #1 priority! MRTA is independent, nonpartisan, and does not endorse candidates.

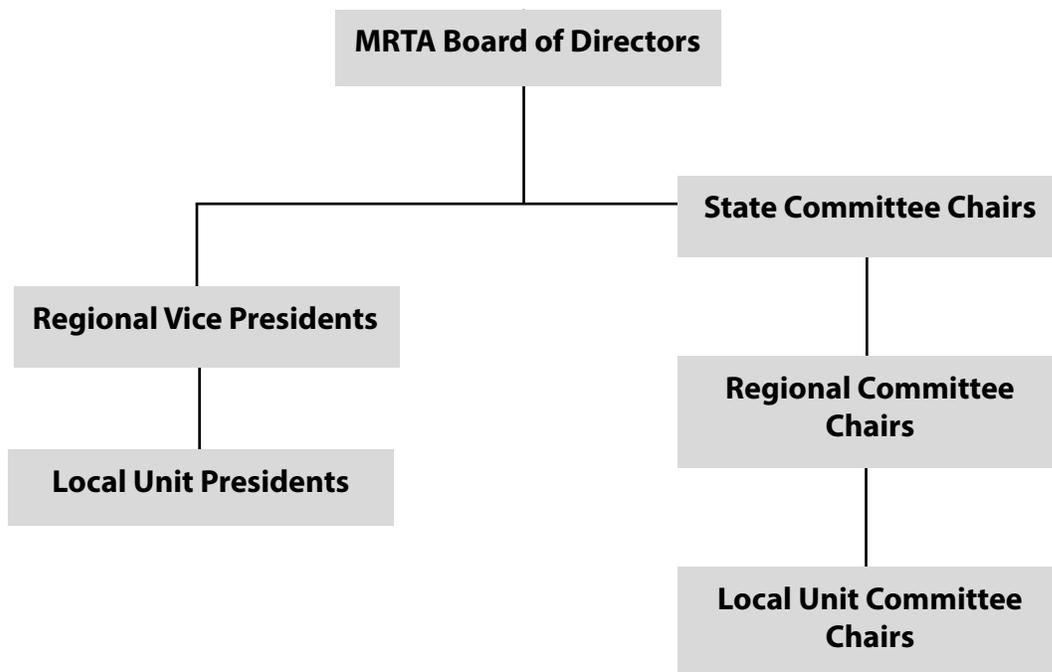
MRTA works through a grassroots approach to lobbying and with membership in the Association! "Strength in Numbers" is our key to success! We rely on our members to make phone calls, email, write, and visit their legislators! We also take this approach to membership! We need each and every member to spread the word about MRTA! It is through our Local Units and members that we see the most success in all facets of the organization.

MRTA is the statewide organization that is the umbrella over 148 Local Units throughout Missouri. We provide assistance to MRTA Units in many ways. This booklet will tell you all about the resources available to you. As stated earlier, MRTA is a grassroots organization; we need our MRTA Units and our MRTA Units need us!

MRTA Organizational Chart



Regional Leaders Organizational Chart



The MRTA Board of Directors

The MRTA Board consists of 26 members.

Elected Officers

President - Maureen Hacker
President Elect- Gale "Hap" Hairston
Vice President - Georgia White
Immediate Past President - Martha Schatz
Treasurer - Julia Platt
14 Regional Vice Presidents - See Pg. 9

Appointed Officers

Membership Committee Chair - Idella Warden
Legislative Committee Chair - Randy McClain
Community Service Committee Chair - Marlin Kinman
Retirement Education Committee Chair - Richard Phillips/Dave Baker
Informative & Protective Services Committee Chair - Linda Lueckenhoff
MRTF President - Karen Miller

MRTA Elected Officers

**President Elect
Maureen Hacker**



**President Elect
Dr. Gale "Hap" Hairston**



**Vice President
Georgia White**



**Past President
Martha Schatz**



**Treasurer
Julia Platt**



Regional Committee Chair

There are five Committees within the organizational structure of MRTA: the Legislative Committee, Membership Committee, Community Service Committee, Retirement Education Committee, and the Informative and Protective Services Committee.

The Regional Vice President is responsible for appointing Regional Committee Chairs to serve their respective region. Terms are for three years. The Regional Committee Chair is responsible for communicating with the Local Unit Committee Chairs.

Each MRTA Committee consists of 14 Regional Committee Chairs, one of whom is appointed by the MRTA State President to serve as the State Committee Chair. The five State Committee Chairs are also voting members on the MRTA Board of Directors.

State Committee Chairs

**Membership
Idella Warden**



**Legislative
Randy McClain**



**Community Service
Marlin Kinman**



**Retirement Education
Dr. Richard Phillips**



**Retirement Education
Dr. Dave Baker**



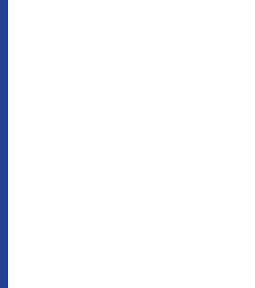
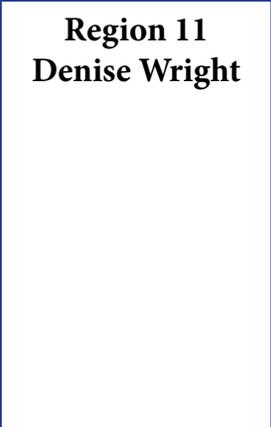
**Informative & Protective
Services
Linda Lueckenhoff**



MRTA Regional Vice Presidents

The MRTA Regional Vice President is the link between MRTA at the state level and the Local Unit. Regional Vice Presidents serve 3 year terms and are elected by their respective region's members at MRTA Delegate's Assembly. They serve on the MRTA Board and are the voice of the Region on the state level.

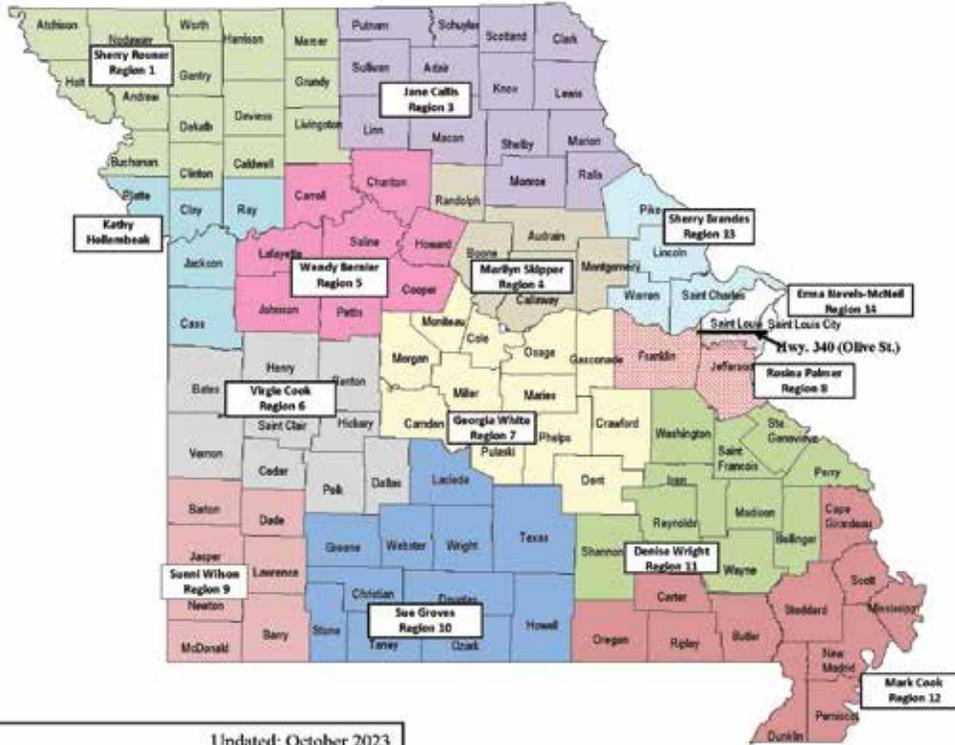
There are 14 MRTA Regional Vice Presidents one for each MRTA Region, please see MRTA Regional Map on the next page.

Region 1 Sherry Rouner 	Region 2 Cathy Hollembeak 	Region 3 Jane Callis 	Region 4 Marilyn Skipper 	Region 5 Wendy Bernier 
Region 6 Virgie Cook 	Region 7 Georgia White 	Region 8 Rosina Palmer 	Region 9 Sunni Wilson 	Region 10 Sue Groves 
Region 11 Denise Wright 	Region 12 Mark Cook 	Region 13 Sherry Brandes 	Region 14 Erma Nevels - McNeil 	



Interested in Local Unit meetings?

If you would like to find out more about Local Units
contact your Regional Vice President.
Full unit listing on reverse.



MRTA Regional Vice Presidents

Region 1

Sherry Rouner
McFall
417-466-6456
srouner@gmail.com

Region 5

Wendy Bernier
Warrensburg
660-864-9609
wendybernier50@gmail.com

Region 9

Sunni Wilson
Mount Vernon
417-413-4987
sunnirae@wilsonia.net

Region 13

Sherry Brandes
Marthasville
636-359-3444
sherry137@centurytel.net

Region 2

Kathy Hollembeak
Blue Springs
816-718-9685
kahollembeak@yahoo.com

Region 6

Virgie Cook
Clinton
660-924-3014
vircook@embarqmail.com

Region 10

Sue Groves
Springfield
417-860-7970
suegroves@msn.com

Region 14

Erma Nevels - McNeil
Hazelwood
314-731-7098
erma.nevels@att.net

Region 3

Jane Callis
Paris
573-473-7719
ajcallis01@gmail.com

Region 7

Georgia White
Richland
573-765-2988
g44white@embarqmail.com

Region 11

Denise Wright
Farmington
573-760-6036
dwright1079@sbcglobal.net

Region 4

Marilyn Skipper
Ashland
573-673-8767
marilyskipper45@gmail.com

Region 8

Rosina Palmer
St. Louis
314-550-0341
rosinap59@gmail.com

Region 12

Mark Cook
Cape Girardeau
573-576-5216
obrother69@gmail.com



MRTA Unit Listing

<p>Region 1 Andrew Co. Atchison/Holt Caldwell Co. Clinton Co. Daviess Co. D.C. United Co. Grundy/Mercer Co. Harrison Co. Livingston Co. Nodaway Co. St. Joseph</p> <p>Region 2 Belton Blue Springs Cass Co. Clay Platte Co. Fort Osage Grandview Independence Kansas City Lee's Summit Liberty Lone Jack, Oak Grove, Grain Valley (LOV) Ray Co. Raytown</p> <p>Region 3 Kirksville Lewis Co. Linn Co. Macon Co. Marion/Ralls Monroe/Shelby Scotland Co. Sullivan Co.</p>	<p>Region 4 Audrain Co./Mexico Boone Co. Callaway Co. Montgomery Co. Randolph Co.</p> <p>Region 5 Carroll Co. Chariton Co. Cooper Co. Howard Co. Johnson Co. Lafayette Co. Saline Co. Sedalia Community State Fair C. C.</p> <p>Region 6 Benton Co. Dallas Co. Henry Co. Hickory Co. Polk Co. Sac Osage St. Clair Co. Stockton Lakers Vernon Co. West Central</p> <p>Region 7 Camden Co. Central MO Cole Co. Crawford Co. Miller Co. Maries/Gasconade Moniteau Morgan Phelps Co. Pulaski Co.</p>	<p>Region 8 Franklin Co. Jefferson Co. Kirkwood Lindbergh Mehlville Spec. School Dist./ St. Louis Suburban</p> <p>Region 9 Barry Co. Barton Co. Carthage Dade Co. Lawrence Co. McDonald Co. Newton Co.</p> <p>Region 10 Christian Co. Douglas/Ozark Co. Laclede Co. Republic South Central Springfield Texas Co. Tri Lakes Webster Co. Wright Co.</p>	<p>Region 11 Iron Co. Madison Co. Mineral Area Perry Co. Reynolds Co. Ste. Genevieve Washington Co.</p> <p>Region 12 Bootheel Butler Co Cape Girardeau Carter Co. Ripley Co. SEMO Stoddard Co.</p> <p>Region 13 Daniel Boone Lincoln Pike St. Charles</p> <p>Region 14 Pattonville St. Louis City</p> <p>*Plans to start a Unit soon.</p>
---	--	--	--

The MRTA State Office

The MRTA State Office Facility is located at 3030 DuPont Circle, Jefferson City, MO. This building was completely paid for by donations and the mortgage was burned in just under two years. This office is YOUR building, you are free to hold meetings or take a tour of the facility. We would love to have you visit!



Contact Us Directly

Toll-Free: 1-877-366-6782

mrta@mrta.org www.mrta.org

3030 DuPont Circle, Jefferson City, MO 65109

Fax: 573-634-4273

MRTA Office Staff -



MRTA Executive Director

Maria Walden
mariawalden@mrta.org



**MRTA Assistant Director/
Communications Specialist**

Sarah Hoeller
sarahhoeller@mrta.org



MRTA Membership Coordinator

Paige Holtmeyer
paigeholtmeyer@mrta.org



**MRTA Legislative / Accounting
Specialist**

Ryan Mankin
ryanmankin@mrta.org



MRTA/MRTA Administrative Assistant

Morgan Piening
morganpiening@mrta.org

Communicating with MRTA - **Available Resources**

MRTA Newsletter - The Watchdog Report

The MRTA Newsletter is a 16 page print newsletter that is mailed to all dues paid members 2-3 times a year.

MRTA E-Newsletter

The MRTA E-Newsletter is a 4 page electronic newsletter that is emailed to all dues paid members who have provided us with an email address, up to 10 times a year, usually the third week of each month.

MRTA Emails

MRTA sends emails to all members who have provided an email address. During the Missouri Legislative Session we send them even more frequently if there is a piece of legislation that will affect retired educator pensions or public schools. Sometimes these emails require immediate action by the recipient. We call these emails **“Calls to Action.”** These emails contain information along with a request for further action. There are also times we will send an email to Local Unit Presidents and ask you to forward it to your members, please take the liberty to send any email we send you to your members. Many of you have members who may not have joined MRTA but we still need their help to make contact with state legislators on occasion. Please ask them to join us in our efforts. As we stated earlier, we are a grassroots organization and we depend on our members to spread the word!

MRTA Website

The MRTA website, www.mrta.org, contains a lot of information you can will find useful. It is your best resource for current information and any forms you may need. Below are a few tabs you may find most helpful.

- Unit Resources - this tab includes information on upcoming events we would like you to attend, any forms you may need, as well as, many resources on improving your Unit.
- Committees - this tab includes information for all five MRTA Committees. It is a great resource for your Committee Chairs if they need information for a report at your Local Unit Meeting.
- Home Page - the front page of the website, or home page, includes the latest MRTA news and also includes links for members to join or renew their membership, information on how to find their elected officials and a link to join our e-mail list.

MRTA Facebook Page

Like us on Facebook! You can easily “like” us by clicking the Facebook logo at the bottom of any of our emails. We post all vital information on Facebook as well as information we think you may find interesting or useful. It’s a great way to keep up with us!

MRTA Phone2Action

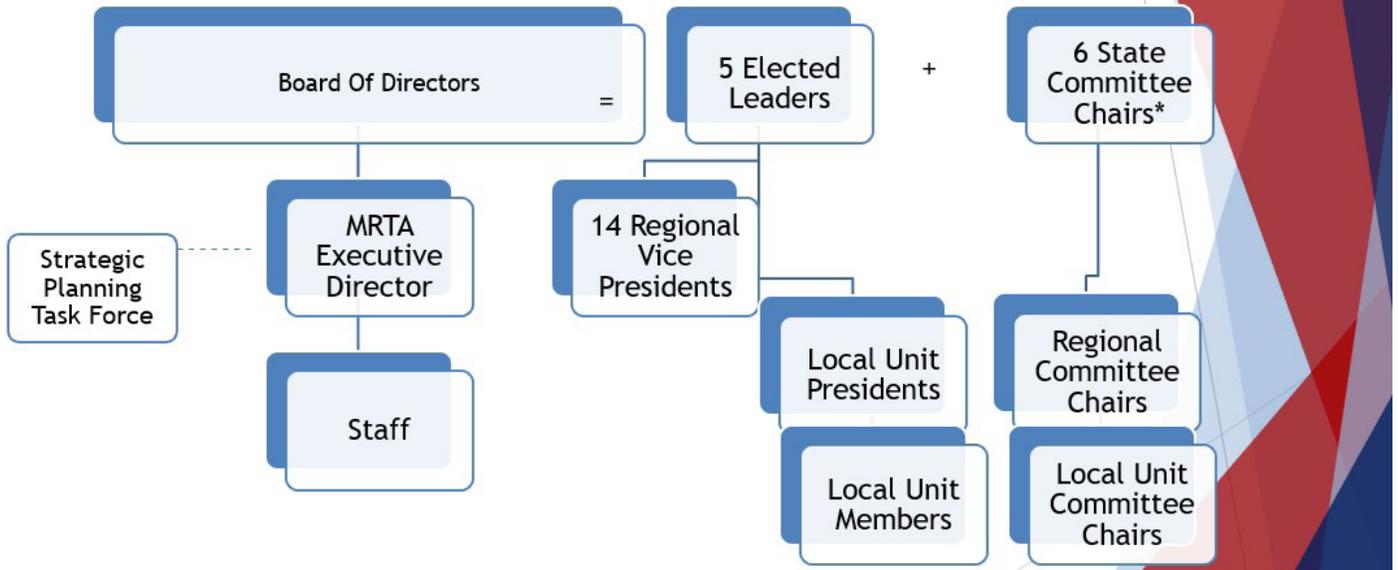
We need you to continue to be “Virtual Activists.” To make this easier for you we are offering MRTA Phone2Action.

With MRTA Phone2Action, you can now sign up to have all of our Legislative Updates sent straight to your phone. PLUS, we have made it easier to write your legislators. With Phone2Action you can now write your legislators with just a few taps on your smartphone! Text MRTA to 52886 to get started.

MISSOURI RETIRED TEACHERS ASSOCIATION AND PUBLIC SCHOOL PERSONNEL

STATE OFFICE – LOCAL UNIT RELATIONSHIP

MRTA Organizational Chart with By-Law Change



An association is an organization of people with a common purpose. Therefore, an organization such as MRTA cannot achieve its common purpose to benefit its people (members) if its component parts (local units) go any direction they please.

The Missouri Retired Teachers Association and Public School Personnel (MRTA) is a unique organization in that the MRTA ByLaws state in Article IV Organization, Section 3, "The local Unit shall be governed by its own bylaws/ constitution in cooperation with the State Association and shall retain local dues." Interpreted literally, this could be taken to mean that local units are free to conduct business without regard to the state office or Board of Directors; however, it must be recognized that the local units are creations of and have their existence out of the organization of the state association. Consequently, the concept of autonomy and independence cannot supersede the state organizational principles. The goal of this organizational effort is to balance the organizational needs of the state with the appropriate level of autonomy for local units to function efficiently.

Effective organizations are composed of interdependent and coordinated parts that have common goals. All of the parts must cooperate and function as a coordinated whole within the framework of approved programs that provide a healthy degree of uniformity. In an effort to provide a degree of uniformity and direction toward the association goals for all MRTA units, the following framework is called for in Article IV of the MRTA Bylaws as follows:

State Office – The state office is the administrative headquarters of the association. It is staffed by an Executive Director, acting as the chief officer of the association, and appropriate staff. The state office is responsible for the day-to-day activities of the association and the implementation of policies and programs as approved by the Board of Directors.

MRTA Regions – MRTA is divided into 14 regions determined geographically by counties. These geographic units take into consideration major metropolitan areas, urban areas and rural counties. Each Region elects a Regional

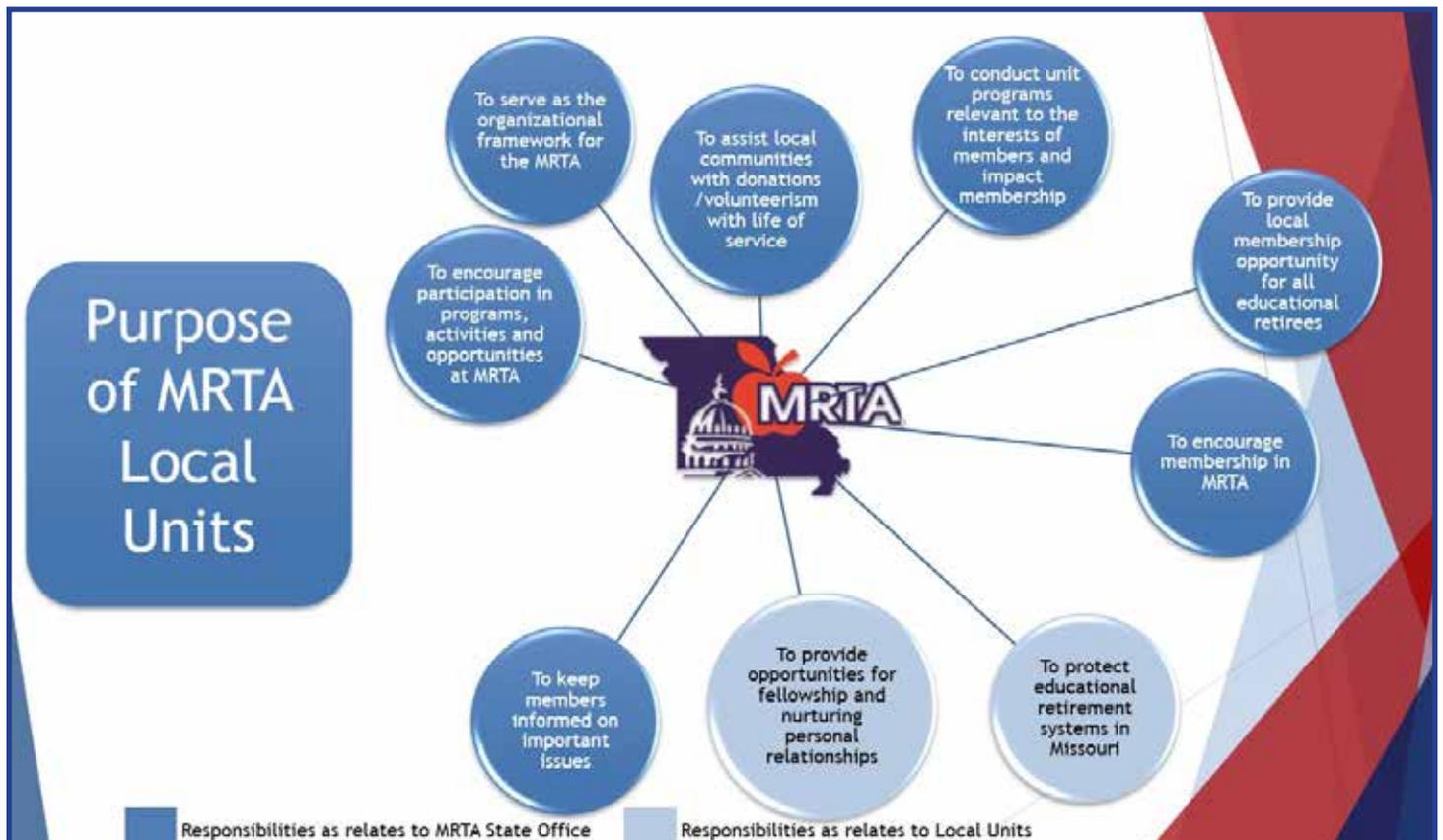
Vice President who is a voting member of the state office Board of Directors. Each Regional Vice President is the main point of contact between the state office and the Local MRTA Units.

Local Units – The MRTA recognizes 125 local units. The organizational components of the local units are authorized for creation under Article IV, Section 3 of the MRTA Bylaws. They are responsible for the execution of the state ByLaws as well as the organizational and program recommendation of the Board of Directors.

In addition to the relationship with the state, local units play a broader role in serving the needs and interests of education retirees. The comprehensive nature of their role is reflected in the following purposes:

PURPOSES OF MRTA LOCAL UNITS

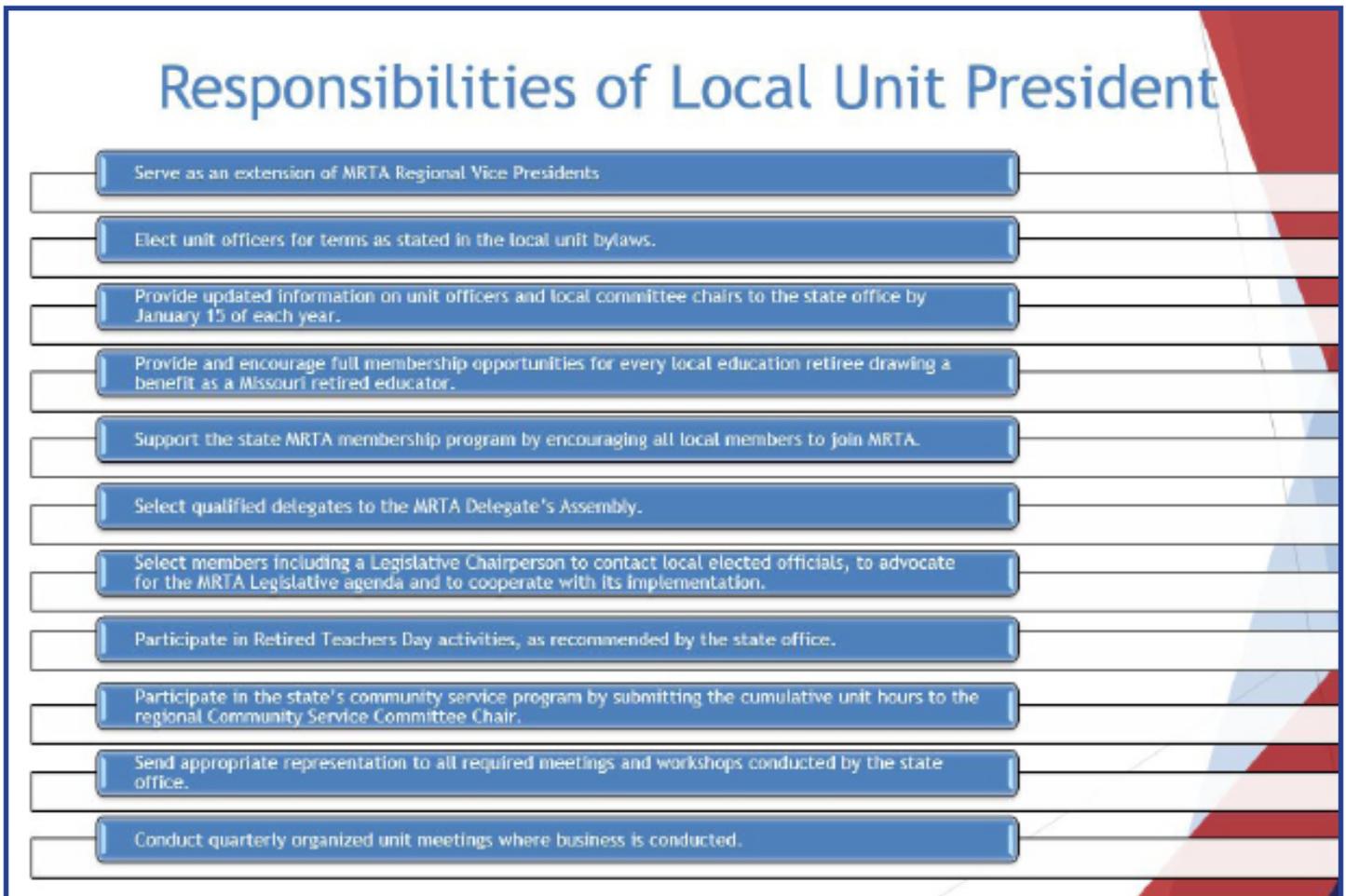
- To serve as the organizational framework for the Missouri Retired Teachers Association and Public School Personnel.
- To provide a local membership opportunity for all education retirees and to encourage membership in MRTA.
- To conduct unit programs relevant to the interests of members and enhance attendance.
- To encourage participation in the programs, activities, and opportunities of MRTA.
- To serve as the backbone of efforts to protect the PSRS-PEERS Retirement System, PSRS of Kansas City, MO, PSRS of the City of St. Louis, and to protect and preserve all public educator retirees' current benefits.
- To provide opportunities for education retirees to continue a life of service to their fellow retirees, their active colleagues, and their communities.
- To keep members informed on important consumer issues affecting personal safety, health and general welfare of retirees.
- To provide opportunities for fellowship and the nurturing of personal and professional relationships.



LOCAL UNIT RESPONSIBILITIES FOR STATE PROGRAMS

Specifically, local units are urged to comply with and support the following purposes:

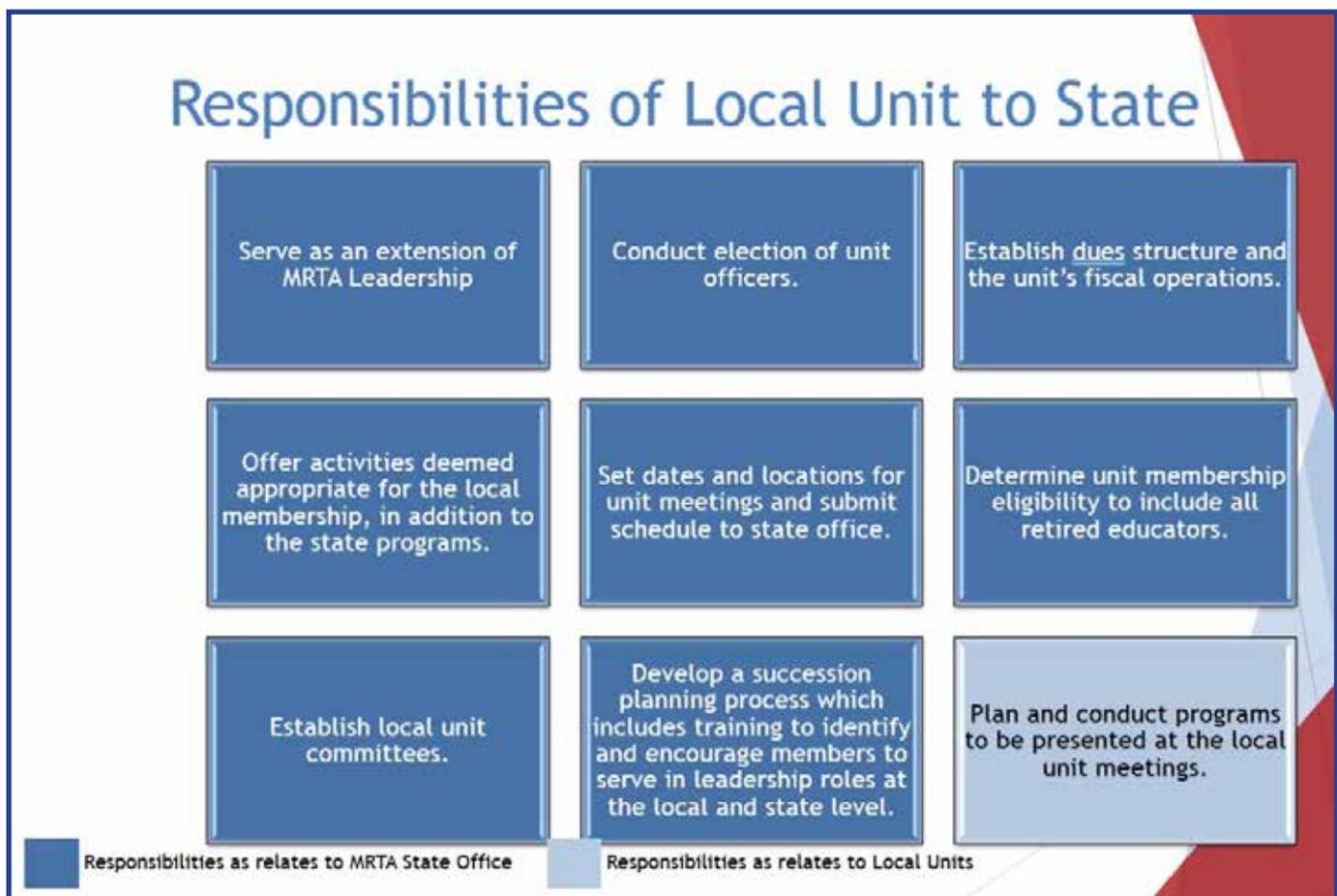
- Elect unit officers for terms as stated in the local unit bylaws.
- Provide updated information on unit officers and local committee chairs to the state office by January 15 of each year.
- Provide and encourage full membership opportunities for every local education retiree drawing a benefit as a Missouri retired educator.
- Support the state MRTA membership program by encouraging all local members to join MRTA.
- Select qualified delegates to the MRTA Delegate's Assembly.
- Select members including a Legislative Chairperson to contact local elected officials, to advocate for the MRTA Legislative agenda and to cooperate with its implementation.
- Participate in Retired Teachers Day activities, as recommended by the state office.
- Participate in the state's community service program by submitting the cumulative unit hours to the regional Community Service Committee Chair.
- Send appropriate representation to all required meetings and workshops conducted by the state office.
- Conduct the minimum number of four organized unit meetings where business is conducted. In an effort to support MRTA's programs, the local unit meetings should be scheduled throughout the year to coincide with the approved MRTA programs.



LOCAL UNIT DUTIES FOR STATE PROGRAMS

In cooperation with the state office, the local units are responsible for creating guidelines in the following areas:

- Conduct election of unit officers.
- Establish dues structure and the unit's fiscal operations.
- Offer activities deemed appropriate for the local membership, in addition to the state programs.
- Set dates and locations for unit meetings and **submit schedule to state office**.
- Determine unit membership eligibility to include all retired educators.
- Establish local unit committees.
- Develop a succession planning process which includes training to identify and encourage members to serve in leadership roles at the local and state level.
- Plan and conduct programs to be presented at the local unit meetings.



Where do I start?

What are the goals and duties for Unit Presidents? The basic reason MRTA units exist is to help breakdown what MRTA does down into smaller more manageable sections. Your regional leaders (Regional Vice Presidents and Regional Committee Chairs) are there to help your unit coordinate activities to help fulfill MRTA's goals. Below are a few basic places to start.

Unit Officer Report

First things first, please take the time to fill out a Local Unit Officer Report and mail it to the MRTA office. We cannot stress enough how important this is, without this document we will not know who your Unit's leaders are or who to contact within your Unit. You can find a copy on the MRTA website, www.mrta.org or on page 43 of this handbook. Fill it out and make sure to keep a copy for yourself or for your successor.

This document is also very helpful on a Local Unit basis, your Unit members can use it as a guide for contacting your Unit Leaders.

MRTA Tip - succession training is always a GREAT idea! Keep this handbook, make notes in it and pass it down to your successor.

Unit of Excellence

Next, a great resource is the Unit of Excellence. The MRTA Unit of Excellence program is a voluntary program that is designed to help guide and direct local unit leaders, as well as, recognizing MRTA units that are going above and beyond the call of duty. Through the years, local unit leaders have found the guidelines to be a valuable tool in the management of their unit. To receive this award, a local unit must answer, "yes" to 25 of 28 questions.

We encourage all Units to become an MRTA Unit of Excellence each and every year. Please feel free to contact your Regional Vice President for assistance and to answer any questions you may have.

You can find the Unit of Excellence application on page 49 of this handbook.

Find Out About Our Next Training Session

We hold training sessions for our Unit Leaders in March of each year, we call these Unit President Summits. We will mail to your Unit, usually in early January, to notify you of the upcoming dates and also enclose the forms you need to send in to attend. These dates are planned usually over a year in advance so please visit our website and check our Events tab for the future dates.

These meetings are great for Unit Presidents to learn about MRTA and gain tools and knowledge that will help create a successful Local Unit.

Where do I go from here?

Enclosed in this Handbook are many resources to help you along the way. Don't forget you also have other resources as well as your Regional Vice President and the MRTA office staff. You are never alone. In the following pages we have also included information for all of your committees. Some of this information and some forms will need to be changed each year but this information is always available on our website and/or from the MRTA office.

Unit Meetings

MRTA isn't going to tell you how to run your Local Unit meetings, we have learned that different approaches work for different Units. You may already have great Unit meetings with great attendance, if you find yourself in that situation, great, give yourself a pat on the back! If you find your Unit's membership and attendance dwindling, look at your meetings and answer the next couple questions:

Where are you meeting? _____

Did you answer a nursing home, a senior center or a church? While these are great locations for meetings, especially if you live in a rural area where that is all that is available, put yourself in the shoes of someone who just retired. Think about their mind set. Do you think maybe they would enjoy meeting somewhere that is a little more fun?

What are your programs like? Do you have programs or just reports? _____

While reports are important and we hope you are disseminating information, we find it isn't necessary to spend the whole meeting with business reports. During Legislative Session why not invite your State Representative or State Senator? Ask them to talk about current issues. Invite interesting speakers or presenters. Have a destination meeting! Take a day trip as a Unit! Decorate the room and have a fun themed meeting!

When do you hold your meetings? _____

Did you answer 2 p.m. on a Tuesday? While being consistent with dates and times is easier for many, you have to remember that many new retirees are still working part time and cannot always attend a day meeting. Why not consider having a few dinner meetings?

Do you invite new retirees to come to your meetings or to join your Unit? _____

We get calls from MRTA members all the time asking why they have not been contacted by their local Unit. Why not ask MRTA for a list of MRTA members in your area? In April of each year we ask Units to get the new retiree lists from the schools in their areas, if you get the list please mail us a copy and keep a copy for yourself. Then send them an invitation to an upcoming meeting, keeping in mind a lot of retirees are not immediately interested in joining but will after a few years of retirement. Maybe follow up with a request next year?

Are you engaging your members with volunteer opportunities? _____

More than 60% of people over 50 volunteer when asked. Ask members to participate in an MRTA Community Service project or have your own fundraiser, service project or food drive within your community. It's a good opportunity to get publicity in your newspaper while helping out your community and getting members engaged and involved.

Are you rewarding, celebrating or appreciating your members? _____

Why not celebrate member's personal life accomplishments? Thank members for participating in a project within your Unit, welcome and introduce new members. Consider name tags and maybe greeters at the door welcoming members. Everyone likes to feel appreciated and welcome!

Are you having fun? _____

Not every meeting has to be a fun party but don't forget to keep things fresh and fun when you can!

By providing a variety of activities, speakers, programs and volunteer opportunities you help provide something for everyone.

Succession Planning

Succession planning is key to the success of a Unit. We have, in the past, had several Units who disbanded because all their members were aging, no one wanted to take over leadership roles and those who finally accepted the role didn't know what their role entailed or what they should do. You may even feel this way if you are a new Unit President in a Unit that is not participating in succession planning.

What is succession planning? Succession planning is a process for identifying and developing internal people with the potential to fill key leadership positions in an organization. Succession planning increases the availability of experienced and capable people that are prepared to assume these roles as they become available.

How do you begin the process?

First involve others! Appoint a committee of members and/or leaders in your Unit to participate in identifying the challenges to your Unit. Do you have a problem getting members to attend meetings? Do you have trouble getting members to volunteer for leadership positions? Do you have one person running the show who will not turn over any responsibility to others? These are just a few examples, but whatever your problems may be, identifying them is the first step in solving them.

Make a plan! How are you going to solve your Unit's problems? If you don't see any current problems in your Unit do you see any future bumps in the road? How will you continue to have a successful Unit? Make a plan and set goals! Goals both motivate members and are a way to measure success, don't forget to involve others so they can feel the pride of success!

Next DELEGATE! Delegating helps others feel needed and feel ownership in your Unit and its success! Ask members to help with projects! People like to feel needed and appreciated, we can't stress that enough!

Follow through! Plans are great but you have to follow through for them to be successful. Are you sticking to your plan in a clear consistent manner? Even if the process is slow, stick to it!

Follow up! Call your committee to a meeting periodically and report on how things are going. Do modifications in your plan need to be made? Are there new problems cropping up? Did anyone have a great idea or hear feedback on an improvement?

Identify strengths/weaknesses! Make an effort to identify those who would be good future leaders. Encourage them to participate, involve them as much as possible. Not every leader needs to be a charismatic, inspiring, or an expert public speaker. Mixing skill sets makes a great team.

MRTA Tip - keep this handbook, make notes in it and pass it down to your successor.

MRTA Calendar of Events

January

- Local Unit Officer Reports
- Community Service Reports
- Unit of Excellence Report Due
- MRTF Raffle

February

- Unit Membership Calling Campaign
- Send RSVP/Coordinate Travel to MRTA Legislative Day
- Encourage participation in Legislative Blitz
- Local Unit Income Tax Report
- President Summit Registrations

March

- Attend Unit President Summit and share information

April

- MRTA - Foundation Classroom Grants send to Superintendents
- Select Fall meeting dates
- Select Distinguished Retiree
- Request information on new retiree list from Superintendents

June

- Distinguished Retiree Application Due

Summer

- Units send personal invitations to new retirees to attend 1st Fall meeting
- MRTA annual Fall Meeting Registration
- Delegate Registrations Due

September - October

- MRTA Annual Meeting
- Membership Renewal
- MRTA Foundation End of Year Campaign

MRTA Committees

MRTA has five standing committees. The goals and duties of these committees will be made by each committee yearly. All decisions made by these committees shall be presented to the MRTA Board of Directors to be ratified. These committees are:

- **Membership**
- **Legislative**
- **Informative & Protective Services**
- **Community Service**
- **Retirement Education**

The activities of these five committees reflect the very core of the MRTA Mission and Vision statements and provide members a variety of choices for participation. Unit Committees are the means by which members serve the community and the unit, develop friendships, and provide visibility for the unit.

State committees establish statewide goals and regional chairs help coordinate unit activities to fulfill those goals. Please see the following pages for information on each committee's goals and duties.

It is advisable to involve as many members as possible in committee work. Even in small units, the one-person committee should be avoided. At least one additional committee member should be able to take on an assignment if the chairman is absent, or otherwise unable to serve.

Responsibilities of Unit Committee Chairpersons

- Communicate with MRTA and the Regional Committee Chair to coordinate state and unit programs and goals
- Delegate specific tasks to unit members
- Work with other committee chairs to see that overlapping topic areas are well coordinated
- Present committee reports at meetings and/or disseminate information to unit members
- Attend MRTA workshops/meetings as designated

MRTA Committees

Membership - pg. 18

Legislative - pg. 25

Retirement Education- pg. 30

Community Service- pg. 37

Informative and Protective Services - pg. 39

Membership Committee

Local Unit Membership Chair's biggest responsibility is recruiting new members, retaining current members, and renewing those whose membership has lapsed. There are more detailed Goals and Duties that are updated each year by the committees. You can read these Goals and Duties of the MRTA Membership Committee on the next page.

How Do Retirees Find Out About MRTA?

A question we commonly get is how can we tell other retirees about MRTA, or why don't more retirees know about this great organization?

The biggest obstacle for MRTA is getting our information to new retirees. We don't have access to a list of all the retirees in Missouri, such a list does exist at Public School Retirement Systems and Public Education Employees Retirement System of Missouri (PSRS/PEERS) however, it is protected by Missouri state law. They cannot give us the list.

So how do we overcome this obstacle?

We rely on MRTA Units to go out and get the **New Retiree List** from the school districts in their area at the end of each school year and send the information to the MRTA Office before July 1. We then mail information to each retiree and ask them to join. We also encourage the Local Units to use this list to invite the new retirees to Local Unit meetings or to join the Local Unit. When the units provide us with their names and addresses, we can mail to them again each year asking them to join.

Another great way to get our name out there is for members to visit with their friends and colleagues about our organization. Don't assume others know about MRTA. There are many retirees who have never heard of MRTA simply because we don't have their contact information.

How Many Members Does MRTA Need?

MRTA preaches all the time, **there is strength in numbers!** There are almost **90,000** retirees in Missouri, over **30,000** of them are MRTA members. We are a strong organization but imagine how much influence MRTA would have if every retired teacher and public school employee was an MRTA member. It's a widely known fact that retirees vote. If there were an organization of 90,000 retirees in Missouri it would be sure to catch the Legislature's full attention!

We will talk more about MRTA's membership goals later on the next page.

GUIDE TO YOUR MRTA MEMBER BENEFITS



MISSOURI RETIRED TEACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL



Dental & Vision Plans

Freedom to use any dentist and no network required. Routine cleanings and exams are part of the plan and there are no referrals required for specialty care. Vision Service Plan (VSP) is the largest national eye care company. VSP offers one-stop shopping and discounts for all your eye care needs.



Home Health Care Insurance

This policy is designed as an affordable solution that helps give you the flexibility and freedom to utilize the type of care that's right for you – in your very own home.



Long Term Care Insurance

AMBA will build a policy to match your needs. You select the daily benefit amount, elimination period, and benefit period which best suits your needs for care. The policy features include no prior hospital stay and no waiting period for pre-existing conditions.



Medicare Supplement Plans

This plan offers the freedom of choice to select the doctors, hospitals, and clinics that members want, and they will never be cancelled because of age or health.



Cancer, Heart & Stroke Insurance

Benefits paid directly to you. Members select the benefit level that best suits their needs.



Final Expense Whole Life & Guaranteed Acceptance Life Insurance

Members can choose plans that protect their families now and at the end of life. Easy issue and Traditional plans available.



Medical Air Services Association (MASA)

MASA is dedicated to providing life-saving emergency assistance from home or while traveling. The coverage is designed to protect members against catastrophic financial loss when emergencies arise.



Annuity

Tax-deferred accumulation of interest, guaranteed, competitive interest rates, multiple payout options, and nursing home waiver.



American Hearing Benefits (AHB)

AHB offers members a complete hearing evaluation, warranty on digital technology aids in any style, loss and damage protection, and batteries with a complete benefit package.



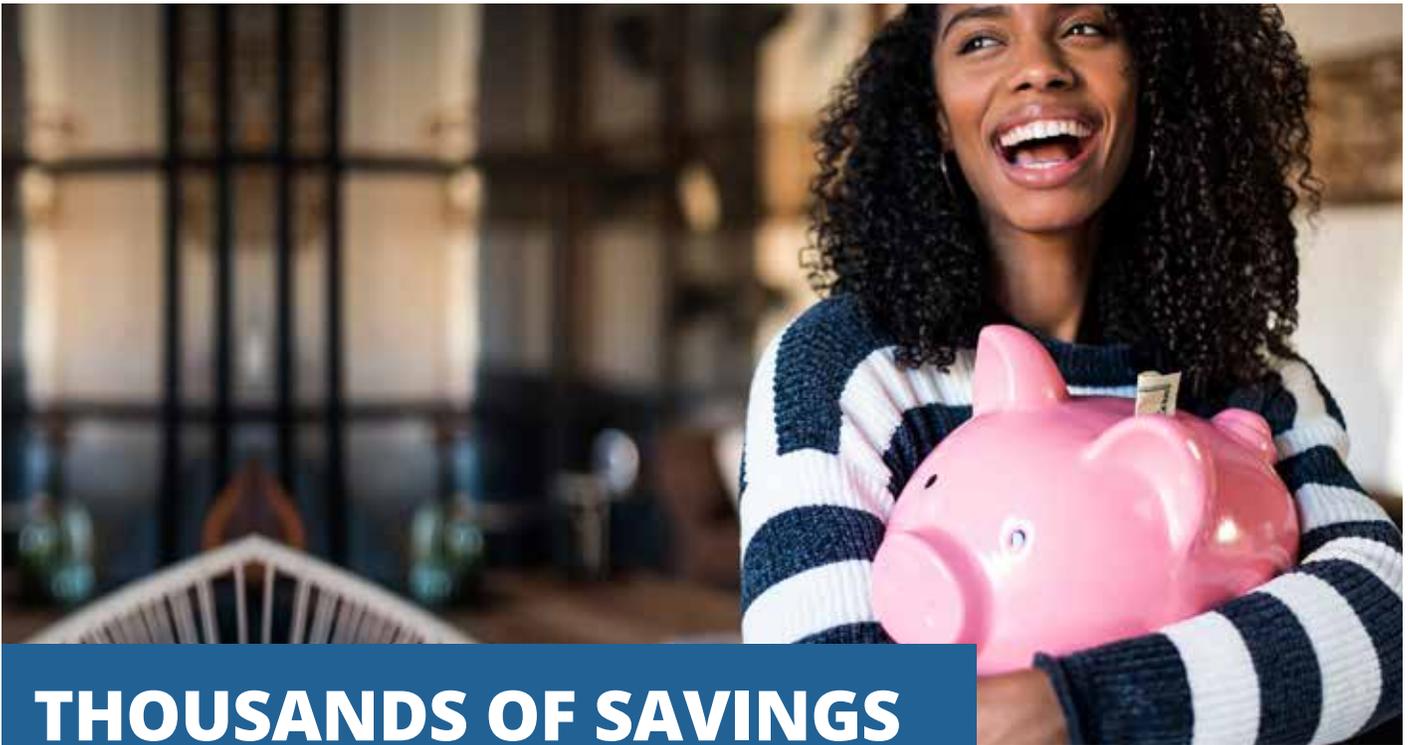
Professional Liability Coverage**

Returning to the classroom? Whether substitute teaching or contracting with the school district, get coverage. Call Forrest T. Jones & Company for more information: 800.821.7303, ext. 1134

GET YOUR BENEFITS NOW!

The Missouri Retired Teachers Association and Public School Personnel (MRTA) board has endorsed Association Member Benefits Advisors (AMBA) so that you have access to exceptional member benefits. Are you wondering if certain benefits are right for you? Contact us for a free benefits review!

877.556.4582 | www.myAMBAbenefits.info/mrta



THOUSANDS OF SAVINGS OPPORTUNITIES!

YOUR INSIGHT INTO SAVINGS



myAMBAdiscounts gives membership even more value. Explore thousands of savings opportunities on dining, event tickets, clothes, health, travel & many other discounts nationwide!

RENTAL CAR DISCOUNTS:

Avis: 800.331.1212 | www.avis.com
Budget: 800.527.0700 | www.budget.com

CRUISE & VACATION BENEFITS:

You will receive a 4% vacation reward on the base fare of your trip & will also have access to special bonus offers on a monthly basis.
855.577.9497 | www.cruiseandvacationbenefits.com

ORLANDO EMPLOYEE DISCOUNTS:

Save up to 35% on Your Orlando Vacation!
866.391.6840 | www.orlandoemployeediscounts.com

NATIONWIDE PET INSURANCE:

Get a 5% discount on new pet insurance policies:
www.petinsurance.com

1-800-FLOWERS

Members save 15% at 1-800-FLOWERS when they call or shop online!

MYAMBADINING.COM

Powered by restaurant.com, myAMBA dining.com offers members discounts at over 18,000 restaurants nationwide. When members use this discount they get the best deal for every meal! www.myAMBA dining.com

ROAD SCHOLAR:

Association Members receive exclusive discounts on educational travel. For details on upcoming trips visit www.road scholar.org

COMPUTER DISCOUNTS

Apple: 1-800-MY-APPLE | Dell: 866.257.4711 | www.Dell.com/mpp (Not all products are eligible)

TRIP BEAT

Vacation Rental Worldwide to save up to 40% on weekly vacation stays at only \$399 a week. Call 844.367.6433 and mention Passport to learn more.

To learn more about benefits and discounts available to association members, and to schedule your FREE benefits review, contact AMBA at 877-556-4582 or visit myAMBAbenefits.info.





MRTA MEMBERSHIP COMMITTEE GOALS AND DUTIES – 2024

- MRTA Vision:** Secure Missouri education retirement systems based upon strong advocacy for public schools.
- MRTA Core Purpose:** The core purpose (mission) of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to promote and protect public education resulting in a financially secure retirement (pension). The four elements of public education: Students, Public School Personnel, Public Schools & Communities
- Committee Goals:** To enthusiastically recruit, retain, and regain public school personnel retirees as active and proud members of MRTA. Our success and influence are obtained through **“STRENGTH IN NUMBERS.”**
- Objectives:**
1. Encourage each MRTA Unit to have a Membership Chairperson and a committee who are responsible for state MRTA membership as well as local membership. Encourage each MRTA Unit President to have at least 80% of their unit members also be members of MRTA.
 2. Acquire the school directory lists of the names and addresses of the new retirees, both teachers and school personnel, each year from every school district in your MRTA Unit/Region. Districts having no retirees should also be reported.
 3. Increase the current MRTA membership renewal rate of 73.01% to 77% by the end of 2024 and to 80% by the end of 2025.
 - a. Promote the advantage of automatic dues renewal via the MRTA website for payment of MRTA dues.
 - b. Grow and organize MRTA and local unit social media outreach as well as membership campaigns and membership recruitment via Zoom, Facebook, emails, phone calls, and other forms of contact.
 - c. Offer the convenience of paying a three-year MRTA membership.
 4. Increase MRTA membership by promoting MRTA member benefit provider **Association Member Benefits Advisors (AMBA)**. Nationwide estimates say that 30% of education retirees will join due to these benefits and discounts. MRTA members can save up to \$10,000 annually with these benefits.
 5. Coordinate membership campaigns with the state office. These campaigns should include beneficiaries of all public education retirees and Public Education Employees Retirement System (PEERS) retirees as MRTA members such as the distribution of the **MRTA PEERS Membership Brochure**.
 6. Work with the MRTA Retirement Education Committee to:

MRTA, a 501(c)(4) not-for-profit corporation, is a grassroots advocacy association with nearly 30,000 members. MRTA is independent, nonpartisan, and does not endorse political candidates.

MRTA Membership Calendar

The MRTA Membership year runs January 1- December 31 each year but membership activities start in October of the year prior. This gives members many chances to get their membership in before it expires and allows office staff to focus on Legislative Session which starts in January each year.

Important Dates to the MRTA Membership Committee include:

October 1 - Membership Renewal month. Encourage members to renew for the next year. The first renewal notice is mailed to all members who owe for the following year. Emphasize that the Automatic Draft Plan saves members time and saves the MRTA office postage!!

December 1 - Second renewal notices are sent to members whose dues have expired.

February - March- MRTA Unit Calling Campaign - The MRTA mails lists of Non-Renewal Members to each unit President and unit Membership Chair. MRTA also sends with the lists suggested talking points of information which are relevant for that year or legislative issues that are important in the current legislative session. Enlist the help of ALL members to make phone calls reminding members of the importance of MRTA and that their dues have expired. Suggest non-renewals use the Automatic Draft Plan!

April - Start collecting the names, addresses, phone numbers, and email addresses of all new retirees from schools in your area. Please include all staff - teachers, aides, secretaries, bus drivers, etc. These should be turned in as soon as possible. This is a great time to speak at a school board meeting and suggest the school board pay for MRTA memberships as a retirement gift for each of their retiring teachers and staff!

August 1- Obtain a new member month. Have each member ask a new retiree from the lists collected in April to join MRTA and attend a Local Unit Meeting. This is also a great time to attend Back to School meetings for local districts. Set up an information table, visit with staff, and ask to speak to NEW TEACHERS about defined benefits vs. defined contribution pensions.

MRTA Calling Campaign

In late February or early March each year, MRTA mails the list on Non-Renewed Members to Units. These lists are mailed to the Unit President and Unit Membership Chair that is listed on the most recent Unit Officer Report that your Unit has submitted to the state office. We ask your Unit to put together a Calling Committee and start making phone calls to remind members that their dues are now expired and encouraging them to consider joining again. Along with the list we will also send suggested talking points or information on issues that are relevant for that year or legislative issues that will be important in the current Legislative Session.

Membership Lists

Do you know how many of your Unit members are also MRTA members? Do you want to know who is a state member but not a Unit member? At your request, MRTA will send you a list of our members from your area which you can then compare to your Unit's membership list.

****Reminder - All lists are confidential and we ask that you please destroy them after use.***

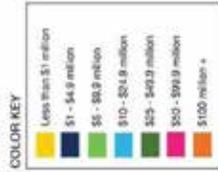
MRTA is the best investment to protect your largest asset! Join today!

Retired Teachers and Education Employees Make a Huge Impact on the Economy Across the State!

As of December 31, 2023, approximately 110,000 individuals received benefits from PSRS/PEERS. Total annual benefits paid was over \$3.7 billion. Of this amount, over \$3.3 billion, or 88%, was distributed among Missouri's 114 counties, positively impacting the state's economy.



To see how your county's economy benefits scan the QR code.



Life-Long Pension Income

PSRS/PEERS Retired Members Over 80

The oldest PSRS retiree is 112! The oldest PEERS retiree is 104!



MISSOURI PSRS/PEERS

Cost-of-Living Adjustments

Missouri law provides the PSRS/PEERS Board of Trustees some discretion when setting annual benefit increases.

Board Approved Funding Policy	
CPI-U	COLA per Board Approved Funding Policy
Less than 0%	0%
0-2%	US when CPI-U is cumulatively below 2%
0-2%	2% when total cumulative CPI-U reaches 2% or more
2-5%	2%
5% or more	5%

PSRS & PEERS special report February 2023, September 2023

The ABC's of MRTA

Advocacy

- PSRS/PEERS Pensions for over 107,000 Retirees
- Public Education
- Retirement Security
- Repeal of WEP/GPO



Benefits

- Monthly E-Newsletters
- Phone 2Action
- Legislative Alerts
- External Lobbyist
- In partnership with AMBA we provide our members with up to \$10,000 in discounts and value
 - Sam's, Costco, Hertz, Dell, Apple and thousands of other discounts

Community

- MRTA members have volunteered over 800,000 hours to our communities
- Given over \$611,000 in MRTA – Foundation Grants to active educators
- Fellowship opportunities with other former teachers
- Social gatherings and community connection



3.4.23

Missouri Rankings



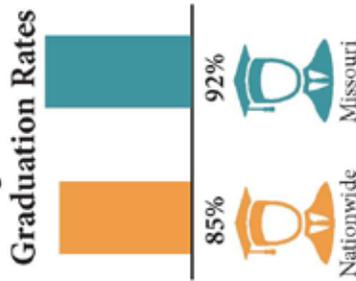
Currently, beginning Missouri teachers' salaries rank 50th out of the 50 states with Missouri total revenue spent on education was 50th at 32% while the national average was 47.1%. Although the financial support for public education is lagging the national average, Missouri's student performance is above the national average.

Why are Missouri students outperforming the national average?

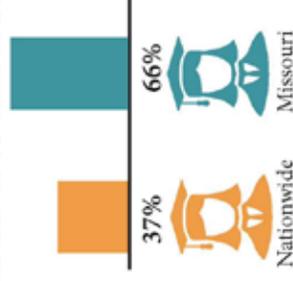
Our dedicated teachers, administrators, and education professionals are the difference and the heart of our communities!

Missouri Student Performance

High School Graduation Rates



Students to take ACT



ACT Composite Scores

Nationwide: 19.5
Missouri: 20.1

What is Right with Missouri Public Education?

It is available to every Missouri child regardless of location or financial status.

Offers various extra curricular opportunities from athletics to theater.

Class sizes tend to be smaller in early years to allow for more quality education for each child.

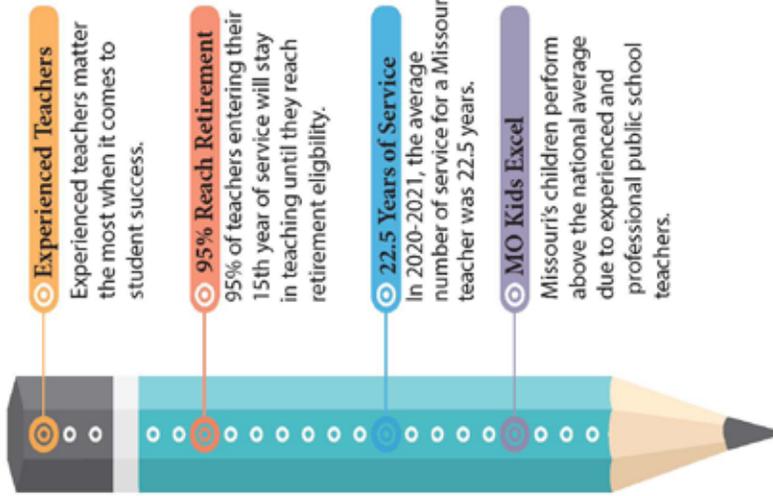
Allows for specialized classes, advanced courses, trade schools, and technical courses.

Public schools offer resources that are diverse.

Public schools are accountable to the state for academic performance. Teachers are required to be certified by the state and also require ongoing education.

The average Missouri teacher has over 22 years of experience.

Missouri's Dedicated Educators Make the Difference



Legislative Committee

The MRTA Legislative Committee is charged with the task of informing members of current issues that can affect Missouri's retired teachers and public education as a whole. Missouri's Legislative Session runs from early January to mid-May each year. During this time the MRTA office will send out Legislative Reports or Legislative Alerts that we ask your Unit Legislative Chair to report on at your meetings.

- A **Legislative Alert** is simply a report on activities that we think MRTA members need to know about and is simply informational.
- A **Call to Action**, as its name suggests, is a little more important and often we ask for action to be taken. Usually this action is to contact your legislator or to sign a petition.

We ask all members to pay close attention to their emails from MRTA during Legislative Session.

MRTA Legislative E-mails



F.A.Q.'s

Who is my legislator? How do I contact them?

We find it is common that members do not know who their State Representative or State Senator is. You can easily find this information in a couple of different ways:

- Take advantage of MRTA's new Phone2Action program, see the next page.
- Go to www.senate.mo.gov/LegisLookup/ and put in your address.
- Call your County Clerk's office. They can help with finding your legislator and may be able to give you their contact information as well.

Contacting your legislator can be done by phone, email, fax, letter or in person. We usually recommend an email but that isn't always the answer, only you can decide what is best for you.

Why doesn't MRTA get involved in active teacher issues?

MRTA's #1 priority is retired public education retirees. We do occasionally get involved in active teacher issues or issues that are good for public education as a whole, but usually only when we are asked by an active teacher association like MNEA and MSTA.

Phone2Action

If the pandemic taught us anything, it is that we must find NEW ways to connect. Please encourage members to sign up for our newest way to communicate with legislators, MRTA Phone2Action!

- Text Messaging - you can now receive MRTA "Call to Actions" via text message. You simply will tap the link in the text message to take action.
- Email - MRTA will continue to send you "Call to Action" emails. Phone2Action allows you to also take advantage of the service on your computer.



What is different? With Phone2Action you do not have to look up your legislators, you simply put your name and address in the form and the service does all the work for you. Plus, no more copying and pasting messages into your email service. You simply either use MRTA's pre-written message or write your own and tap one button! Your message will go to your legislators.

If you would like to receive the text messages from MRTA, text MRTA to 52886 or visit the Phone2Action tab on MRTA's website to sign up.

MRTA Legislative Calendar

January - Legislative Session starts on the first Wednesday after the first Monday in January and runs through mid-May.

February - MRTA Legislative Day is held - usually the second Tuesday of the month.
For 2024 the date is February 11th.

May - Legislative Session ends near the middle of the month.

MRTA Legislative Day

MRTA Legislative Day is held in February each year at the Missouri State Capitol. All MRTA members are invited to attend! We will provide information to you on the issues and serve you lunch. All we ask in return is that you visit your legislators.

We usually start sending out information about Legislative Day in August before the date. Watch our August newsletter and your email for information.



MRTA Capitol Blitz Day

MRTA Capitol Blitz Day is always held the same day as MRTA Legislative Day and is meant for those who cannot attend Legislative Day in person. We ask all participants to write or phone their legislators instead of visiting with them in person. We ask you to do this all on the same day as it leaves a memorable impact. It shows our strength in numbers, this is why we are successful. This is probably the most important day of the year at MRTA and we ask all members to participate in either Legislative Day or Capitol Blitz Day.

MRTA Legislative Platform

The MRTA Legislative Committee meets each year around July and sets the MRTA Legislative Platform for the following year. The Platform is a basic set of issues that MRTA is concerned about for the next year. The issues themselves are separated into three categories:

- **Special Legislative Issues of Interest** - These items are a broad description of issues that are both on a state and federal level, and generally speaking are very important issues to retirees but are not issues that we feel are immediately being threatened or pushed.
- **State Issues of Interest** - These issues would be considered by the Missouri state legislature and are oftentimes issues that have been recently attempted or will likely be taken up again in the next year.
- **Federal Issues of Interest** - These are issues that would be considered by the United States Government.

You can find the current MRTA Legislative Platform on the next page.



2024 MRTA Legislative Platform

“MRTA is independent, non-partisan, and does not endorse political candidates.”

RETIREMENT SYSTEM LEGISLATION AND POLICY

1. MRTA strongly supports the PSRS/PEERS of Missouri Cost-of-Living Adjustment (COLA) statute. Cost-of-living adjustments are vital to the financial stability and security of our retirees.
2. MRTA will advocate for the restoration of the COLA the PSRS/PEERS Board of Trustees has reduced twice in the past twelve years. MRTA supports the restoration of the 2011 COLA Policy levels for PSRS/PEERS of Missouri retirees.
3. MRTA will advocate for PEERS retirees COLA eligibility to be consistent with the PSRS statute.
4. MRTA supports a COLA increase for the retirees of the PSRS of the City of St. Louis (last increase was in 2006) and the PSRS of Kansas City, MO (last increase was in 2008).
5. MRTA supports an increase to the limit for PSRS/PEERS of Missouri retirees capped at 80% COLA.
6. MRTA is opposed to any pension reductions for our active or retired teachers and education personnel (reducing the COLA, tiered plans, etc.).
7. MRTA will advocate for the preservation and protection of the strong financial integrity and transparency of PSRS/PEERS.

STATE LEGISLATIVE ISSUES OF INTEREST TO MRTA

1. MRTA will work to protect the Missouri public pension retirement plans as defined benefit plans rather than defined contribution plans.
2. MRTA will support the current independent governance and decisions of the Boards of Trustees of the following public education retirement systems: PSRS/PEERS Retirement System of Missouri, PSRS of Kansas City, Missouri, and PSRS of the City of St. Louis.
3. MRTA supports the current statute mandated by Missouri law requiring the same health insurance premium cost and coverage for retirees as active public school employees.
4. MRTA will advocate for an increase in funding of the Foundation Formula through a revision of the

MRTA, a 501(c)(4) not-for-profit corporation, is a grassroots advocacy association with over 30,000 members. MRTA is independent, nonpartisan, and does not endorse political candidates.

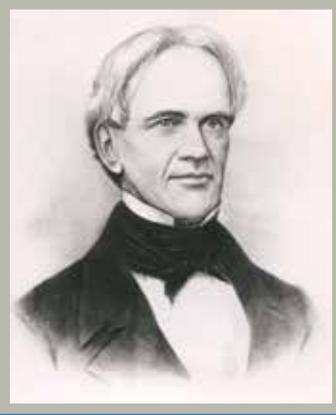
2012 Standard Adequacy Target, which was capped at 2005 levels, to align with the current appropriation and inflation levels. *MRTA supports an increase in the percentage spent on public education to 35%. Missouri is currently ranked 50th in revenue spent on public schools at 30.7% while the national average is 40.1%.*

5. MRTA will oppose any legislation that would reduce state tax revenue for public school funding.
6. MRTA will oppose vouchers, education tax credits, education scholarships, or any other use of tax dollars for nonpublic schools.
7. MRTA will oppose the statewide expansion of charter schools, support requiring the use of certificated teachers in virtual and charter schools to be members or retirees of PSRS, and support accountability for virtual and charter schools equal to that of public schools.
8. MRTA supports the recruitment and retention of public school teachers and educational staff. Teachers and educational staff matter most when it comes to student success.
9. MRTA will advocate for legislation to fully fund an increase in beginning teacher pay and average teacher salaries. *Missouri is currently ranked 50th in beginning teacher pay and 45th in average teacher salaries.*
10. MRTA will support the current statute which provides the Missouri state income tax exemption for public education retirees that MRTA was instrumental in passing in 2007 (HB 444).

FEDERAL LEGISLATIVE ISSUES OF INTEREST TO MRTA

1. MRTA will support legislation to repeal/modify the WEP (Windfall Elimination Provision) and GPO (Governmental Pension Offset) provisions of Social Security.
2. MRTA will oppose mandatory Social Security for new educator members of PSRS of Missouri.
3. MRTA will oppose privatization of Social Security. PEERS of Missouri, PSRS of St. Louis, and PSRS of Kansas City, Missouri benefit greatly from Social Security. MRTA does not support a reduction in current benefit levels.
4. MRTA supports accessible, cost-effective healthcare and prescription medications to promote financial security for all.
5. MRTA supports efforts that would encourage the recruitment and retention of teachers by decreasing student loan debt.

[MRTA, a 501\(c\)\(4\) not-for-profit corporation, is a grassroots advocacy association with over 30,000 members. MRTA is independent, nonpartisan, and does not endorse political candidates.](#)



“The public school is the
GREATEST DISCOVERY
made by man.”

Horace Mann
(1796-1859)

“...such education can be provided only by well-
trained, professional teachers.”

Keeping Missouri Communities Strong With Experienced School Teachers

Missouri Retired Teachers Association and Public School Personnel

**MRTA promotes and protects pensions, programs, and benefits of all public school personnel in retirement.
MRTA is 30,000 members strong and growing. Join us today!**

- A first-rate pension keeps experienced and professional teachers in the classrooms for our children.
- Missouri's children test above the national average due to experienced and professional public school teachers.
- Teacher pensions infuse over \$3 billion into the Missouri economy each year. This keeps Missouri's communities strong.



**MRTA asks public school teachers, support staff, and education retirees to join today!
www.mrta.org**

Keeping Missouri Communities Strong With Well-Trained Professional Teachers

In the Beginning

The challenge of attracting and retaining quality teachers goes back to the formation of public schools in what was referred to as the Territory of Missouri. The Act of 1808, by the “Territorial Legislature of Louisiana,” provided for a Board of twenty-one Trustees, who were authorized to receive donations for the endowment of the public schools. This Act led to securing some “cultured women” to have charge of the children and teach them the ordinary branches of the elementary school. These early teachers were to receive a small salary, often not more than ten or fifteen dollars a month (A History of Education in Missouri, Claude A. Phillips).

Through the early years of the evolution of Missouri’s public schools, much of the concern was on securing funds to support the public schools. Yet the issue of who would teach the children was paramount when reading historical accounts of the public schools in Missouri. In 1839, the Missouri General Assembly established the office of the State Superintendent of Common Schools. This initiative also provided for the distribution of State School moneys among several counties.

In 1875, the third Constitution of Missouri led to numerous changes in the public schools to include the establishment of three Normal Schools in Kirksville, Warrensburg and Cape Girardeau. Their purpose was the professional training of teachers for the approximately ten thousand school districts in Missouri at that time. Later in 1903, again for the purpose of teacher preparation, the Springfield and Maryville Normal Schools were established.

Also, in 1903 the State Superintendent was given the power to inspect and classify the High Schools. Then, in 1909, the General Assembly passed a law providing for the State-wide County Supervision of rural schools. This first classification program for Missouri schools, among several requirements, stated, “The teacher must hold a second grade or higher certificate” (county teaching certificate).

Through two World Wars, a Great Depression and other challenges of the first half of the 20th Century, Missouri Public Schools continued to evolve with a focus still on improving the quality of the teaching profession—well-trained teachers-- that leads to enhanced opportunity for Missouri school-age youth.



The Focus Expands

In the early 1940’s the focus on strong teachers expanded from training in the “Normal Schools” to include recruiting and retaining those well-trained teachers in all Missouri communities.

In 1941 Everett Keith was named the Missouri State Teachers Association (MSTA) Executive Director. Mr. Keith made establishing a teacher retirement system his top priority. In May 1945 Governor Forrest C. Donnell signed into law, beginning in July 1946, a bill establishing the Public School Retirement System (PSRS), with the purpose to help school districts strengthen the recruitment and retention of quality teaching staff to educate the children of Missouri. The principle guiding recruitment and retention was, and continues to be, to provide financial security in retirement for Missouri teachers. How important this guiding principle would become to help financially invigorate local Missouri communities.

Attract and Retain Quality Professional Teachers

For the last seventy-three years (1946-2019) PSRS has provided a retirement system that does, in fact, help school districts provide for the recruitment and retention of a quality teaching staff to educate the approximately 900,000 children attending Missouri's Public Schools, as evidenced by:

1. 73% of classroom teaching in Missouri is performed by teachers with 20+ years of service.
2. 95% of Missouri teachers with 15 years of service will teach until they are eligible to retire.
3. In 2018-2019 the average number of years of service for a Missouri teacher was 22.5 years.
4. A January 2019 independent study by Rhee and Joyner, "Teacher Pensions vs. 401(k)" in six states found the majority of teachers in all six states (71%-84%) were better off financially with their pension plans than they would be with a 401(k). In Missouri, 84% of the teachers were better off financially with PSRS pensions than they would be with a 401(k).



Evidence of Experienced Teachers

In 2019, beginning teacher salaries in Missouri rank 49th nationally with average teacher pay at 39th nationally. Yet on important student performance measures Missouri students perform at or above national averages, as evidenced by:

1. The National high school graduation rate for 2016 was 84% and 85% for 2017. Missouri high school graduation rates for those years was significantly better at 89% and 88%, respectively (National Center for Education Statistics).
2. Nationwide 52% of students take the ACT compared to 76% of Missouri students, with nearly identical composite scores of 20.8 and 20.6 (DESE).
3. The national six-year rate for students attending colleges and universities is 57.6% while for Missouri the rate is 58.6% (DESE).

Strong Communities

A January 2019 report, "Public Pension Greatly Benefit Rural Areas" cited two other studies, a report by Pacey Economics in Colorado and a 2017 report by the Louisiana Budget Project. Both reports found their state's public pension plans had substantial positive economic impact in their states. Similarly, in Missouri for the last 73 years (1946-2019) PSRS/PEERS retiree's benefits have contributed significantly to Missouri's economy, as recently evidenced by:

1. In 2018, approximately 83,000* PSRS/PEERS retirees in Missouri received pension benefits totaling more than \$2.6 billion, significantly helping fuel Missouri's economy [* the number of retirees can change monthly].
2. Those 83,000 retirees live in communities in 114 Missouri counties. Their pension incomes buy goods and services in all 114 counties. Their retirement dollars multiply as business owners in their communities spend those dollars to pay employees and invest in their community enterprises.
3. More significant than one year of PSRS/PEERS pension benefits to Missouri retirees is the past five-years, totaling over \$12 billion. These contributions from the teachers and their school districts positively impact the economy of the state, the 114 Missouri counties and the communities in which the 83,000 retirees live.
4. A report by the National Institute on Retirement Security (NIRS), "Pensionomics 2018: Measuring the Economic Impact of DB Pension Expenditures" found that each \$1.00 in pensions in Missouri ultimately is multiplied to \$1.43 in total output in Missouri.
5. Further, that same report shows each \$1.00 of retiree contribution returns as much as \$6.00 in total output in Missouri.

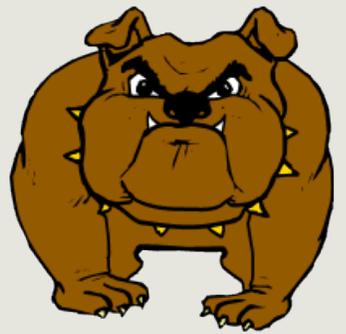
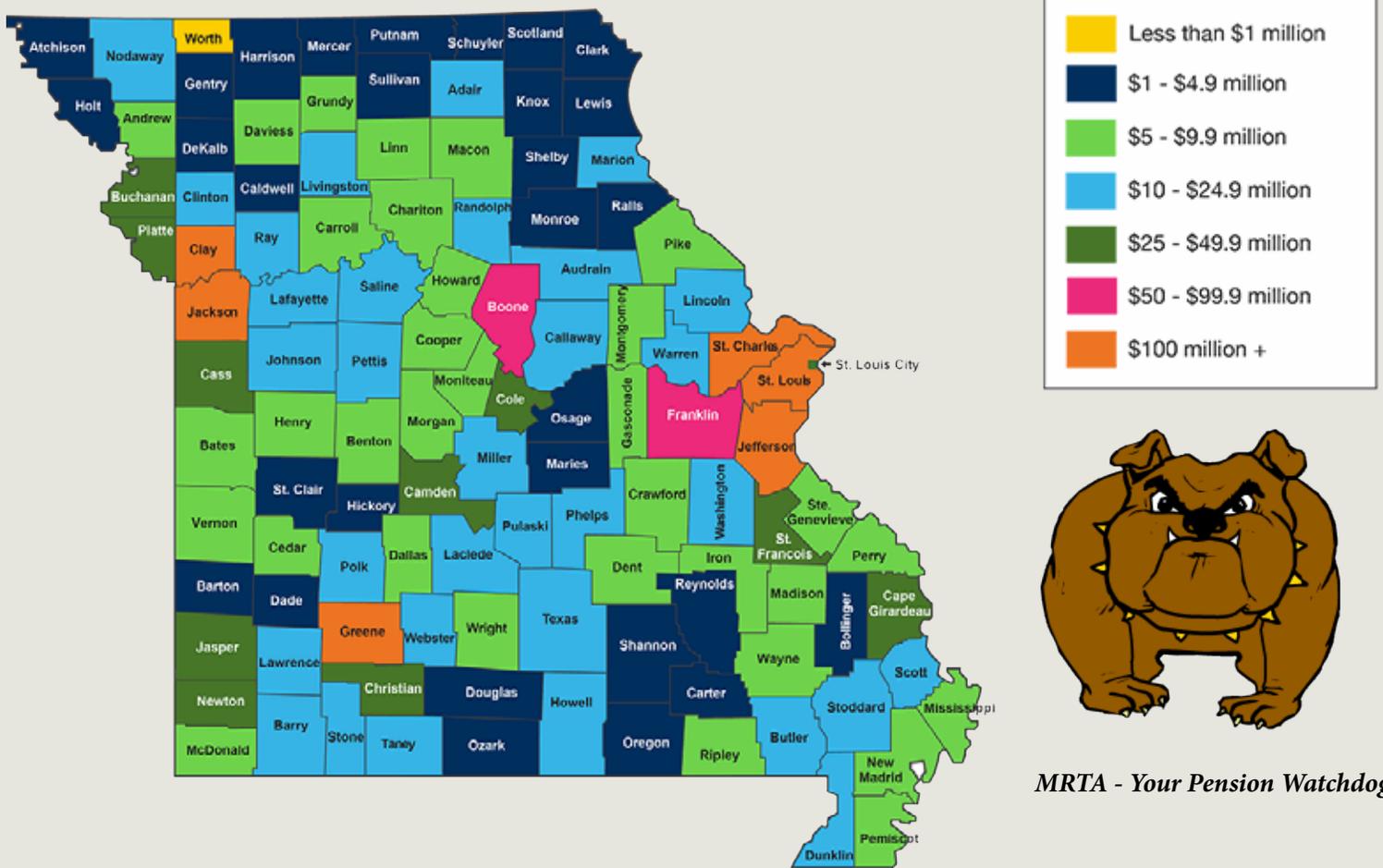
The past 73 years have laid a strong foundation for the future of education retirees in Missouri. MRTA recognizes how the Public School Retirement System (PSRS) has contributed to creating strong communities in Missouri by providing a strong retirement program for Missouri teachers. Let's keep it that way.

Because of PSRS

1. Retirees are financially far better off than they would be under a 401(k) plan.
2. Schools are better off because they have veteran teachers.
3. Student performance is better because of veteran teachers.
4. Communities are better off because retirees spend their pension benefits in the community, and those expenditures are multiplied.
5. Every county in Missouri is financially better off.
6. The State's economy is enriched by \$3 billion annually.

Any changes to PSRS's retirement benefit calculations resulting in a reduction of benefits will negatively impact Missouri's economy, and negatively impact every county in Missouri. Let's not do that to our children's future.

Economic Impact of Education Retirees make Strong Communities



MRTA - Your Pension Watchdog

As of December 31, 2019, over 97,000 individuals received benefits from PSRS/PEERS. Total annual benefits paid were more than \$3 billion. Of this amount, more than \$2.7 billion, or 89%, was distributed among Missouri's 114 counties, positively impacting the state's economy.

To become a member of MRTA go to www.mrta.org
 Missouri Retired Teachers Association and Public School Personnel
 3030 DuPont Circle, Jefferson City, MO - 1-877-366-6782

Retirement Education Committee

The MRTA Retirement Education Committee is charged with educating and informing both members and prospective members of the value of their pension benefits in retirement and how MRTA is essential to enhancing and protecting those educator pension benefits.

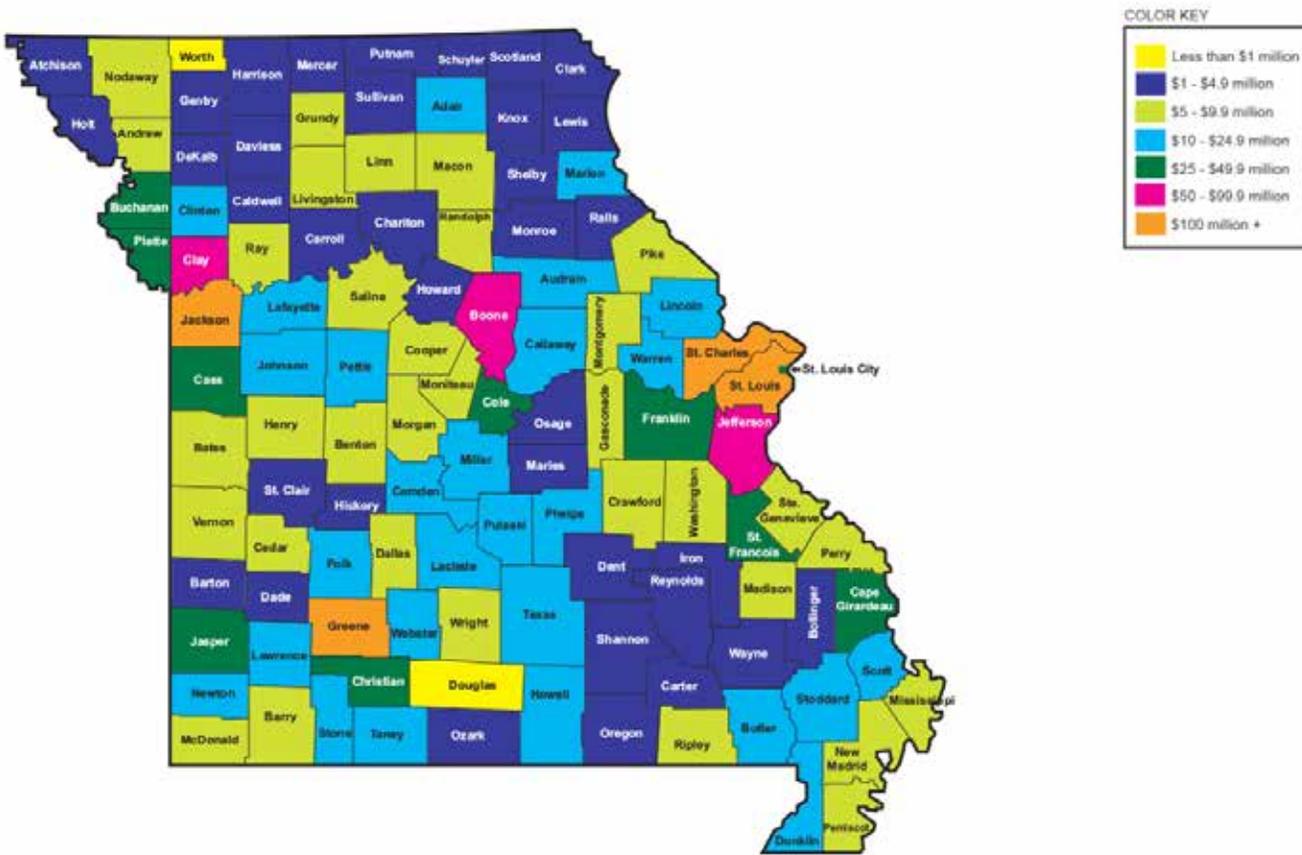
Currently one of the biggest projects of the Retirement Education Committee is attending conferences for different education related associations and informing attendees about MRTA. We keep an updated list of these on our website, www.mrta.org and encourage Local Units to participate in events in your community where educators both retired or active may attend.

You can find informational handouts for use at your Local Unit meetings at www.mrta.org like PSRS/PEERS Benefits by County below.

PSRS/PEERS Benefits by County

(un-audited calendar-year data as of December 31, 2023)

As of December 31, 2023, approximately 110,000 individuals received benefits from PSRS/PEERS. Total annual benefits paid was over \$3.7 billion. Of this amount, over \$3.3 billion, or 88%, was distributed among Missouri's 114 counties, positively impacting the state's economy.





MRTA
MISSOURI RETIRED TEACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL
877-366-MRTA
3030 DUPONT CIRCLE
JEFFERSON CITY, MO 65109
WWW.MRTA.ORG

MRTA Retirement Education Committee Goal and Objectives – 2024

Adopted September 28, 2023

MRTA Vision:

Secure Missouri education retirement systems based upon strong advocacy for public schools.

MRTA Core Purpose:

The core purpose (mission) of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to promote and protect public education resulting in a financially secure retirement (pension). The four elements of public education: Students, Public School Personnel, Public Schools & Communities

Committee Goal:

To educate and inform present and future public school personnel and communities of the value of public schools, educator pension benefits in retirement, and how public pension benefits help recruit and retain experienced school personnel in our school districts.

Objectives:

1. Every MRTA Unit will have a Retirement Education Chairperson to increase communication between Regional Chairpersons and Local Units.
2. Regional Committee Chairs will work with local Unit Chairs to ensure that all district or building leadership be personally contacted to promote ***“Keeping Missouri Communities Strong with Experienced Teachers and Support Staff.”***
3. Collaborate with the MRTA Membership Committee by attending school gatherings such as professional development, health fairs, convocations, etc. and to periodically provide MRTA materials, including MRTF Grant Applications to every building.
4. Promote MRTA as essential to enhancing and protecting:
 - a. Public schools.
 - b. Public School pension benefits.
 - c. Strong Missouri communities.
5. Participate in at least ten statewide education/non-traditional education groups and association events or conferences to promote MRTA.
6. Organize or participate in local MRTA Retirement Education Workshops for retirees and current public school employees in each of MRTA’s 14 Regions to educate attendees about the value and importance of public education and pensions to communities.

MRTA is a 501(c)(4) not-for-profit corporation, is a separate, diverse association with nearly 20,000 members

Community Service Committee

The MRTA Community Service Committee encourages MRTA members to continue their public service by providing and encouraging opportunities to serve their local communities as retired educators.

Local Units are encouraged to participate in MRTA Statewide projects like Show Me Hunger but are also encouraged to create your own service projects and to ask members to track volunteer hours they complete on an individual basis, a form to track these hours can be found in the following pages.

MRTA Community Service Calendar

January - Unit Members should turn in their volunteer hours from the previous year to the Unit Community Service Chair

February 1 - Unit Community Service Chair should report their Unit's total volunteer hours to the Regional Community Service Chair by February 1.

February 15 - Regional Community Service Chair should report their Region's total volunteer hours to the State Community Service Chair by February 15.

MRTA Show-Me Hunger Relief Project

Who – We would like each MRTA Unit to participate.

What – Collect food and/or monetary donations for local food banks. Find out what your food bank needs most. Some collect hams and turkeys for the holidays.

When – Mid-October or early November are best but the date is up to you!

Where – Optional – outside a local grocery store, go door-to-door after promoting with door hangers or flyers, at a local festival, etc.

Don't forget to promote your event in community news bulletins, community events Facebook pages, local television, and newspapers beforehand if possible. Follow up with a photo and total amount afterward to newspapers. Please send your photos to MRTA as well!

A Few Ideas

- **Ask a local grocery store if you can collect outside on a weekend**
Try and collaborate with the store for a time when canned items or frozen turkeys are on sale.
- **Trunk or Treat/Fall Festival/Other Community Events**
Ask the community to bring a non-perishable food item to your event.
- **Spread flyers or door hangers throughout your community asking for donations**
Come back and collect on a set date and approx. time.
- **Make it a Unit Event**
Ask all Unit members to bring items to a meeting for a chance to win a prize.
- **Make it your own! You know your community best. Plan an event that works for you!**



MRTA
Missouri Retired Teachers Association
and Public School Personnel
877-366-MRTA
3030 DuPont Circle
Jefferson City, MO 65109
www.mrta.org

MRTA Community Service Committee Goal and Objectives – 2024

Adopted September 29, 2023

MRTA Vision: Secure Missouri education retirement systems based upon strong advocacy for public schools.

MRTA Core Purpose: The core purpose (mission) of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to promote and protect public education resulting in a financially secure retirement (pension). The four elements of public education: Students, Public School Personnel, Public Schools & Communities

Committee Goal: To inspire MRTA members to continue their public service by providing and encouraging opportunities to serve their local communities as retired public school personnel. **TO SERVE, NOT TO BE SERVED** is our motto.

Objectives:

1. Every MRTA Region will have a Community Service Committee Chair to communicate with and disseminate information to the Local Unit Community Service Chairpersons.
2. Local MRTA Units will have a Community Service Committee chairperson to disseminate information to active and retired public school personnel.
3. Encourage involvement in the 2024 MRTA community service projects:
 - a. Participate in Show-Me Hunger by collecting and donating food, other household necessities, and money to help with local needs.
 - b. Form partnerships with regional food banks, food pantries, or other agencies dealing with hunger.
 - c. Collect can tabs for the Ronald McDonald House.
 - d. Collect food labels for local schools.
4. Promote and report all local unit MRTA community service projects through publications via newspapers, social media, Facebook, and the MRTA website.
5. Local MRTA Units will report to the community service regional chairpersons by February 1 of each calendar year their unit's:
 - a. Volunteer hours.
 - b. Number of food/other household necessities donated for hunger relief.
 - c. Cash donations for hunger relief.
6. Increase MRTA membership through fellowship and community involvement.
7. Promote MRTA to active and retired public school personnel through community service activities.

MRTA, a 501(c)(4) not-for-profit corporation, is a grassroots advocacy association representing nearly 30,000 members. MRTA is independent, nonpartisan, and does not endorse political candidates.



MRTA Community Service Reporting Form

Total Community Service Volunteer Hours, Food Item and Cash Donations Tally

Month	Hours Volunteered	# of Food/ Other Items	Cash Donated
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			
Total			

Year

Name

Unit Name

Total Hours

Total # of Food/Other
Items

Total Cash Donated

Members - turn in to your Unit Community Service Chair by January 1.

Unit Community Service Chairs - turn in to your Regional Committee Chair by February 1.

Regional Committee Chairs - turn in to the State Committee Chair by February 15.

Informative & Protective Services Committee

The MRTA Informative and Protective Services Committee works to increase MRTA membership through fellowship and by providing information important to MRTA retirees that will affect their quality of life in retirement.

The Informative & Protective Services Committee tab on the MRTA website, www.mrta.org, has lots of informational reports like the one below for use at Local Unit meetings.



✓ INVESTIGATOR TIPS

Anatomy of a Scam

There is no single group of people who is more likely than any other to be the target of a scam. Kroll's Investigators talk to people from all walks of life who have fallen victim.

To avoid a scam, it is helpful to understand how one is put together. Here we take a look at the basic components:

- **Contact information is collected.** The scammer has obtained some of your personal identifying information (PII) which might include, name, email address, phone number, address, and/or other information they will use to reach you. If contact information is not first obtained by the scammer, then they will lay out a bait of some sort-- a fake employment ad, for example, that might cause you to contact the scammer first and provide personal identifiers.
- **A compelling story is presented.** This is where the scammer gives the reason they need PII and/or money from you. The fake reason may be one of the following:
 - You won the lottery held in another state or country (even though you never entered that lottery)
 - You are offered an well-paying, work-from-home job
 - Your credit card or bank account is in danger of being closed or your access to it restricted
 - A person in a foreign country needs your help getting a great fortune transferred to the United States
- **The target of the scam gives up personal information or money.** This is where the trouble starts—you give them your personal identifiers, access to your credit card or bank account or accept a bad check presented to you by the scammer.
- **The scammer is rewarded.** Now the scammer gets to work using information provided by the scam victim to steal money, open new credit accounts, or trick the victim into giving money to the perpetrator of the fraud.

Use these tips to avoid falling victim to a scam:

- Hang up on anyone that you believe is a scammer. Do not push any buttons on your phone or speak to the caller.
- Legitimate businesses will not send email or text messages asking for your PII. Delete such messages without responding.
- Don't trust Caller ID. Scammers can mask their number.
- Think about what you are asked for before providing your PII, clicking on a link in an email, answering an ad, etc.
- Do not pay any money toward a debt that is not yours.
- Do not give anyone your passwords.
- Be cautious when using a search engine. The first links listed are paid advertisements and may not be the site you seek.

A service of the Investigators of Kroll Advisory Solutions

These materials are derived from the research and discovery activities of Kroll Advisory Solutions' Fraud Specialists and licensed investigators, and have been gathered from personal, historical, and aggregated experiences performing specialized computer services on behalf of identity theft victims. While believed to be accurate, these materials do not constitute legal advice, and are not guaranteed to be correct, complete or up-to-date. No part of this document may be reproduced, transmitted, stored in a retrieval system, or translated into a language or computer language, in any form by any means, electronic, mechanical, optical, chemical, magnetic or otherwise, without the express written consent of Kroll Advisory Solutions. These materials are provided for informational purposes only.

MSM-076-2013-11-01



MRTA
MISSOURI RETIRED TEACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL
877-366-MRTA
3030 DUPONT CIRCLE
JEFFERSON CITY, MO 65109
WWW.MRTA.ORG

MRTA Informative & Protective Services (IPS) Committee Goal and Objectives 2024

Adopted September 29, 2023

MRTA Vision: Secure Missouri education retirement systems based upon strong advocacy for public schools.

MRTA Core Purpose: The core purpose (mission) of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to promote and protect public education resulting in a financially secure retirement (pension). The four elements of public education: Students, Public School Personnel, Public Schools & Communities

Committee Goal: To provide retired public school personnel with valuable information and to promote MRTA through sources such as newspapers and social media.

Objectives:

1. Every MRTA Region will have an IPS Committee Chair to communicate with and disseminate information to the Local Unit IPS Chairpersons.
2. MRTA Units will have an IPS Committee chairperson to disseminate information to active and retired public school personnel through sources such as newspapers and social media.
3. Committee members will use MRTA website, IPS webpage, social media, newspapers, and other sources to:
 - a. Share information and reports at MRTA meetings.
 - b. Promote MRTA and its activities to increase membership.
 - c. Provide members and the public with information regarding:
 - i. Missouri public education retirement issues
 - ii. Public education issues
 - iii. Cybersecurity and fraud issues
 - iv. Other retiree and member issues
 - d. Promote MRTA activities and events.
 - e. Participate in October's National Cybersecurity Month as a statewide IPS project.

MRTA, a 501(c)(4) not-for-profit corporation, is a grassroots advocacy association representing nearly 30,000 members. MRTA is independent, nonpartisan, and does not endorse political candidates.

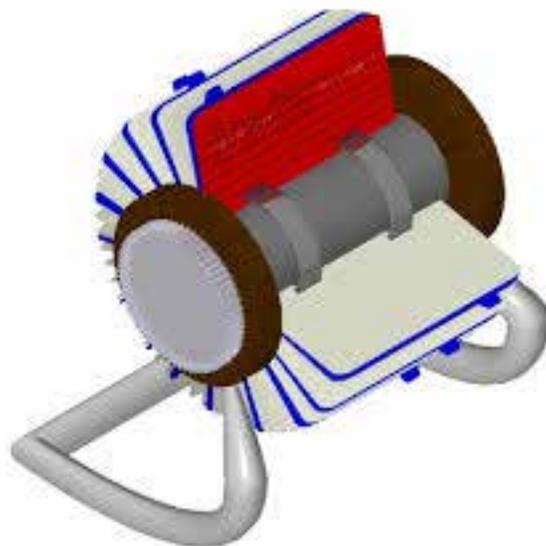
Forms

Local Unit Officer Report

Please fill out and mail in a Local Unit Officer Report when you have a change in leadership or by January 15 of each year. We cannot stress enough how important this is. Without this document we will not know who your Unit's leaders are or who to contact within your Unit. You can find a copy on the MRTA website, www.mrta.org or on the next page. Fill it out and make sure to keep a copy for yourself or for your successor.

This document is also very helpful on a Local Unit basis. Your Unit members can use it as a guide to contacting your Unit Leaders.

MRTA Tip - succession training is always a GREAT idea! Keep this handbook, make notes in it and pass it down to your successor.



Make sure MRTA knows who your leaders are! The Local Unit Officer Report is our link to your Unit leaders!



MRTA LOCAL UNIT OFFICER REPORT

This report is required December 15 of Every Year.

The Unit President or Secretary should complete and mail to:

MRTA 3030 DuPont Circle, Jefferson City, MO 65109 OR E-Mail to mrta@mrta.org

For Office Use
MRTA STATE
MEMBER ID#

DATE: _____

NAME OF LOCAL UNIT: _____

Year and Month Established: _____

DOES YOUR UNIT HAVE A FACEBOOK PAGE OR WEBSITE: _____ FACEBOOK _____ WEBSITE _____ NEITHER

Please enter the link/name: _____

OFFICERS

PRESIDENT: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

PRESIDENT-ELECT OR VICE-PRESIDENT: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

SECRETARY: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

TREASURER: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

COMMITTEE CHAIRPERSONS

MEMBERSHIP CHAIR: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

For Office Use
MRTA STATE
MEMBER ID#

LEGISLATIVE CHAIR: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

COMMUNITY SERVICE CHAIR: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

INFORMATIVE & PROTECTIVE SERVICES CHAIR: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

RETIREMENT EDUCATION CHAIR: _____

E-MAIL ADDRESS: _____

ADDRESS: _____

CITY, STATE ZIP: _____ PHONE: _____

MEETING & MEMBERSHIP INFORMATION

This information will be used for the MRTA Unit of Excellence Program.

EXACT NAME OF MEETING PLACE(S): _____

EXACT ADDRESS OF MEETING PLACE(S): _____

DATE, HOUR, ETC: _____

OF MEETINGS/YEAR: _____ AVERAGE ATTENDANCE: _____

OF UNIT MEMBERS: _____ # OF STATE MEMBERS IN YOUR UNIT: _____

DURATION OF UNIT OFFICERS TERM OF OFFICE [e.g. one year, two years?]: _____

COMMENTS: _____

I.R.S. Reporting Form

Each year, your state MRTA office must file income tax reports as required by the Internal Revenue Service (IRS) for nonprofit organizations. This requirement also applies to MRTA Local Units as well. We have sought guidance from the Association's CPA. As an MRTA Local Unit, you must do one of the following:

- (1) You may file your tax information by providing the following information to the MRTA State Office (Parent Organization) with:
 - a. Your MRTA Local Unit's income and expenses for the tax year just finished, and
 - b. Your MRTA Local Unit's beginning and ending bank balances

OR

- (2) File a separate 990 or 990N for your unit if you choose not to send this information to the MRTA Parent Organization.

As a service to our MRTA Units, we are offering our Local MRTA Units the option to file under your Parent MRTA State Office (option 1). If you choose to file your own report (option 2), the State MRTA office needs to know you have chosen this route.

We will mail a copy of the reporting form to Unit Presidents and Unit Treasurers each year but for your reference it is also on the next page. All units must complete and return to the MRTA State Office no later than February 28 each year. This deadline provides the MRTA State Office time to compile information and get it submitted to the Association's CPA in time to meet our income tax filing deadlines. Filing of this report through the MRTA state office enables your unit to use our Sales Tax Exemption certificate for your unit's expenses.



MRTA
MISSOURI RETIRED TEACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL
877-366-MRTA
3030 DUPONT CIRCLE
JEFFERSON CITY, MO 65109
WWW.MRTA.ORG

MRTA LOCAL UNIT I.R.S. Tax Filing Requirements – Tax Year _____

MRTA Unit Name: _____

Reporting Officer Name: _____
(please print)

- Our MRTA Local Unit does not have a bank account and had no income or expenses. Please sign and complete contact information at the bottom of the page.
- Option 1. Our MRTA Local Unit wishes to report MRTA Local Unit transactions through the MRTA State Office (Parent Organization). **Please complete the bottom of this page and answer questions on page 2.**

NOTE: If your unit has a Federal I.D. Number, please provide that number if reporting through the MRTA State Office.

NOTE: If you have more than one account (e.g. regular checking, savings account, scholarship fund) please use a separate form for each account.

- Option 2. Our MRTA Local Unit will be filing a separate form 990 or 990N. We will not be reporting transactions to the MRTA State Office (Parent Organization). Please complete bottom of the form and return.

Name of Officer submitting information: _____

MRTA Title: _____ **Date:** _____

Contact Phone #: _____

Contact e-mail: _____

***FORM MUST BE COMPLETED AND POST-MARKED TO MRTA STATE OFFICE BY
FEBRUARY 28***



**MISSOURI RETIRED TEACHERS ASSOCIATION
and Public School Personnel**
MRTA Local Unit I.R.S. Filing Requirements – Tax Year _____
Page 2

OPTION 1 REPORTING PORTION

MRTA Unit Name: _____
(please print)

Federal I.D. # _____

**NOTE: If your unit has more than one account (e.g. checking, savings, scholarship etc),
please use a separate form for each account.**

January 1 Bank Balance _____

Statement of Income during the tax year

Can be consolidated by category, for example: (Membership Dues Collected; Fundraisers;
Donations received, etc.)

Membership Dues Collected _____

Donations Received _____

Fundraisers _____

Interest earned _____

Meeting/Meals/Activities Income _____

Other, Please list _____

Statement of Expenses during the tax year

Can be consolidated by category.

Donations Given _____

Scholarships Given _____

Meeting/Meals/Activities Expenses _____

Supplies (i.e. postage, paper, envelopes, copying) _____

Other, Please list _____

December 31 Bank Balance _____

(Please note this example: January 1 Bank Balance **plus** Income **minus** Expenses = December 31 Bank Balance)

Unit of Excellence Program

The MRTA Unit of Excellence program is a voluntary program that is designed to help guide and direct local unit leaders, as well as, recognizing MRTA units that are going above and beyond the call of duty. Through the years, local unit leaders have found the guidelines to be a valuable tool in the management of their unit. To receive this award, a local unit must answer, "yes" to 25 of 28 questions.

We encourage all Units to become an MRTA Unit of Excellence each and every year. Please feel free to contact your Regional Vice President for assistance and to answer any questions you may have.



MISSOURI RETIRED TEACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL
3030 DUPONT CIRCLE
JEFFERSON CITY, MO 65109
1-877-366-6782
WWW.MRTA.ORG

MISSOURI RETIRED TEACHERS ASSOCIATION AND PUBLIC SCHOOL PERSONNEL UNIT OF EXCELLENCE PROGRAM

The MRTA Unit of Excellence program is a voluntary program based on the honor system that is designed to help guide and direct local unit leaders, as well as recognizing MRTA units that are the best in the state.

These units epitomize the core values of our association, showcasing unwavering dedication, collaboration, and a profound commitment to the well-being of retired teachers and the advancement of education.

The designation of Units of Excellence serves as a testament to the remarkable work and collective efforts demonstrated by these units. Their consistent efforts extend beyond the ordinary, as they actively contribute to our association's mission, offering valuable resources to our members and advocating for the needs of retired educators.

These units stand as shining examples of what can be accomplished when members unite with a shared purpose. Not only do they provide essential support, but they also serve as inspirational hubs where members collaborate, share their expertise, and tirelessly work towards enhancing the lives of retired education personnel.

Through the years, local unit leaders have found the guidelines to be a valuable tool in the management of their unit. To receive this award, a local unit must answer, "yes" to 25 of 28 questions, and answer "yes" to number one in the MRTA Unit Membership Criteria.

We encourage all units to become an MRTA Unit of Excellence each and every year. Please feel free

This application was submitted by:

(Name)

(Unit Name)

(Phone Number)

(Email Address)

*Signature of Regional
Vice President*

*Please be aware this application
must be signed before submission
to MRTA Office.*

Does your unit want to receive (please check one):

MRTA Unit President Handbook

Trophy OR

Certificate

55

INSERT NAME & REGION OF LOCAL UNIT MAKING APPLICATION

OF THE

MISSOURI RETIRED TEACHERS ASSOCIATION AND PUBLIC SCHOOL PERSONNEL

CRITERIA FOR UNIT OF EXCELLENCE AWARD

ALL QUESTIONS MUST BE ANSWERED

<u>MRTA UNIT MEMBERSHIP CRITERIA</u>	YES	NO
***1. Did the unit provide new retiree lists for all the school districts in your unit's area to the MRTA State Office? A goal would be before July 30th.	<input type="checkbox"/>	<input type="checkbox"/>
2. Did the unit host recruitment activities for new retirees such as formally inviting, recognizing, and welcoming new members at unit meetings?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did the unit sponsor at least one annual active or retired teacher appreciation activity?	<input type="checkbox"/>	<input type="checkbox"/>
4. Has the unit sent at least one form of communication to prospective members?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are at least 80% of your unit's members current paid members of the MRTA State Association? An MRTA membership list will be mailed to the Unit President upon request for comparison to your unit's membership list.	<input type="checkbox"/>	<input type="checkbox"/>
6. Was an organized local membership drive conducted that included a membership goal for the year?	<input type="checkbox"/>	<input type="checkbox"/>
7. Did the unit membership show an increase over the previous year as of December 31?	<input type="checkbox"/>	<input type="checkbox"/>
8. Did the unit membership committee utilize the membership list which was provided by the MRTA State Office?	<input type="checkbox"/>	<input type="checkbox"/>
<u>MRTA UNIT MEETING CRITERIA</u>	YES	NO
1. Did the unit have at least 6 gatherings, field trips, executive board or regional meetings, etc. last year?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the unit have Committee Chairpersons for the Legislative, Membership, Community Service, Information & Protective Services, and Retirement Education committees?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did unit directories, either electronic or hard copy, contain meeting dates, time, program, and the MRTA Mission and Vision statements? Was it distributed to unit members, Regional Vice Presidents, and the MRTA State Office?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do your unit meeting minutes reflect that your committee chairs prepared and presented a report for each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
5. Were members contacted prior to each meeting?	<input type="checkbox"/>	<input type="checkbox"/>
6. Were pertinent communications from the MRTA State Office presented to membership and/or acted upon at each meeting?	<input type="checkbox"/>	<input type="checkbox"/>

INSERT NAME & REGION OF LOCAL UNIT MAKING APPLICATION

<u>MRTA UNIT ADMINISTRATIVE CRITERIA</u>	YES	NO
1. Did the unit have email address distribution lists to contact local membership?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the MRTA State Office have a current copy of the unit Bylaws on file?	<input type="checkbox"/>	<input type="checkbox"/>
3. Are the unit officers and committee chairs all current paid members of MRTA?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did the unit submit an updated <i>Local Unit Officers Report</i> to the MRTA State Office by January 15?	<input type="checkbox"/>	<input type="checkbox"/>
<u>PROGRAM CRITERIA</u>	YES	NO
1. Did the unit president attend the MRTA Unit President Summit?	<input type="checkbox"/>	<input type="checkbox"/>
2. Did a unit member attend the State MRTA Annual Meeting?	<input type="checkbox"/>	<input type="checkbox"/>
3. Did a unit member attend the State Delegate's Assembly?	<input type="checkbox"/>	<input type="checkbox"/>
4. Did a unit member attend the annual regional meeting?	<input type="checkbox"/>	<input type="checkbox"/>
5. Did unit members attend the MRTA Legislative Day event, participate in Capitol Blitz Day, or visit their respective elected officials at the State Capitol?	<input type="checkbox"/>	<input type="checkbox"/>
6. Did unit members participate in a Unit Community Service Project and report all volunteer hours (state and local) to the Regional Community Service Chairperson?	<input type="checkbox"/>	<input type="checkbox"/>
7. Did a Superintendent of Schools or an elected official such as a state representative, state senator, or school board member attend a unit meeting?	<input type="checkbox"/>	<input type="checkbox"/>
8. Did the MRTA President, or the Executive Director, or your Regional Vice President attend a unit meeting?	<input type="checkbox"/>	<input type="checkbox"/>
9. Did the unit participate in the MRTA Distinguished Retiree of the Year Program?	<input type="checkbox"/>	<input type="checkbox"/>
10. Did the unit publish a local newsletter, send out e-news, or develop a website, Facebook page or group?	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL NUMBER OF "Yes/No" ANSWERS ALL QUESTIONS MUST BE ANSWERED	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>

***** This criteria is required to be checked "yes" to receive the Unit of Excellence Award.**

Distinguished Retiree Program



**MISSOURI RETIRED TEACHERS ASSOCIATION AND PUBLIC SCHOOL PERSONNEL
DISTINGUISHED RETIREE AWARD**

**DEADLINE: Nominations for the MRTA Distinguished Retiree Award
must be post-marked on or before June 30 each year.**

(Please note: The application and rating criteria were revised in 2013.)

The MRTA Distinguished Retiree Award program is conducted by the Missouri Retired Teachers Association and Public School Personnel. MRTA is interested in recognizing members who have given service beyond the call of duty. The first MRTA Distinguished Retiree Award was presented in 2001. At the request of our members, the MRTA Board of Directors approved recommendations making several changes to eligibility, application submission, and rating criteria for nominations. It is our hope these changes have leveled the playing field and will encourage, reward, and recognize participation within our MRTA Local Units--the grassroots of MRTA. Your unit is encouraged to make **one** nomination. Please mail your nomination to: **MRTA DISTINGUISHED RETIREE NOMINATION, 3030 DuPont Circle, Jefferson City, MO 65109.**

The Missouri Retired Teachers Association and Public School Personnel Board of Directors established a procedure to select an MRTA Distinguished Retiree. Enclosed are specific guidelines and a nomination form.

One finalist from each of the fourteen regions will be selected by a committee of MRTA Regional Vice Presidents which will not include the Regional Vice President of the home of the nominee. The winner will be one of the fourteen finalists and will be selected by a committee of at least five statewide education associations. The fourteen regional finalists will be invited to attend our Annual Meeting which is held in September each year to receive an award and be recognized.

The deadline for submitting your nomination for the MRTA Distinguished Retiree Award is June 30 each year.

If you have any questions, please feel free to call the office toll-free at 1-877-366-6782 or email us at mрта@morta.org.

1. Lodging and mileage expense will be paid for the fourteen regional finalists.
2. The MRTA Distinguished Retiree will receive a Patio Brick at the MRTA Office Facility in their honor.
3. The fourteen regional finalists will be invited to a recognition luncheon to be held during our Annual Meeting which is held in September each year at the Capitol Plaza Hotel, Jefferson City, MO. The fourteen regional finalists will also be recognized at their regional meetings.



**MISSOURI RETIRED TEACHERS ASSOCIATION AND PUBLIC SCHOOL PERSONNEL
DISTINGUISHED RETIREE AWARD**

GUIDELINES

WHO IS ELIGIBLE?

Any MRTA member may be nominated except any current member of the MRTA Board of Directors. The nominee must be retired not less than three years and an MRTA member at least three years.

- *Unsuccessful nominees may be nominated in subsequent years; however, they are encouraged to submit an updated application.*

HONORS

The selection for the MRTA Distinguished Retiree Award will be determined by a committee of education associations not affiliated with MRTA. The fourteen regional finalists will be recognized at a recognition luncheon during the MRTA Annual Meeting. The fourteen regional finalists will also be recognized at their regional meetings.

SUBMITTING YOUR PACKET

It is recommended that you submit the original copy of your application. The pages should be typed on one side only. Other materials may be included in your application as long it is within the maximum number of six (6) pages allowed. See details below.

HOW TO PREPARE THE APPLICATION

- **DOCUMENTS REQUIRED THAT DO NOT COUNT TOWARD THE 6 PAGE LIMIT.**
 1. Personal photograph.
 2. Application cover sheet (Use enclosed application form).
 3. One letter of nomination from your local MRTA Unit signed by a Unit Officer.

- **DOCUMENTS REQUIRED THAT COUNT TOWARD THE 6 PAGE LIMIT. Applications are judged on a 100 point system as follows:**
 4. Professional Biography..... (15 points)
 5. Contributions to Public Education **since retirement**..... (15 points)
 6. Describe your MRTA involvement **since retirement**
 - a. State..... (5 points)
 - b. Region..... (5 points)
 - c. Local..... (30 points)
 7. Describe your community service work **since retirement** through service-oriented activities such as volunteer work, church/civic activities, etc... (30 points)
 8. Applications must be post-marked by **June 30**. Please mail your nominations to:

**MRTA DISTINGUISHED RETIREE NOMINATION
3030 DuPont Circle
Jefferson City, MO 65109**

**MISSOURI RETIRED TEACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL
MRTA DISTINGUISHED RETIREE AWARD**



Date: _____

Nominee Name (as you wish it to be printed on your award):

Home Address: _____

Telephone: _____ E-mail: _____

MRTA Membership Number: _____ (Call MRTA Office toll-free 1-877-366-6782 if not known)

Total years as an MRTA Member (3 years minimum): _____

Total years retired (3 years minimum): _____

I hereby give my permission that any or all of the attached materials may be shared with persons interested in promoting the MRTA Distinguished Retiree Award Program.

Signature of Nominee: _____

Nominated by (Unit Name): _____

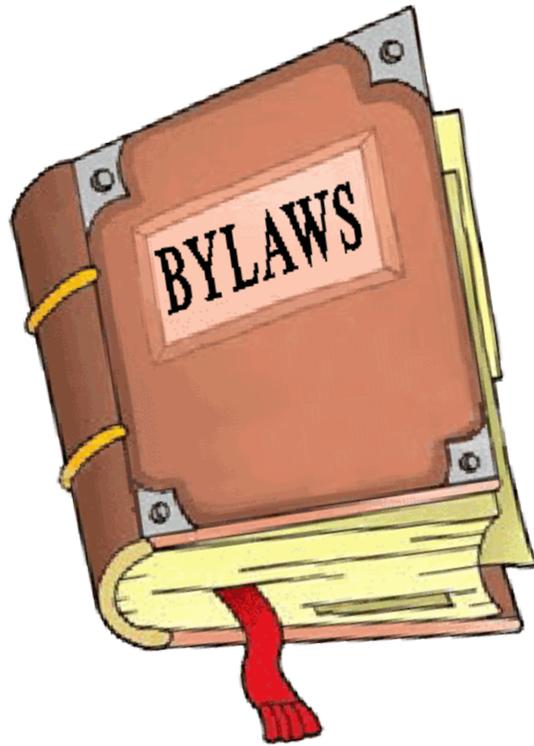
Signature of Local Unit Officer: _____

Attach documents, letter of nomination, photograph, and other requirements to this application.

*This cover page does not count toward the six page limit.

Sample By-Laws

(For new MRTA Units or for Units who need a By-Law revision only. An editable Microsoft Word version of this form is available, by request, from the MRTA Office.)



PROPOSED EXAMPLE AND DRAFT OF LOCAL UNIT BYLAWS

BYLAWS

**(Name of County or Unit Name) COUNTY RETIRED TACHERS ASSOCIATION
AND PUBLIC SCHOOL PERSONNEL**

ARTICLE I NAME:

The name of the Association shall be the (Name of County of Unit Name) County Retired Teachers Association and Public School Personnel.

ARTICLE II Purpose of the Association shall be to support the endeavors of the Missouri Retired Teachers Association and Public School Personnel.

- (a) To promote continued interest in the teaching profession and the cause of education.
- (b) To promote the economic, social and professional status of the retired teacher and other school personnel.
- (c) To promote passage of legislation of benefit to retired teachers and other school personnel.
- (d) To promote the involvement of retired teachers and other school personnel in community affairs.
- (e) To foster good fellowship among retired teachers and other school personnel and concerns with their well being.

ARTICLE III MEMBERSHIP:

- (a) Membership shall be open to all retired teachers of public, private, and parochial schools, college and universities, administrators, supervisors, and other retired school employees. (b) Spouses of members, active teachers and others interested in education may become associate members without the right to vote, hold office or represent the Association.
- (c) Any member in good standing having attained the age of 100 shall be granted Century membership at no cost.

ARTICLE IV MEETINGS:

- (a) The Association shall hold a meeting once a month excluding the month of July and August. Meetings are to be held on the third Thursday of the month.
- (b) Seven members shall constitute a quorum for a meeting.

ARTICLE V DUES:

- (a) State dues for active, associate and life members shall be determined by the Assembly of Delegates upon the recommendation of the State Executive Board. State dues are to be paid at the beginning of the fiscal year to the MRTA. The fiscal year for MRTA begins on January 1 and ends on December 31. New members paying dues after May 1 may regard their dues paid through the next fiscal year.
- (b) Local dues shall be set by the membership of the Local Association. Local dues shall be paid at the beginning of the fiscal year – January 1.

ARTICLE VI OFFICERS:

- (a) All unit officers shall be current paid members of both the local and the State MRTA.
- (b) Elective officers shall be President, President Elect, Second Vice President, Recording Secretary and Treasurer.
- (c) Officers shall serve for a period of two years, and may be reelected if they consent to serve.
- (d) Officers shall be elected at the November meeting, installed at the December meeting and shall take office in January.
- (e) Members of the Executive Committee shall be the President, President Elect, 2nd Vice President, Recording Secretary, Treasurer and the Immediate Past President.

ARTICLE VII DUTIES OF OFFICERS:

- (a) The President shall preside at all meetings of the Association and serve as an ex-officio member of all committees except the Nominating Committee, appoint all committee chairmen and members, and fill all vacancies until the next regular election.
- (b) The President Elect shall assist the President in every way possible, act as President in the absence of the President and shall serve as the Chairman of the Program Committee.
- (c) The Second Vice President shall assist the President and President Elect and in their absence shall act in their stead.
- (d) The Recording Secretary shall keep the minutes of the Local Association and of the Executive Board meetings. The Recording Secretary shall keep all minutes and correspondence on file for future reference.
- (e) The Treasurer shall handle all local dues and all local special funds. The Treasurer shall make payments of all Association bills and shall keep an accurate accounting of funds. The Treasurer shall serve as chairman of the membership committee.
- (f) The Executive Committee's shall monitor the Unit's activities and programs and to assist the President as needed.

ARTICLE VIII COMMITTEES

- (a) All Committee chairs shall be current paid members of both the local unit and the State MRTA.
- (b) Standing Committees shall be Membership, Legislation, Community Participation, Information and Protective Services, Retirement Planning and Health Care. Chairmen and Members shall be appointed by the President and shall serve for the duration of the President's term.
- (c) Special Committees are appointed by the President to serve for the duration of the President's term.

- (a) The delegate(s) to the MRTA Delegate Assembly shall be elected from and by the local Unit.
- (b) Each local Unit shall be entitled to one delegate for the first (1) to 100 MRTA and local members and to one additional delegate for each additional 100 MRTA and local Unit members or major fraction thereof as of June 1.
- (c) Active members whose State and local Unit dues are paid shall be eligible to serve as delegates.
- (d) The local Unit President shall send to the MRTA headquarters the name/names of the delegates and alternates elected by their unit by June 15.

ARTICLE X PARLIAMENTARY PROCEDURE:

Except as otherwise provided in the Bylaws, all questions of parliamentary procedure relating to this Association shall be governed by Robert's Rules of Order.

ARTICLE XI AMENDMENTS:

This Constitution may be amended at a regular meeting by a majority vote of members present, provided that the notice of such amendments has been approved by the Executive Board and printed copies distributed to the membership at least one month prior to the vote.

Revised (Date)

MRTA HISTORY

BRIEF HISTORICAL BACKGROUND OF EDUCATION IN MISSOURI DEVELOPMENT OF THE PUBLIC SCHOOL RETIREMENT SYSTEM AND MISSOURI RETIRED TEACHERS ASSOCIATION

1960–2003 Author Unknown

2003-Present by Jim Kreider, Executive Director, MRTA

We need to look back at MRTA history to see how far we've come. For 41 years, the only source of funds for Missouri schools as a territory and as a state was from the Federal Grant through a land grant (no deed, no patent). Much work went on to even get that grant. One example: In 1804, Mr. Thomas Reddick from St. Louis rode horseback to Washington D.C. (at his own expense) to plead for passage of the Act granting land for schools.

And it was 52 years before local funds could be levied for schools. Then, for 70 years (1887 to 1956) only 1/3 of the ordinary revenue was used for schools.

So much background and work has been done on the development of education for schools of Missouri. During the great depression, teachers sometimes were not paid for the last two months of school.

A Few Highlights:

The development and adoption of the fourth Missouri Constitution in 1945 was very important to education. A significant change was the establishment of an appointed State Board of Education which was then given the power to appoint a Commissioner of Education.

Superintendent Hubert Wheeler of Marshall, Missouri, was appointed the first Commissioner of Education. The maximum salary was \$5,000. Consolidation of schools was implemented during his leadership in 1949. As a result of this reorganization, the County Superintendent of Schools was abolished.

Many improvements in education have been made. State aid became available. The foundation program and cigarette tax were of much benefit to education, with the funding formula being increased several times.

Special Education became an area of need. For the handicapped, area schools for the trainable were established in 1957. Important programs for all handicapped, including home instruction and transportation, were attained in 1959. Programs for the emotionally disturbed came in 1968 and compensatory education in 1969.

Beginning of the PSRS of Missouri

August 7, 1945 -The Public School Retirement Act of Missouri became effective after approval of the legislation and signed by Governor Forrest C. Donnell.

July 1, 1946 - The PSRS of Missouri was created. Missouri was the 47th state to adopt legislation leading to a State teachers' retirement system.

Mr. Everett Keith was instrumental in setting up the PSRS system. Teachers were permitted to vote at that time whether to receive Social Security or straight retirement. They voted to receive straight retirement.

August 1, 1947 - The first benefit check in the amount of \$31.45 was issued to 75-year-old Benjamin Rea of Buffalo, MO.

October 13, 1965 - The forerunner of PEERS, the Non-Teacher School employee Retirement System of Missouri (NTRS) was created with the adoption of HB 88.

MRTA History

Many retired teacher groups had organized over the state. The Missouri Retired Teachers Association and Public School

MRTA HISTORY

Personnel was organized in December 1960 by a group of eleven retired teachers meeting in Jefferson City, Missouri at the Governor Hotel. The five school system areas represented were St. Louis City, St. Louis County, Columbia, Lebanon and Springfield.

Mr. Thomas Babb, a retired teacher from Springfield was elected president.

- Constitution was drawn and approved by the initial members.
- Dues were established at \$1 a year due January 1st.
- A question arose, "Should we be bonded???"

In 1964, Mr. Babb was appointed the National Retired Teachers Association Director of Missouri. Dr. Ethel Andrus was the President of the NRTA at the time. A quote from Dr. Andrus, "Do something outside yourself. Make life richer by your efforts and ideas. As teachers, we have the most marvelous experience in the world."

Minutes of the March 1962 State Meeting showed 2,549 retired teachers in Missouri. This did not include St. Louis and Kansas City. MRTA membership at the time showed 649 members.

In 1972, a very important legislative change was made in that final average salary would be determined on the basis of total earnings for the five consecutive years instead of 10 consecutive years.

In 1980, MRTA was incorporated as a 501(c)(4) not-for-profit corporation.

MRTA is Missouri's largest and only Education Association where the Public School Retiree is the #1 priority. Our motto is: "To Serve, Not to be Served."

MRTA is an affiliate of NRTA (National Retired Teachers Association, AARPs Education Community).

SINCE 1975-MRTA HAS BEEN INSTRUMENTAL IN PASSING THE FOLLOWING:

1975 - First COLA (Cost of Living Adjustment). Retirees and beneficiaries of PSRS of Missouri who retired prior to 9/1/72 received an increase in benefits amounting to 2% per year.

1980 - Increased the maximum annual COLA from 2% to 4%.

1981 - MRTA supported legislation which gave COLA to certain persons receiving benefits from the Kansas City and St. Louis Retirement Systems.

1983 - A very important passage of legislation made it possible for retired teacher members and retired members of the non-teacher employees to vote for members of the Board of Trustees of the Public School Retirement System/Public Education Employee Retirement System of Missouri.

1984 - COLA ceiling raised from 24% to 32% for members of PSRS.

1986 - Increased lifetime COLA from 32% to 40% for retired members of the PSRS of Missouri.

1987 - Retirement benefit of \$300 per month by PSRS of Missouri if member had 20 years of creditable service. Teacher retirees have a right to participate in health insurance.

1989 - Increased lifetime COLA from 49% to 52% for teacher retirees. \$300 minimum Regular Retirement benefit for at least 20 years of credit.

1990 - Increased the monthly minimum to \$600 per month with a minimum of 20 years of service, and increased the lifetime COLA cap from 52% to 56%. Also increased the lifetime COLA for non-teacher retirees from 32% to 44%.

MRTA HISTORY

1991 - Annual COLA cap increased to 5%. \$600 minimum Regular Retirement benefit for at least 20 years of credit. Full formula factor used for members at least age 55 with at least 25 years of credit. Survivor benefit payments increased.

1992 - Sponsored Retired Teachers Day which is celebrated the 2nd Wednesday in June. Legislation was also passed to change the COLA increase from 56% to 65% for members of PSRS effective 1995.

1993 - Pop-Up Provision for PSRS and improvements for non-teacher retirees: age 55 and 25 years and out, COLA from 4%-5%, and lifetime COLA increased from 44% to 56%, and improvements in Kansas City and St. Louis retirement systems.

1994 - \$800 per month for teachers with 25 years of creditable service. Full formula factor increased to 65% to become effective January 1995. Part-time or temporary substitute hours allowed for retirees increased to 550.

1995 - 25 and out modified formula factors initiated through July 1, 1998. \$600 minimum Regular Retirement benefit for at least 15 years of credit. \$800 minimum Regular Retirement benefit for at least 20 years of credit. \$1000 minimum Regular Retirement benefit for at least 25 years of credit. \$1100 minimum Regular Retirement benefit for at least 30 years of credit. \$2 times years of credit (maximum \$60) increase for all retirees. Joint and Survivor Options revised and Term Certain Options initiated.

1996 - Increased lifetime COLA cap to 75% for PSRS, removed the \$24,000 salary cap for supplemental benefits, and increased minimum benefits for 30-year PSRS members to \$1,200. **Supported amendments to St. Louis Retirement System.**

1997 - Changed retiree payment date to last working day of the month.

1998 - A Coalition was formed made up of the following groups: MRTA, NEA, MSTA, MAAS, MAESP, MASSP, AFT, and MACC. An actuarial study was made. Legislation provided 8.7% increase to all teacher retirees and beneficiaries. Increased non-teacher lifetime COLA from 65% to 75%. Full formula factor increased to 2.5%. 25 and out window extended through July 1, 2000. 25 and out formula factors increased.

1999 - Legislation provided monthly benefit of \$5 times the number of years of service to those who retired prior to July 1, 1999, and created a new \$5,000 death benefit. Also provided a 7.4% increase for non-teacher retirees. Final Average Salary changed to 3 years. Rule of 80 implemented. \$5000 death benefit implemented. \$5 times years of credit increase for all retirees. Survivor benefit payments increased. 50% earnings limitation included for working after retirement. Special vesting initiated for a retiree with one year of credit.

2000 - Legislation passed which included a 3.5% increase in retirement benefits for all teacher retirees and beneficiaries and increased the COLA from 75% to 80%. Also provided a 3.4% increase for all non-teacher retirees. 25 & out window extended through July 1, 2003. Lifetime COLA cap increased to 80%. COLA effective on 3rd January after retirement. An important change for MRTA was the appointment of delegates and delegate assembly for the annual fall meeting. Each region elected its own vice president.

2001 - COLA effective on 2nd January after retirement. Formula factor of 2.55% initiated if at least 31 years of credit through June 30, 2008. \$3 times years of credit increase for all retirees.

2003 – Partial Lump Sum Option (PLSO) initiated. 10.5% teacher contribution floor enacted meaning no retirement increases until teacher contributions are back to 10.5% or less.

2005 - 2.55% formula extended through July 1, 2008. 25 & out window extended through July 1, 2008. MRTA supported the name change of the NTRS to Public Education Employees Retirement System (PEERS).

2007 - 25 and out window extended through July 1, 2013. 2.55% formula factor extended through July 1, 2013. MRTA sponsored "SPIKING" regulation was enacted limiting Final Average Salary (FAS) to no more than 10% per year for the last three years of employment.

MRTA HISTORY

2007 - MAJOR LEGISLATION: MRTA sponsored Missouri income tax exemptions for education retirees. HB 444 had a six year phase in exempting 100% of \$32,500 of retirement income per person. Also MRTA sponsored 100% tax deduction for education retirees of Long Term Care Insurance premiums and 100% deduction of any out-of-pocket health insurance premiums. Also Final Average Salary (FAS) was regulated.



2010 – MRTA defeated the language of SB 1050 at three different times and once being in a special session of the Legislature. MRTA delivered over 200 MRTA members to the House Retirement Committee hearing in opposition to SB 1050. SB 1050, sponsored by Senator Jason Crowell(R - Cape Girardeau), proposed the creation of a State Investment Board/Company combining all public pension systems. This was a STATE TAKEOVER of Education’s \$30-plus billion funds!

2011 – MRTA defeated a proposal to put Educators into a 401K type retirement system.

2012 – MRTA defeated SB 842, a proposal to take away the decision process of the PSRS/PEERS Board of Trustees and put it in the hands of the Legislature.

2013 – MRTA organized a signature petition campaign to stop the passage of four Senate Bills (SB 221, SB 475, SB476, and SB 477)introduced by Senator Lamping (R - St. Louis County). In 12 days, over 30,000 signatures were collected and delivered to the Senate Pensions Committee. These bills never came to a vote because of the orchestrated efforts of MRTA.



2014 – MRTA initiated a Call to Action encouraging members to contact their State Representatives to vote “No” on HCS SCS SB 672, with an amendment requiring PSRS/PEERS to invest 2% to 5% of their assets in a venture capital firm that is organized or incorporated in Missouri or has its principal place of business in Missouri. MRTA was **instrumental** in defeating Amendment 3. Amendment 3 was a ballot initiative removing tenure and connecting teacher pay to standardized testing.

2017 - MRTA initiated and was successful in enacting HB 305 and SB 394 which allowed divorcees to “pop up” to single benefits and remove ex-spouses as beneficiaries.

2019 - MRTA “squashed” HB 864 - the most dangerous legislation in the past 30 years to educator pensions. The legislation would have allowed all educators the choice of the Defined Benefit plan educators enjoy today or a misleading 401(k) plan that would have been detrimental to the PSRS/PEERS system as well as the educator in the long run.

MRTA also initiated and was successful in enacting HB 723 and SB 17 which were similar to HB 305 and SB 394 of 2018. This legislation had the same effect as the 2018 bills but were made retroactive so that educators divorced before August 2017 could also take advantage of the “pop up” benefit.

OTHER HISTORIC EVENTS AT MRTA

2001 - The MRTA Board of Directors decided to form a tax deductible corporation, 501(c)(3), called the Missouri Retired Teachers Foundation (MRTF). This charitable corporation is the fundraising arm of MRTA.

2003 - MRTA employed the first full-time Executive Director at MRTA, Mr. Jim Kreider, former Speaker of the House from Nixa, Missouri.

2004 - MRTA Board of Directors decided to move the MRTA office from Columbia, MO, to Jefferson City, MO home of the state capitol and the PSRS/PEERS retirement system.

2005 - MRTA and MRTF purchased property in a prime location for a future permanent office facility.

2006 - The MRTA Board of Directors decided to build the new permanent office facility.

2008 - MRTA elected the first PEERS retiree or support staff retiree as MRTA President, Maggie Elder of St Joseph, Missouri.

2009 – MRTA/MRTF moved into the permanent new office facility.

2010 MRTA celebrated its 50th birthday!

2012 – Mortgage on Office Facility paid in full. Mortgage Burning Ceremony held at 2012 Annual Meeting.

2012 – In honor of his leadership and major fundraising efforts and by Proclamation of the MRTA and MRTF Board of Directors, the classroom center in the new office facility was officially named The Jim Kreider Classroom and Learning Center during the September 12, 2012 Annual Meeting in Jefferson City, Missouri.

2014 – MRTA members donated over \$100,000 in fundraising campaign to install an elevator in the MRTA-MRTF Office Facility. Official installation completed June 2014.

2020 - MRTA Redesigns its logo. Association Member Benefits Advisors (AMBA) starts as MRTA's new member benefit provider. Vilocity and AMBA provided MRTA with a new website. Due to COVID-19 MRTA starts hosting virtual meetings. MRTA also celebrated its 60th Anniversary!

2022 - MRTA hires Maria Walden as Executive Director.





MRTF

Missouri Retired Teachers Foundation
MRTA's Charitable Giving Arm

MRTF

The Missouri Retired Teachers Foundation (MRTF) is a tax exempt 501(c)(3) charitable corporation devoted to raising funds to carry out certain charitable, educational, scientific and literary purposes of the Missouri Retired Teachers Association and Public School Personnel (MRTA). As a result, donations to the Foundation are tax deductible.

The Foundation, established in 2001, partners with MRTA to raise funds for Classroom Grants and other charitable efforts. The Foundation, thanks to the generosity of MRTA members, has been successful in raising funds to build an office facility which houses the Foundation and the Association in Jefferson City, Missouri.



The MRTF GRANT PROGRAM continues to be the major emphasis for our fundraising efforts. This year, 2022, the Board of Directors has set a goal of awarding \$500 grants to 126 teachers and 20 support staff members.

The Foundation continues to maintain three major fundraising activities, the MRTF \$10,000 Raffle, the Silent Auction at the MRTA September Annual Meeting and the Year-End-Ask letters.

This grant program also provides opportunity for MRTA local units to gain exposure and recognition for their local units. Unit leaders are encouraged to take copies of the Classroom Grant applications to their local schools in April.



**MISSOURI RETIRED TEACHERS FOUNDATION (MRTF)
 THE MRTF CLASSROOM GRANT PROGRAM
 2024 APPLICATION – COVER SHEET**

Deadline: The grant application cover sheet and sections 1-4 materials must be postmarked no later than **June 30th (include two (2) copies of everything)**.

Funds: Funds may be appropriated in the areas of resources or materials used by an active Missouri public school teacher for the benefit of Missouri's Public School students. 84 grants will be awarded. All grants will be in the amount of \$500.

Winners: Winners will be notified by August 31st. A video report or one-page summary report from the grant recipient is due to the MRTF office by April 15th.

APPLICANT'S INFORMATION	
Applicant's Full Name:	
Applicant's Home Address:	
Applicant's Phone Number:	
Applicant's Personal Email:	
Grade(s) Taught:	
Subject(s) Taught:	
SCHOOL DISTRICT'S INFORMATION	
School District:	
School's Name:	
School's Address:	
School's County:	



MISSOURI RETIRED TEACHERS FOUNDATION (MRTF) THE MRTF CLASSROOM GRANT PROGRAM 2024 APPLICATION – SECTIONS 1-4 & INSTRUCTIONS

Section 1: Title and Description (in 100 words or less)

- Title
- Project description – evidence, rationale, and impact on students
- Grade(s) taught, subject(s) taught, and number of students served

Section 2: Purpose of the Project

- Goals and objectives
- Specifics
- Measurables

Section 3: Planning

- Action plan
- Dates and timeframe

Section 4: Budget

- List of materials, supplies, and/or equipment needed
- Total price and detailed prices of materials, supplies, and/or equipment needed
- Suppliers needed to complete the project

Instructions:

- Grant application submitted must include a completed cover sheet with the two (2) required signatures and sections 1-4 materials
- Keep sections 1-4 to a maximum of five (5) pages
- Applicant must turn in two (2) copies of the completed grant application
- Grant application must be postmarked to the MRTF office by June 30th (*address on letterhead*)



**MISSOURI RETIRED TEACHERS ASSOCIATION
FOUNDATION (MRTF)
THE MAGGIE ELDER MEMORIAL
PEERS/SUPPORT STAFF GRANT PROGRAM
2024 APPLICATION – SECTIONS 1-4 & INSTRUCTIONS**

Section 1: Title and Description (in 100 words or less)

- Title
- Project description – evidence, rationale, and impact on students

Section 2: Purpose of the Project

- Goals and objectives
- Specifics
- Measurables

Section 3: Planning

- Action plan
- Dates and timeframe

Section 4: Budget

- List of materials, supplies, and/or equipment needed
- Total price and detailed prices of materials, supplies, and/or equipment needed
- Suppliers needed to complete the project

Instructions:

- Grant application submitted must include a completed cover sheet with the two (2) required signatures and sections 1-4 materials
- Keep sections 1-4 to a maximum of five (5) pages
- Applicant must turn in two (2) copies of the completed grant application
- Grant application must be postmarked to the MRTF office by June 30th (*address on letterhead*)

Thank you for your interest and intent to further the excellence of education in Missouri. The MRTF office will notify all winners and nonwinners with a mailed letter by August 31st. If you have questions or concerns about the application process, please contact the MRTF office at (877) 366-6782. Applications may be downloaded via MRTF's website at <https://mortf.com/grants/apply-for-grant/>. **Please make sure to select the correct grant application as we have two (2) different grant programs – one for classroom teachers and one for support staff/PEERS members.**

PEERS/SUPPORT STAFF:
Secretaries, Bus Drivers,
Cooks, Custodians,
Nurses, etc.

By giving, you leave a legacy; you create a memory that will not fade.

MRTF is a 501(c)(3) President of the Foundation for a charitable corporation.

In Closing

We hope you have found this MRTA Unit President's Handbook helpful in guiding you through your Unit Presidency. We included as much as we could without completely overwhelming you with information. If you have any questions please do not hesitate to contact us and ask!