

# **2023 MRTA Unit President Handbook**

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



**MISSOURI RETIRED TEACHERS ASSOCIATION  
AND PUBLIC SCHOOL PERSONNEL**

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

**[www.mrta.org](http://www.mrta.org)**

**1-877-366-6782**

**[mrta@mrta.org](mailto:mrta@mrta.org)**

*February 2023*

### **MRTA Mission**

The vision of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to promote and protect pensions, programs, and benefits of all public school personnel in retirement.

### **MRTA Vision**

The mission of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to grow membership and work actively with government and its entities so that all public school personnel will be secure economically, socially, and professionally in retirement.

### **MRTA Moto**

*"To Serve, Not To Be Served."*

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# 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!

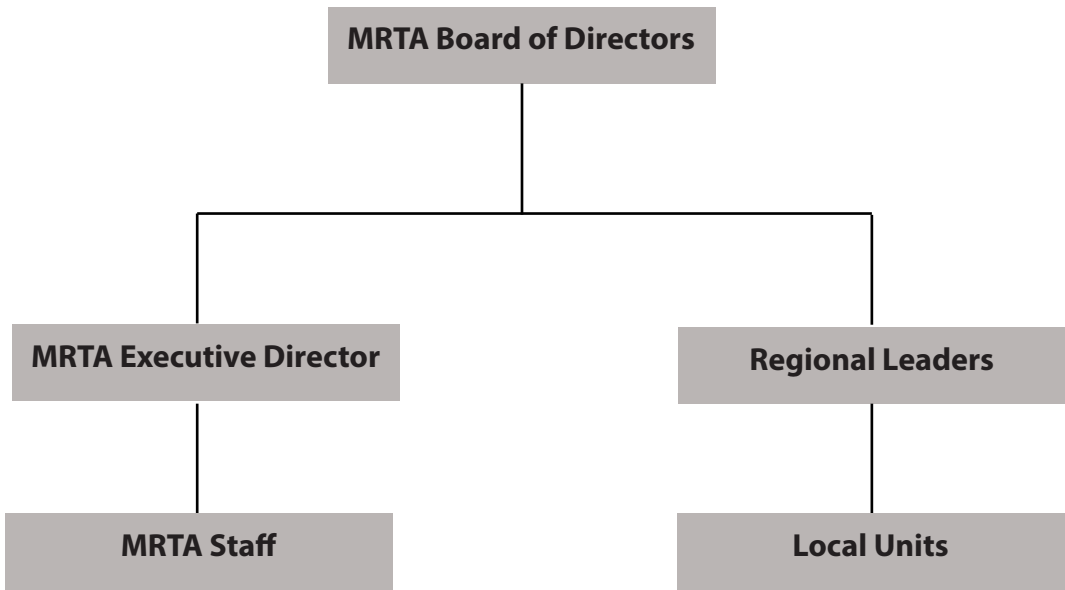
## What is MRTA?

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.

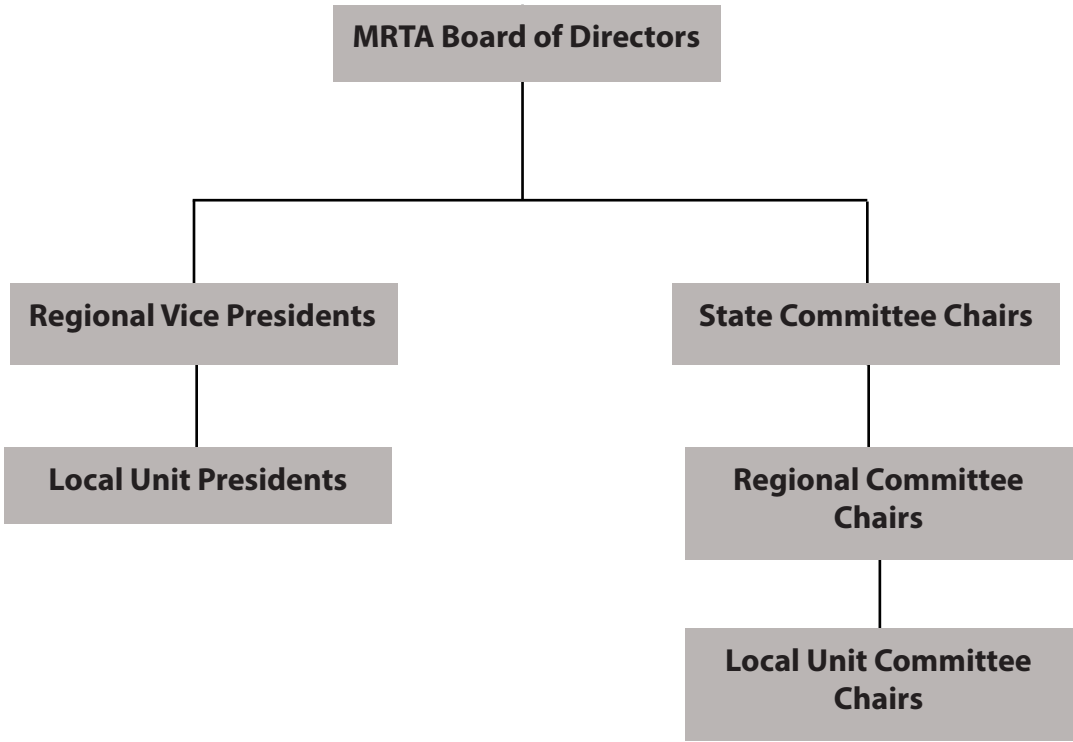
MRTA works through a grassroots approach to lobbying and with membership in the Association! "Strength in Numbers" is our key to success! We rely on our members to make phone calls, email, write, and visit their legislators! We also take this approach to membership! We need each and every member to spread 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 - Martha Schatz  
President Elect- Maureen Hacker  
Vice President - Gale "Hap" Hairston  
Immediate Past President - Nancy Craig  
Recording Secretary - Sandy Applegate  
Treasurer - Julia Platt  
14 Regional Vice Presidents - See Pg. 10

## Appointed Officers

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

---

## MRTA Elected Officers

<p>President</p>  <p>Martha Schatz Billings, MO</p>	<p>President Elect</p>  <p>Maureen Hacker Mexico, MO</p>	<p>Immediate Past President</p>  <p>Nancy Craig Valley Park, MO</p>
<p>Vice President</p>  <p>Gale "Hap" Hairston Columbia, MO</p>	<p>Recording Secretary</p>  <p>Sandy Applegate St. Louis, MO</p>	<p>Treasurer</p>  <p>Julia Platt Eldon, MO</p>

# 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.



# 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.

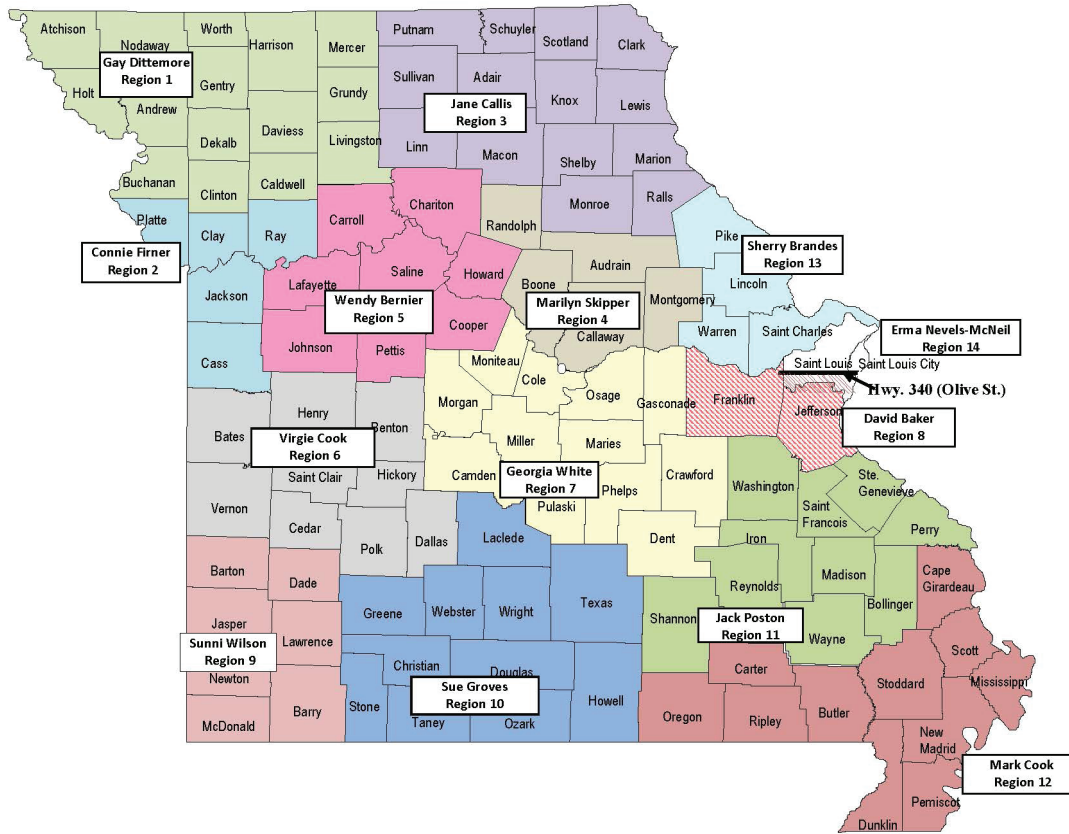






# Interested in Local Unit meetings?

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

<b>Region 1</b> Gay Dittmore Savannah 816-262-3371 gaydittmore40@gmail.com	<b>Region 5</b> Wendy Bernier Warrensburg 660-864-9609 wendybernier50@gmail.com	<b>Region 9</b> Sunni Wilson Mount Vernon 417-413-4987 sunnirae@wilsonia.net	<b>Region 13</b> Sherry Brandes Marthasville 636-359-3444 sherry137@centurytel.net
<b>Region 2</b> Connie Firner Raymore 816-547-4061 conniehealy13@gmail.com	<b>Region 6</b> Virgie Cook Clinton 660-924-3014 vircook@embarqmail.com	<b>Region 10</b> Sue Groves Springfield 417-860-7970 suegroves@msn.com	<b>Region 14</b> Erma Nevels - McNeil Hazelwood 314-731-7098 erma.nevels@att.net
<b>Region 3</b> Jane Callis Paris 573-473-7719 ajcallis01@gmail.com	<b>Region 7</b> Georgia White Richland 573-765-2988 g44white@embarqmail.com	<b>Region 11</b> John "Jack" Poston Bonne Terre 573-747-3601 post81@charter.net	
<b>Region 4</b> Marilyn Skipper Ashland 573-673-8767 marilynskipper45@gmail.com	<b>Region 8</b> Dr. David Baker St. Louis 314-974-5573 dbaker@wfsmidwest.com	<b>Region 12</b> Mark Cook Cape Girardeau 573-576-5216 obrother69@gmail.com	



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

## MRTA Unit Listing

<b>Region 1</b> Andrew Co. Atchison/Holt Caldwell Co. Clinton Co. Daviess Co. D.C. United Co. Grundy/Mercer Co. Harrison Co. Livingston Co. Mackinaw Co. St. Joseph  <b>Region 2</b> Belton Blue Springs Cass Co. Clay Platte Co. Fort Dodge Grandview Hickman Mills Independence John Knox Village Kansas City Lee's Summit Liberty Lawrence, Oak Grove, Grain Valley (LDV) Ray Co. Raytown  <b>Region 3</b> Kirksville Lewis Co. Linn Co. Macon Co. Marion/Halls Monroe/Shelby Scotland Co. Sullivan Co.	<b>Region 4</b> Audrain Co./Mexico Boone Co. Callaway Co. Montgomery Co. Randolph Co.  <b>Region 5</b> Carroll Co. Chariton Co. Cooper Co. Higginsville Howard Co. Johnson Co. Lafayette Co. Osceola Saline Co. Sedalia Community State Fair C. C.  <b>Region 6</b> Benton Co. Dallas Co. Henry Co. Hickory Co. Polk Co. Sac. Dodge St. Clair Co. Stockton Lakers Vernon Co. West Central  <b>Region 7</b> Camden Co. Central MO Cole Co. Crawford Co. Dent Co. Miller Co. Maries/Gasconade Moniteau Morgan Phelps Co. Pulaski Co.	<b>Region 8</b> Affton Bayless Brentwood Clayton Franklin Co. Hancock Place Jefferson Co. Kirkwood Ladue Lindbergh Maplewood-Richmond Heights Mehlville Parkway Rockwood Spec. School Dist./ St. Louis Suburban Valley Park  <b>Region 9</b> Barry Co. Barton Co. Carthage Dade Co. Lawrence Co. McDonald Co. Newton Co. Webb City/Carl Junction  <b>Region 10</b> Christian Co. Douglas Co. Laclede Co. Republic South Central Springfield Texas Co. Tri Lakes Webster Co. Wright Co.	<b>Region 11</b> Bollinger Co. Iron Co. Madison Co. Mineral Area Perry Co. Reynolds Co. Shannon Ste. Genevieve Washington Co. Wayne Co.  <b>Region 12</b> Bootheel Butler Co./Poplar Bluff Cape Girardeau Carter Co. *Oregon Ripley Co. SEMO Stockland Co.  <b>Region 13</b> Daniel Boone Lincoln Pike St. Charles  <b>Region 14</b> Ferguson-Florissant Hazelwood Jennings Normandy Pottsville Ritenour Riverview Gardens St. Louis City University City  *Plans to start a Unit soon.
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# **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/  
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Sarah Hoeller

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**MRTA/MRTA Administrative Assistant**

Morgan Piening

morganpiening@mrta.org



**MRTA Membership Database  
Specialist/Administrative**

Paige Holtmeyer

paigeholtmeyer@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](http://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**

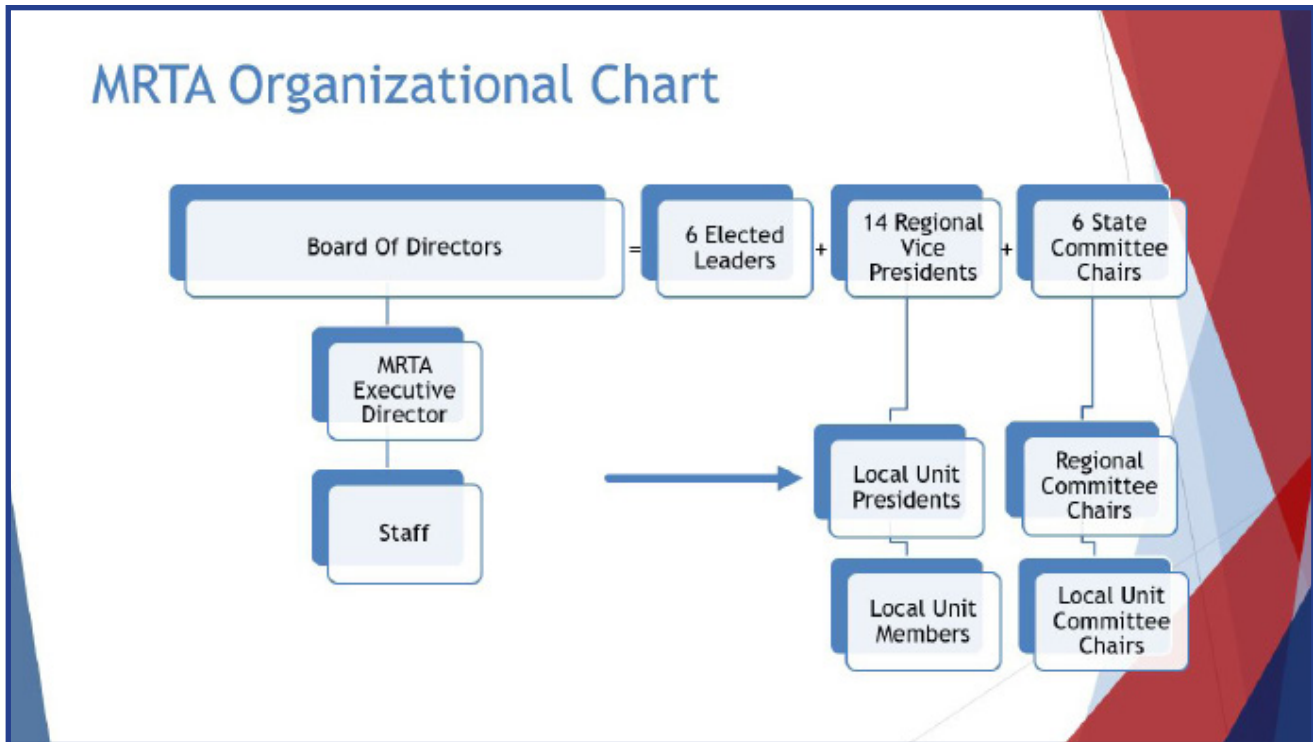
Like us on Facebook! You can easily “like” us by clicking the Facebook logo at the bottom of any of our emails. We post all vital information on Facebook as well as information we think you may find interesting or useful. It’s a great way to keep up with us!

### **MRTA Phone2Action**

We need you to continue to be “Virtual Activists” in 2023. 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.

## STATE OFFICE – LOCAL UNIT RELATIONSHIP



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

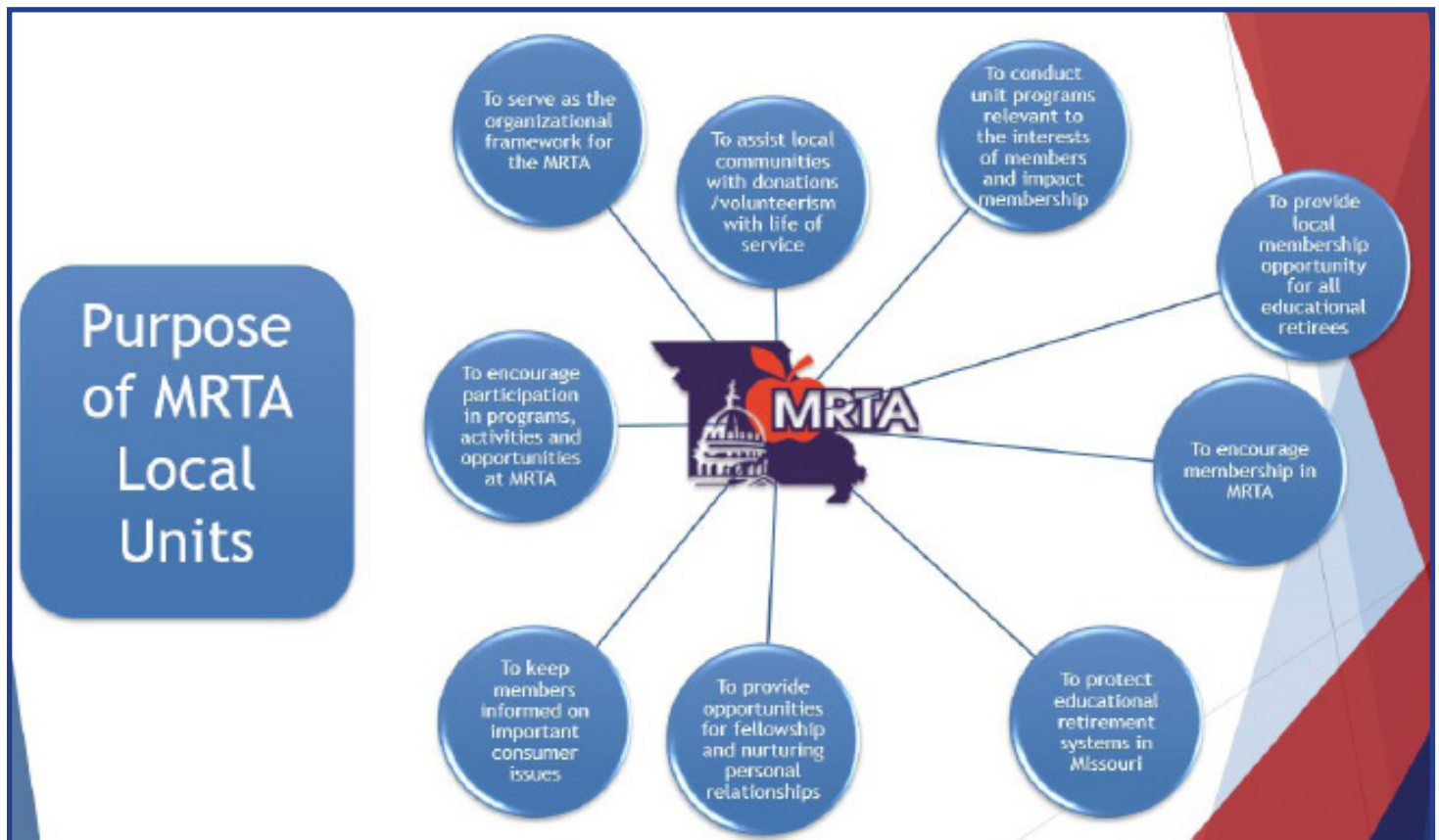
Vice President who is a voting member of the state office Board of Directors. Each Regional Vice President is the main point of contact between the state office and the Local MRTA Units.

**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

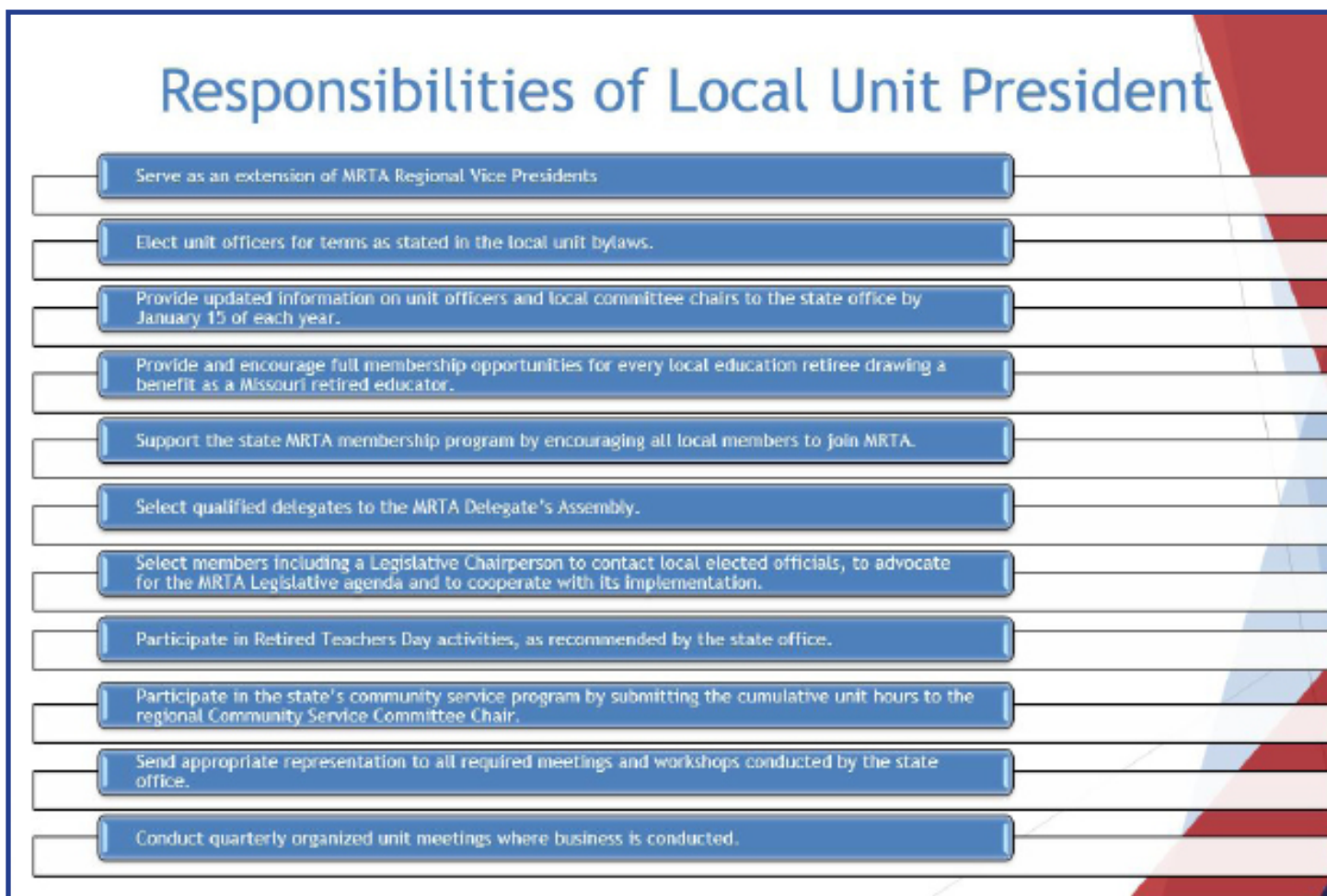
- To serve as the organizational framework for the Missouri Retired Teachers Association and Public School Personnel.
- To provide a local membership opportunity for all education retirees and to encourage membership in MRTA.
- To conduct unit programs relevant to the interests of members and enhance 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.

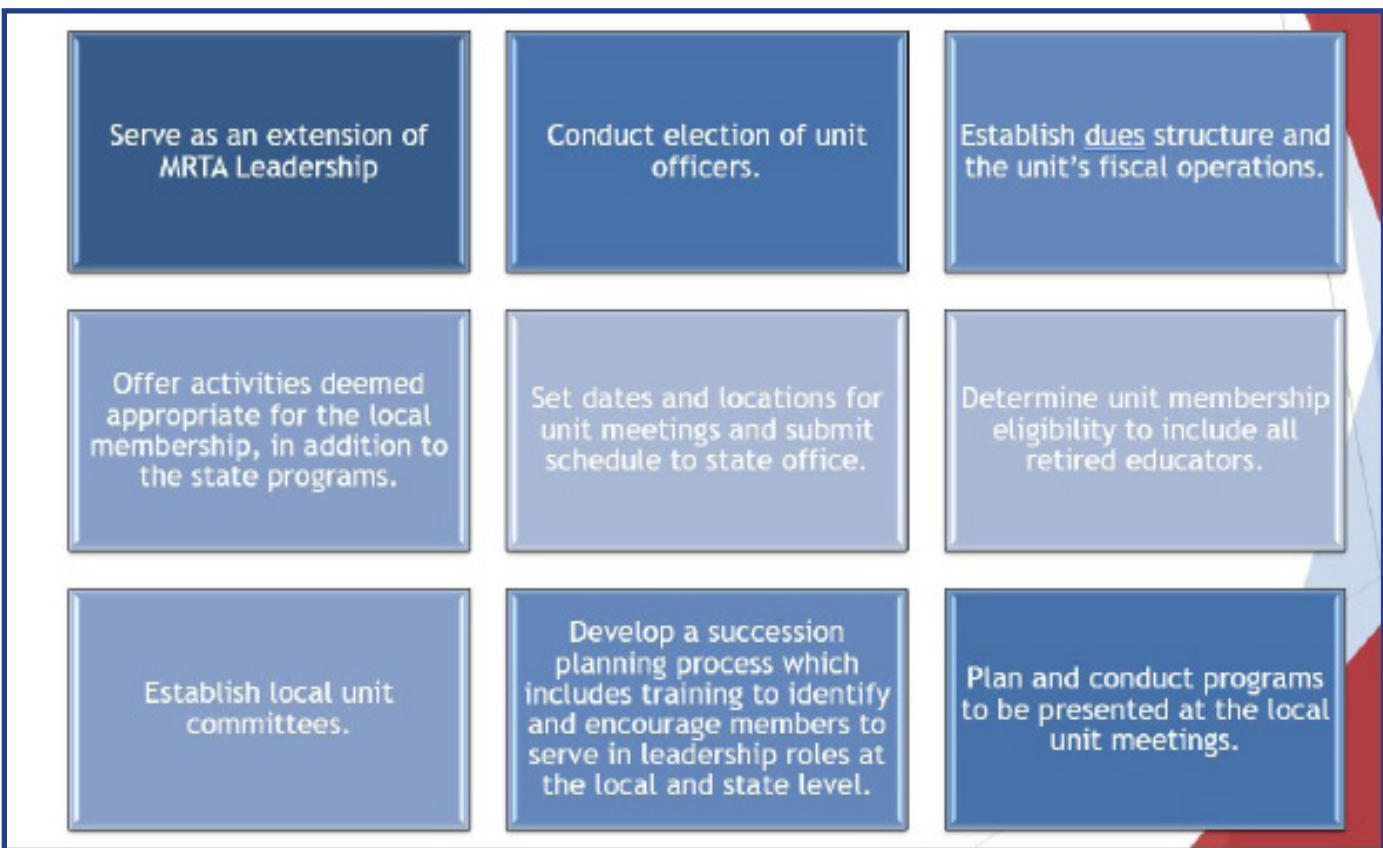




## LOCAL UNIT DUTIES FOR STATE PROGRAMS

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](http://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 1<sup>st</sup> 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](http://www.myAMBAbenefits.info/mrta)



# THOUSANDS OF SAVINGS OPPORTUNITIES!

## YOUR INSIGHT INTO SAVINGS

**T-Mobile**

**WYNDHAM**  
HOTEL GROUP

**CINEMARK**

**REGAL**



**RESTAURANT.COM**  
BEST DEAL. EVERY MEAL.

**SAMSUNG**

**Hertz**

**KOHL'S**

**ANYTIME FITNESS**

**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](http://www.avis.com)  
Budget: 800.527.0700 | [www.budget.com](http://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](http://www.cruiseandvacationbenefits.com)

### ORLANDO EMPLOYEE DISCOUNTS:

Save up to 35% on Your Orlando Vacation!  
866.391.6840 | [www.orlandoemployeediscounts.com](http://www.orlandoemployeediscounts.com)

### NATIONWIDE PET INSURANCE:

Get a 5% discount on new pet insurance policies:  
[www.petinsurance.com](http://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](http://www.myAMBA dining.com)

### ROAD SCHOLAR:

Association Members receive exclusive discounts on educational travel. For details on upcoming trips visit [www.road scholar.org](http://www.road scholar.org)

### COMPUTER DISCOUNTS

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

### TRIP BEAT

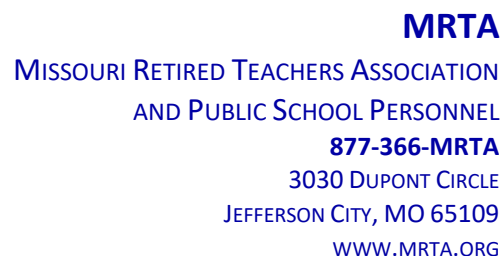
Vacation Rental Worldwide to save up to 40% on weekly vacation stays at only \$399 a week. Call 844.367.6433 and mention Passport to learn more.

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](http://myAMBAbenefits.info).



*MRTA Unit President Handbook*





**CHARGE:** 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.”**

**MISSION:** To grow MRTA membership and work actively with government and its entities so that all public school personnel will be secure economically, socially, and professionally in retirement.

**HOW:** To develop strategies of persuading public school personnel retirees to join and/or renew MRTA membership through personal contact, phone, mail, e-mail, and social media such as Facebook.

**BY:**

1. Encouraging each MRTA Unit to have a Membership Chairperson and a committee who are responsible for state MRTA membership as well as local membership.
2. Acquiring the school directory lists of the names and addresses of the new retirees, both teachers and support staff, each year from every school district in your MRTA Unit/Region and sending the list(s) to the Regional Membership Chair who will send it to the MRTA office. Districts having no retirees should also be reported.
3. Increasing the current MRTA membership renewal rate of 78.12% to 90% of MRTA \$35 memberships:
  - a. **Organizing membership campaigns via Zoom, Facebook, emails, phone calls, and other forms of contact.**
  - b. Promoting the advantage of automatic dues renewal via the MRTA website for payment of MRTA dues.
  - c. Growing MRTA’s and local units’ social media outreach through platforms such as Facebook.
  - d. Offering the convenience of paying a three-year MRTA membership of \$105.
4. Increasing 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 new and exciting benefits and discounts.
5. Increasing MRTA membership in accordance with **MRTA’s 5 Year Strategic Plan** initiating a BHAG of 42,000 MRTA members by 2025. This requires roughly 2,500 new members each year. NOTE: MRTA loses approximately 1,000 members annually due to death.
6. Following the timeframe of the **MRTA Membership Events Calendar** to coordinate membership campaigns statewide.
7. Working with the MRTA Retirement Education Committee to promote **“Keeping Missouri Communities Strong with Experienced School Teachers”**:
  - a. By promoting and protecting strong defined benefit plans such as PSRS/PEERS.
  - b. By attending beginning of the school year educator gatherings such as health fairs, convocations, etc. and to periodically deliver MRTA materials, including MRTF Grant Applications, to the teachers and support staff in every building.
8. Initiating marketing programs toward recruiting Public Education Employees Retirement System (PEERS/Support Staff) retirees as MRTA members such as the distribution of the **MRTA PEERS Membership Brochure**.

# 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.***



## Join Now and Be Counted!

### MRTA has strength in numbers!

- Organized - 1960
- Members - 30,000
- Local Units - 145
- State Regions - 14
- Regional and Local Unit Meetings
- Unit President Summit
- State Annual Meeting
- MRTA Legislative Day at the State Capitol
- MRTA Distinguished Retiree Program
- MRTA Units of Excellence

### MRTA MEMBER BENEFITS

(see [www.mrta.org](http://www.mrta.org) for full listing)

### Announcing MRTA's new benefits provider, AMBA!

- myAMBAdiscounts (Passport) – thousands of savings opportunities nationwide
- Dental Insurance
- Vision Service Plan (VSP)
- Medicare Supplements
- Home Health Care Insurance
- Cancer, Heart & Stroke Insurance
- American Hearing Benefits (AHB)
- Medical Air Services Association (MASA)
- Classroom Liability Coverage for retirees and for active educators – Forrest T. Jones & Co.
- Keeping You Informed – Newsletters, E-News, Email, Calls to Action, and Facebook

**MRTA membership is a small investment to improve and protect your pension and to ensure a strong voice in the State Capitol and in Washington D.C.!**

## MISSION STATEMENT

The mission of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to grow membership and work actively with government and its entities so that all public school personnel will be secure economically, socially, and professionally in retirement.

## VISION STATEMENT

The vision of Missouri Retired Teachers Association and Public School Personnel (MRTA) is to promote and protect pensions, programs, and benefits of all public school personnel in retirement.

**MRTA is the largest retiree association in Missouri at 30,000 and growing.**  
**At MRTA the education retiree is our #1 priority!**

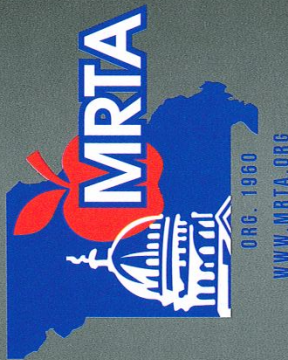


## MRTA

### Missouri Retired Teachers Association and Public School Personnel

3030 DuPont Circle  
 Jefferson City, MO 65109  
 Toll-Free 1-877-366-6782  
 Fax 573-634-4273  
[www.mrta.org](http://www.mrta.org)  
[mrta@mrta.org](mailto:mrta@mrta.org)

Missouri Retired Teachers Association  
and Public School Personnel



**Protect your pension  
benefits by joining  
MRTA!**



**MRTA Membership Application**



## WHO WE ARE...

Missouri Retired Teachers Association  
and Public School Personnel

MRTA is a 501(c)(4) not-for-profit corporation with a statewide mission to serve ALL education retirees whether MRTA members or not.

MRTA was organized in 1960 and is an association of certified and noncertified education retirees numbering over 30,000 members. MRTA has been and remains a major player in establishing Missouri's educational pension system as one of the nation's best.

MRTA is comprised of all classes of education employees from superintendents to principals, to support staff, to MNEA, MSTA, AFT of Missouri; as well as all other education employees. This provides MRTA with statewide influence with either political party.



**MRTA is your pension watchdog!**

## WHAT WE DO...

MRTA's number one priority is promoting and preserving your education pension program and benefits.

MRTA protects and advocates for educator pension benefits.

MRTA actively works with government for beneficial legislation and educates legislators on retiree issues.

MRTA educates public education employees - Active and Retired - on their pension system and pension benefits.

MRTA provides a wide range of member benefits - everything from classroom liability insurance to travel discounts.

A prime example of MRTA working for you is the Public Pension Exemption! Thanks to MRTA all retired public school educators are exempt from Missouri State income taxes up to \$39,014 - HB 444 (2007). This includes St. Louis and Kansas City retirees.

## WHAT WE DO NOT DO...

MRTA is nonpartisan and does not endorse candidates.

MRTA is not affiliated with any other education association. We are independent.

MRTA is not in competition with any other association. We are open to all.

**See [www.mrta.org](http://www.mrta.org) for more!**

## Missouri Retired Teachers Association and Public School Personnel Membership Form

- ☐ Annual MRTA Membership.....\$44/1 Year OR \$117/3 Years  
or join via auto renewal at [mrta.org](http://mrta.org) for \$39/year
- ☐ New Membership  
☐ Renewal of Membership
- ☐ Retired Teachers/Administrators  
☐ Retired Support Staff
- ☐ Associate Membership.....\$25  
(Anyone who is not currently drawing a public school retirement benefit.)
- ☐ I AM INTERESTED IN AUTOMATIC ANNUAL MEMBERSHIP DUES RENEWAL  
Save \$5/Year  
(Association dues are not tax deductible)

Name \_\_\_\_\_ Birth Date \_\_\_\_\_

Street, City, State, Zip \_\_\_\_\_

Email Address \_\_\_\_\_ Phone ( \_\_\_\_\_ ) \_\_\_\_\_

School District Retired From \_\_\_\_\_ Local MRTA Unit (if known) \_\_\_\_\_

Pay by Credit/Debit Card: ☐ Visa ☐ MasterCard ☐ Discover

You may join MRTA  
securely online at  
[www.mrta.org](http://www.mrta.org)

or call the office at  
1-877-366-6782

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_ Name on Card \_\_\_\_\_

Make check payable to: MRTA  
3030 DuPont Circle  
Jefferson City, MO 65109

# 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.

## 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/](http://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.

#### MRTA Legislative E-mails



# 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 2023 the date is February 14th.***

**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.*



## 2022 MRTA Legislative Platform

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

### **RETIREMENT SYSTEM LEGISLATION AND POLICY**

1. MRTA will use all available means to restore the Cost-of-Living Adjustment (COLA) which the PSRS/PEERS Board of Trustees has reduced twice in the past eleven years. MRTA supports the restoration of the COLA to pre-2011 levels for PSRS/PEERS of MO retirees.
2. MRTA will promote legislation for a PSRS/PEERS COLA matching Social Security, where the cumulative CPI-U on the last day of the fiscal year is the COLA.
3. In order to preserve and protect the strong financial integrity and transparency of PSRS/PEERS of Missouri, MRTA will advocate for a comprehensive audit of PSRS/PEERS from the State Auditor's Office.

### **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 opposes any benefit reductions for PSRS/PEERS public school employees, including a tier-two defined benefit plan.
3. 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.
4. MRTA will work to protect/maintain access to healthcare coverage for public school retirees through the school system from which they retired as is mandated by Missouri law requiring the same premium cost and the same coverage as the active public school employees.
5. MRTA will support “equal and adequate” public school funding through increased state funding of the Foundation Formula for all public schools as mandated by the Missouri Constitution.
6. MRTA will oppose any legislation that would reduce state tax revenue for public school funding.

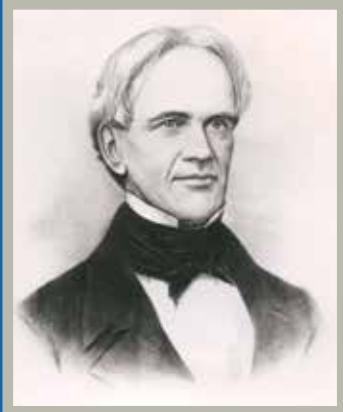
MRTA, a 501(c)(4) not-for-profit corporation, is a grassroots advocacy association with over 30,000 members. MRTA is independent, nonpartisan, and does not endorse political candidates.

7. MRTA will oppose vouchers, education tax credits, education scholarships, or any other use of tax dollars for nonpublic schools.
8. MRTA will oppose the statewide expansion of charter schools.
9. MRTA will support requiring the use of certified teachers in virtual classrooms and charter schools to be members or retirees of PSRS.
10. MRTA supports accountability for existing charter schools equal to that of public schools.
11. MRTA will support legislation to increase minimum salaries for teachers and the funding of those increases.
12. MRTA will oppose state mandated consolidation of public schools that meet state standards.
13. MRTA will work to protect/maintain the Missouri state income tax exemptions for public education retirees that MRTA was instrumental in obtaining in 2007 (HB444).

#### **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.
4. MRTA will oppose vouchers, education tax credits, education scholarships, or any other use of tax dollars for nonpublic schools.
5. MRTA will oppose the expansion of charter schools.
6. MRTA supports accountability for charter schools and virtual education equal to that of public schools.
7. MRTA supports accessible, cost effective healthcare to promote financial security for all.
8. MRTA supports accessible, cost effective prescription drugs to promote financial security for all.
9. MRTA supports efforts that would decrease student loan debt to encourage the recruitment and retention of teachers.





“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](http://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.

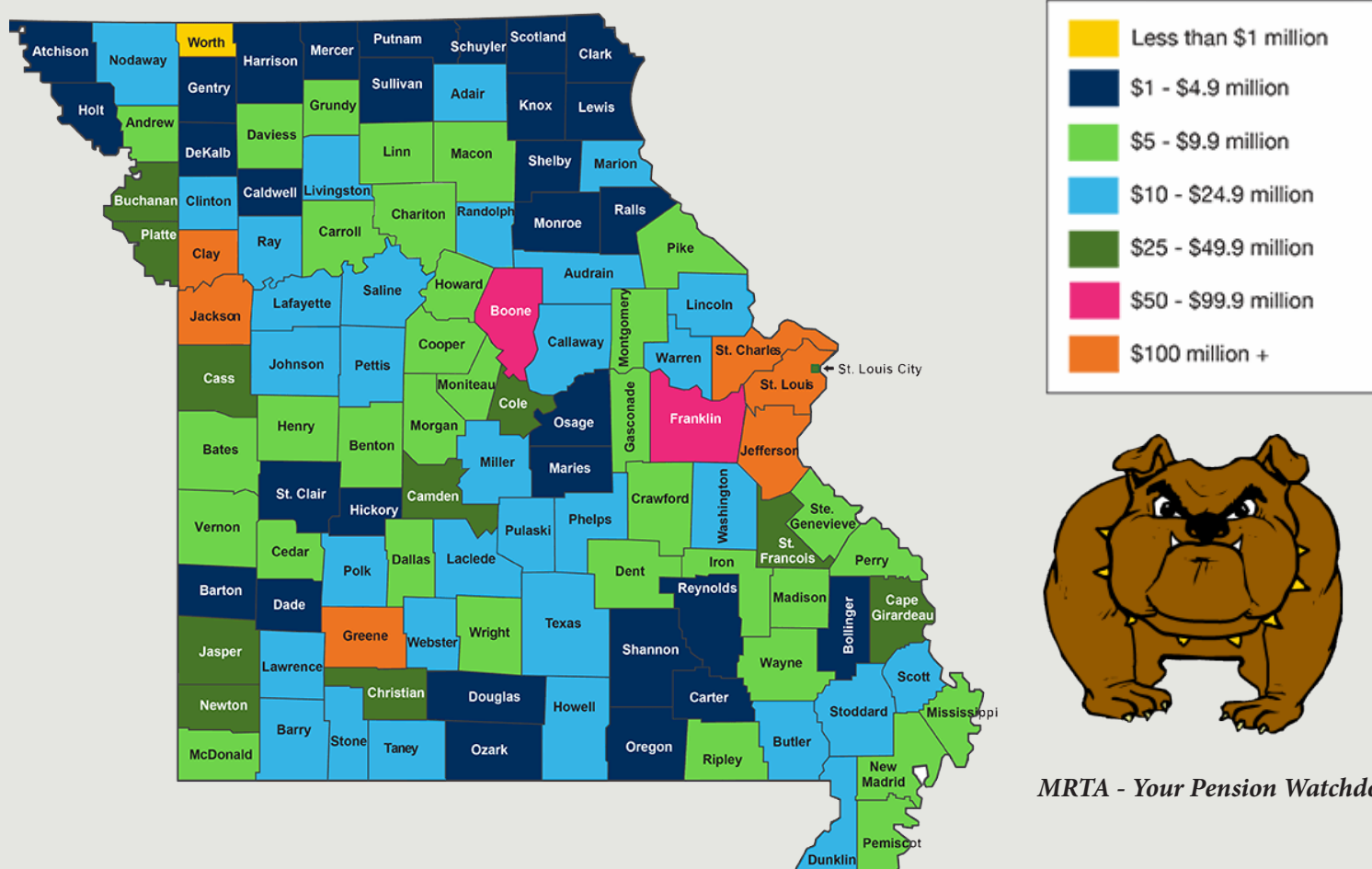
The past 73 years have laid a strong foundation for the future of education retirees in Missouri. MRTA recognizes how the Public School Retirement System (PSRS) has contributed to creating strong communities in Missouri by providing a strong retirement program for Missouri teachers. Let's keep it that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



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](http://www.mrta.org)**  
 Missouri Retired Teachers Association and Public School Personnel  
 3030 DuPont Circle, Jefferson City, MO - 1-877-366-6782

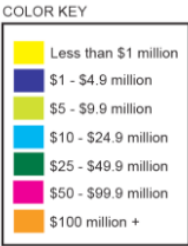
The MRTA Retirement Education Committee is charged with educating and informing both members and prospective members of the value of their pension benefits in retirement and how MRTA is essential to enhancing and protecting those educator pension benefits.

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](http://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](http://www.mrta.org) like PSRS/PEERS Benefits by County below.*

(as of December 31, 2016)

Of the nearly 90,000 individuals receiving benefits from PSRS/PEERS, approximately 90% of them live in Missouri. As of December 31, 2016, total annual benefit payments were more than \$2.6 billion. Of this amount, more than \$2.3 billion was distributed among Missouri's 114 counties, positively impacting the state's economy.







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AND PUBLIC SCHOOL PERSONNEL  
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3030 DUPONT CIRCLE  
JEFFERSON CITY, MO 65109  
WWW.MRTA.ORG

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## MRTA Retirement Education Committee Goals and Duties – 2022

**CHARGE:** To educate/inform public school educators, future educators, and communities of the value of educator pension benefits in retirement and how good pension benefits keep experienced professional teachers in the classroom. MRTA is essential to enhancing and protecting those educator pension benefits which benefits all Missouri children and communities.

**AGENDA:** **STRENGTH IN NUMBERS!** Our goal is to increase membership in MRTA. This is the best way to protect educator pensions.

**HOW:** By promoting and educating active and retired educators/support staff and the public on the importance of MRTA, Missouri's Public Schools, and Public School Retirement Systems in keeping Missouri's communities strong.

**BY:**

- 1) Encouraging every MRTA Unit to have a Retirement Education Chairperson and increasing communication between Regional and Local Unit Chairpersons.
- 2) Personally contacting superintendents and building principals to promote ***"Keeping Missouri Communities Strong with Experienced Teachers and Support Staff."***
- 3) Working with the MRTA Membership Committee by attending beginning of the school year educator gatherings such as health fairs, convocations, etc. and to periodically deliver MRTA materials, including MRTF Grant Applications and MRTA Cash for Classrooms information, to the teacher workrooms in every building.
- 4) Attending statewide education association conferences to promote MRTA.
- 5) Promoting MRTA member benefits and discounts (AMBA) that will benefit retirees economically, professionally, and socially in retirement.
- 6) Organizing a local MRTA Retirement Education Workshop in each of MRTA's 14 Regions.

MRTA, a 501(c)(4) not-for-profit corporation, is a grassroots advocacy association with nearly 30,000 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!**





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Missouri Retired Teachers Association  
and Public School Personnel  
**877-366-MRTA**  
3030 DuPont Circle  
Jefferson City, MO 65109  
[www.mrta.org](http://www.mrta.org)

November 10, 2020

## **MRTA Community Service Committee Goals and Duties - 2021**

**CHARGE:** To encourage MRTA members to continue their public service by providing and encouraging opportunities to serve their local communities as retired educators. ***TO SERVE, NOT TO BE SERVED*** is our motto.

**AGENDA:** To increase MRTA membership through fellowship and community involvement.

**HOW:** To promote the name of MRTA to active and retired educators through community service activities.

**By:**

- 1) Encouraging all local units to have a community service chairperson
- 2) Encouraging participation in the MRTA community service projects
  - A) Show Me Hunger – collecting and donating food, other household necessities, and money to help with local needs
  - B) Collecting can tabs for the Ronald McDonald House
  - C) Collecting certain food labels for the local school
- 3) Promoting and reporting all local unit MRTA community service projects through newspapers, Social Media, Facebook, and the MRTA Website
- 4) Encouraging all local MRTA Units to 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) Dollars donated for hunger relief
- 5) Providing easy access for MRTA Unit Community Service Chairpersons to informational reports and activities via the MRTA website, social media and Facebook.

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

## 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			
<b>Total</b>			

\_\_\_\_\_  
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](http://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 experience performing specialized extortion 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, transcribed, stored in a retrieval system, or translated into a language or computer language, in any form by any means, electronic, mechanical, optical, chemical, manual or otherwise, without the express written consent of Kroll Advisory Solutions. These materials are provided for informational purposes only.

MEM-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

September 29, 2021

### **MRTA Informative & Protective Services Committee Goals and Duties 2022**

- CHARGE:** To encourage MRTA Unit Informative & Protective Services (IPS) committee leaders to provide education retirees with valuable information and to promote MRTA through media such as local newspapers and Facebook. This charge will help all school personnel live healthy, vital lives and be secure economically, socially, and professionally in retirement.
- AGENDA:** To increase membership through promotion of MRTA and its activities via media (i.e. local newspapers and Facebook, etc.) and to provide information important to MRTA members.
- FOCUS:** To use media to provide members and the public with information regarding MRTA retirement issues and activities.
- HOW:** By promoting MRTA to active and retired school personnel through the MRTA Informative & Protective Services Committee via all MRTA gatherings, local newspapers, and Facebook.
- By:**
- 1) Encouraging all local units to have an IPS Committee chairperson who will disseminate information to local unit members.
  - 2) Disbursing information through newspapers, Facebook, and other sources of communication.
  - 3) Monitoring the MRTA website, IPS page, and social media, such as Facebook, for new activities and reports that may be shared at local unit meetings.
  - 4) Participating in October's National Cyber Security Month as a statewide IPS project.

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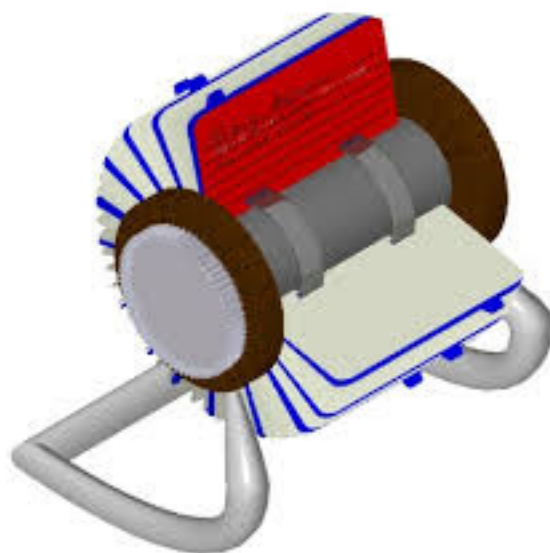
# Forms

# 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](http://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 **January 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](mailto:mrta@mrta.org)**

**DATE:** \_\_\_\_\_

**NAME OF LOCAL UNIT:** \_\_\_\_\_

**For Office Use  
MRTA STATE  
MEMBER ID#**

**DOES YOUR UNIT HAVE A FACEBOOK PAGE OR WEBSITE:** \_\_\_\_ FACEBOOK \_\_\_\_ WEBSITE \_\_\_\_ NEITHER

### **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: \_\_\_\_\_

CITY, STATE ZIP: \_\_\_\_\_ PHONE: \_\_\_\_\_

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:** \_\_\_\_\_

**EXACT ADDRESS OF MEETING PLACE:** \_\_\_\_\_

**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:** \_\_\_\_\_

\* Please call the State MRTA Office for a list of MRTA members in your area to compare to your list of Unit Members in order to find the number of MRTA members in your Unit (1-877-366-6782).

# 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.



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JEFFERSON CITY, MO 65109  
WWW.MRTA.ORG

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## 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.







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AND PUBLIC SCHOOL PERSONNEL  
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JEFFERSON CITY, MO 65109  
1-877-366-6782  
WWW.MRTA.ORG

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

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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. 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 to contact your Regional Vice President for assistance and to answer any questions you may have.

**Unit of Excellence questionnaires must be post-marked to the MRTA State Office no later than January 31 for the year just completed.** The reporting period shall be on a calendar year basis. Units receiving the Unit of Excellence Award will be recognized at the MRTA Fall Annual Meeting and in the MRTA Newsletter, and the MRTA Website.

This application was submitted by: \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Unit name)

\_\_\_\_\_  
*Signature of Regional  
Vice President*

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

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

\_\_\_\_\_  
(Phone #)

Does your unit want to receive (please check one): ☐ Trophy OR ☐ Certificate  
*MRTA Unit President Handbook*



# Unit of Excellence Award Application

\_\_\_\_\_  
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

<b><u>MRTA UNIT MEMBERSHIP CRITERIA</u></b>	<b>YES</b>	<b>NO</b>
***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.		
2. Did the unit host recruitment activities for new retirees such as formally inviting, recognizing, and welcoming new members at unit meetings?		
3. Did the unit sponsor at least one annual active or retired teacher appreciation activity?		
4. Has the unit sent at least one form of communication to prospective members?		
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.		
6. Was an organized local membership drive conducted that included a membership goal for the year?		
7. Did the unit membership show an increase over the previous year as of December 31?		
8. Did the unit membership committee utilize the membership computer printout which was provided by the MRTA State Office?		
<b><u>MRTA UNIT MEETING CRITERIA</u></b>	<b>YES</b>	<b>NO</b>
1. Did the unit have at least 8 gatherings, field trips, executive board or regional meetings, etc. last year?		
2. Does the unit have Committee Chairpersons for the Legislative, Membership, Community Service, Information & Protective Services, and Retirement Education committees?		
3. Did unit directories, either electronic or hard copy, contain meeting dates, time, program, and the MRTA Mission and Vision statements? <b>Was it distributed to unit members, Regional Vice Presidents, and the MRTA State Office?</b>		
4. Do your unit meeting minutes reflect that your committee chairs prepared and presented a report for each meeting?		
5. Were members contacted prior to each meeting?		
6. Were pertinent communications from the MRTA State Office presented to membership and/or acted upon at each meeting?		

REVISED FEBRUARY 2017

INSERT NAME & REGION OF LOCAL UNIT MAKING APPLICATION

<b><u>MRTA UNIT ADMINISTRATIVE CRITERIA</u></b>	<b>YES</b>	<b>NO</b>
1. Did the unit have email address distribution lists to contact local membership?		
2. Does the MRTA State Office have a current copy of the unit Bylaws on file?		
3. Are the unit officers and committee chairs all current paid members of MRTA?		
4. Did the unit submit an updated <i>Local Unit Officers Report</i> to the MRTA State Office by January 15?		
<b><u>PROGRAM CRITERIA</u></b>	<b>YES</b>	<b>NO</b>
1. Did the unit president attend the MRTA Unit President Summit?		
2. Did unit members attend the State MRTA Annual Meeting?		
3. Did unit members attend the State Delegate's Assembly?		
4. Did unit members attend the annual regional meeting?		
5. Did unit members attend the MRTA Legislative Day event or visit their respective elected officials at the State Capitol?		
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?		
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?		
8. Did the MRTA President, or the Executive Director, or your Regional Vice President attend a unit meeting?		
9. Did the unit participate in the MRTA Distinguished Retiree of the Year Program?		
10. Did the unit publish a local newsletter, send out e-news, or develop a website, Facebook page or group?		
<b>TOTAL NUMBER OF "Yes/No" ANSWERS</b> <b>ALL QUESTIONS MUST BE ANSWERED</b>		

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

REVISED FEBRUARY 2017



# **MRTA CASH FOR CLASSROOMS**





Missouri Retired Teachers Association and Public School Personnel  
3030 DuPont Circle, Jefferson City, MO 65109  
www.mrta.org – 1-877-366-6782

## MRTA Cash for Classrooms Program

**PURPOSE:** MRTA Cash for Classrooms helps provide financial means for educators to create experiences that enrich and enhance student learning.

**BUDGET:** MRTA will provide \$15,000 in matching funds each year, and eligible MRTA Units will be allowed to apply for up to \$100 in matching funds to go to a DonorsChoose program of their choice.

**ELIGIBILITY:** To be eligible, MRTA Units must have a current MRTA Unit Officer Report on file at the MRTA office and be in good standing with MRTA. Units must also raise funds within their area to participate and are required to raise a minimum of \$100 per DonorsChoose project they wish to fund. MRTA will match dollar for dollar all raised funds up to \$100.

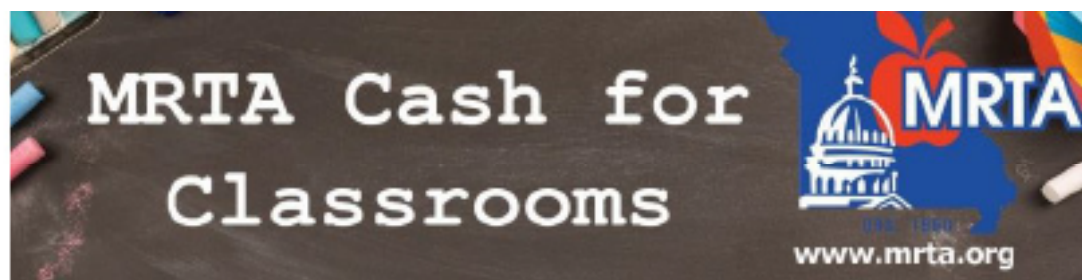
**REQUIREMENTS:** MRTA Units must agree to promote MRTA Cash for Classrooms in the following manners:

- Requesting access to speak to the school faculty at which the project was funded
- Placing MRTA materials and MRTA Cash for Classrooms materials in the faculty work room(s)
- Creating a Press Release for the local newspaper and any other forms of local news
- Requesting the School District make a Facebook post about the funded program
- Posting photos and information about the program funded on the Unit's Facebook page

**OTHER:** If there are any dollars left from the initial round of MRTA Cash for Classrooms disbursement, MRTA Units of Excellence may apply for an additional \$100 dollar match on a first-come, first-serve basis.

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 CASH FOR CLASSROOMS APPLICATION

<b>MRTA Unit Information</b>	
<b>Unit Name:</b>	
<b>Contact Person:</b>	
<b>Mailing Address:</b>	
<b>Phone Number:</b>	
<b>E-mail Address:</b>	
<b>Current Unit Officer Report on File:</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>DonorsChoose Project Information</b>	
<b>School Name:</b>	
<b>Teacher's Name:</b>	
<b>Project Name:</b>	
<b>URL Link to Project Online:</b>	
<b>Unit Donation Amount:</b> <i>(a minimum of \$100 is required)</i>	
<b>Who Will Submit the Full Donation Online to DonorsChoose?</b> <i>(select only one option)</i>	<input type="checkbox"/> MRTA <input type="checkbox"/> Unit

**Units may e-mail their applications to [mrta@mrta.org](mailto:mrta@mrta.org) or mail to MRTA c/o Cash for Classrooms at 3030 DuPont Circle, Jefferson City, MO 65109.**

**PURPOSE:** MRTA Cash for Classrooms helps provide financial means for educators to create experiences that enrich and enhance student learning.

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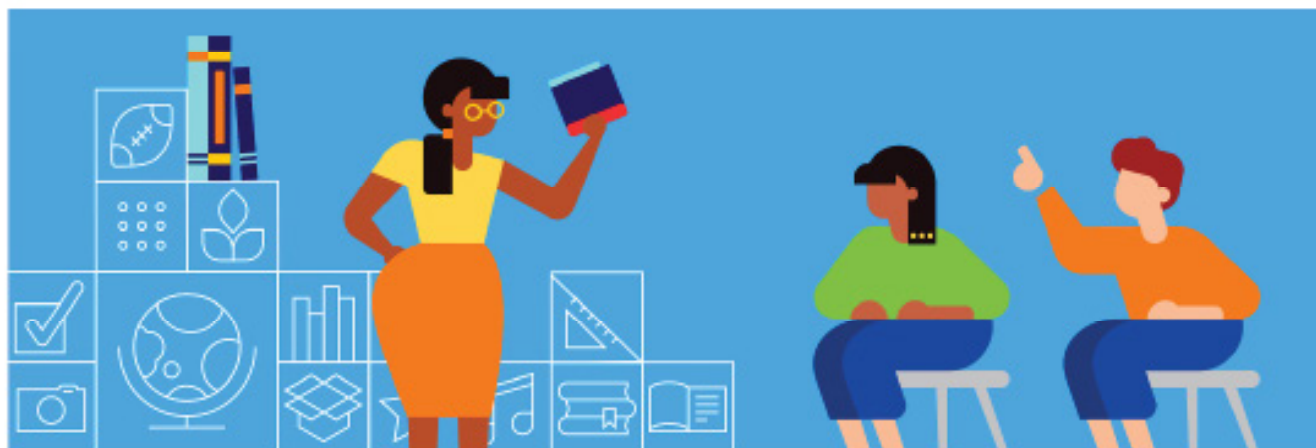
**OTHER:** If there are any dollars left from the initial round of MRTA Cash for Classrooms disbursement, MRTA Units of Excellence may apply for an additional \$100 dollar match on a first-come, first-serve basis.

**WHEN IS THE DEADLINE?** Applications will be accepted January 1st – December 31st each calendar year.

**HOW WILL FUNDS BE DISBURSED?** MRTA Units have the following options to donate funds to DonorsChoose: **(PLEASE SELECT ONE OPTION)**

- Units may submit their donation amount to MRTA with a check or call in to pay with a credit card, and MRTA will go online to submit the Unit's donation and MRTA's matching amount to DonorsChoose in one transaction.
- MRTA will mail a check for the matching amount to the Unit, and the Unit will go online to submit their donation and MRTA's matching amount to DonorsChoose in one transaction.

It is pertinent that the Unit's and MRTA's donation amounts are submitted online in one transaction, so both parties can be acknowledged for fully funding a project on DonorsChoose. Please note that DonorsChoose accepts payment via credit card, PayPal, or check. If you choose to pay with a check, DonorsChoose will provide you with instructions after declaring your donation online at <https://www.donorschoose.org/donors/search.html>. Units may call the MRTA office at (877) 366-6782 with any questions.



## Your Classroom. Your Students. The resources you need.

*At DonorsChoose, we believe teachers know what's best for their students. Our site, used by educators at over 82% of US public schools, empowers you to bring the materials and resources you need into your classroom. Join the community of fellow teachers going above and beyond for their students at [donorschoose.org/teachers](https://donorschoose.org/teachers).*

### What is DonorsChoose?

DonorsChoose is a nonprofit website that engages the public in public schools. Teachers from every corner of America create classroom project requests that are funded by generous citizen donors as well as corporations and foundations that want to support our nation's students and teachers.

### Do teachers like me use it?

Yes! Teachers in every state, subject area, and grade level use our site. They work in communities of every size and with every level of economic need. If you are an educator at a public or public charter school, are employed full-time by the school or district, and work directly with students at least 75% of the time, you are eligible to post projects.

**70%**

Of teachers get funded

**+507,603**

Teachers with projects funded

**+1,425,044**

Projects funded

**+\$832M**

Raised

**+33M**

Students supported

**+81,000**

Schools participating

**DONORS  
CHOOSE**



### What can I ask for?

From pencils to 3-D printers, you can request anything you need to enrich your students' experience at school. Sports equipment? A classroom library? Furniture? Musical instruments? Class trips? We can help with those too. If you can imagine it, you can post a classroom project request for it.

### How long does it take?

The average project takes about 25 minutes to create and submit. Once your project is funded, we purchase all the resources for you and ship them directly to your school, providing you and your school or district with complete transparency and accountability throughout the process.

### What kind of support will I get?

You're never alone! We raise more than half of the funds available on our site, and we're always here to answer your questions through our help center. Let's work together to get what you need for your students.



#### 1. Create Your Project

Request musical instruments, books, field trips—**anything you're dreaming of for your students.**



#### 2. Get Funded

Your friends and family lend a hand; our community of supporters takes care of the rest. **Join the 350,000 teachers who've funded projects through our site**



#### 3. Receive the Goods

We order everything for you and ship it straight to your school. **Hello, packages!**

Share your classroom dreams with a community eager to make them a reality.  
[donorschoose.org/teachers](https://donorschoose.org/teachers)

**DONORS  
CHOOSE**



# **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 [mrta@morta.org](mailto:mrta@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): \_\_\_\_\_

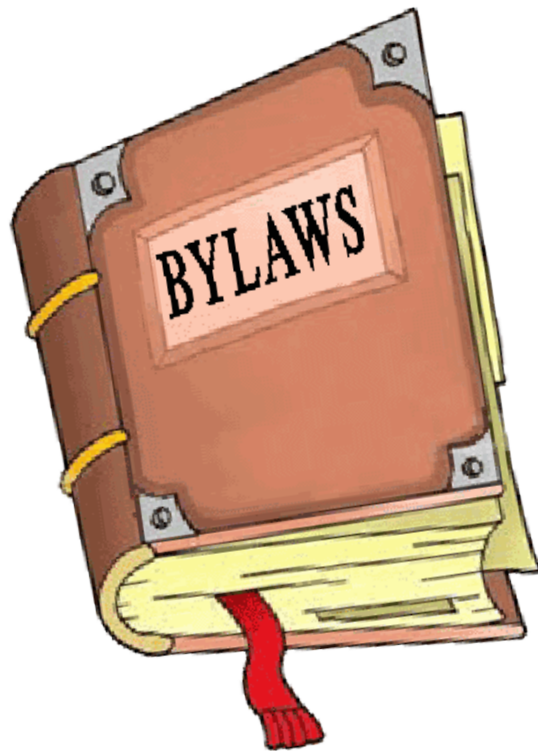
Signature of Local Unit Officer: \_\_\_\_\_

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, 2<sup>nd</sup> 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. Velocity 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.

# MRTF Fundraising via AmazonSmile

Do you shop on Amazon? If you do, it is easy to support MRTF with each purchase. A few minutes to set up is all it takes.

If you type in the word 'smile.' into your browser before Amazon.com, you will be brought to the same Amazon site, but on the fundraising side.

**<http://smile.amazon.com/>**



You can see the sites look almost the same... except for the 'smile'.

The first time you go to the 'Smile' side, you will be asked to choose the organization that you want to support. Search for 'Missouri Retired Teachers Foundation'

Then just use Amazon like you always have. Everything is exactly the same. (Change your bookmark so that you go to the Smile site. We only get credit if you order from the Smile side. It must say 'smile.amazon.com' every time.)

Do you have family and friends that wouldn't mind taking a minute and choosing MRTF? It cost the purchaser nothing but benefits MRTF.

## What is AmazonSmile?

AmazonSmile is a simple and automatic way for you to support your favorite charitable organization every time you shop, at no cost to you. When you shop at smile.amazon.com, you'll find the exact same low prices, vast selection and convenient shopping experience as Amazon.com, with the added bonus that Amazon will donate a portion of the purchase price to your favorite charitable organization. You can choose from nearly one million organizations to support.

## How do I shop at AmazonSmile?

To shop at AmazonSmile simply go to smile.amazon.com from the web browser on your computer or mobile device. You may also want to add a bookmark to smile.amazon.com to make it even easier to return and start your shopping at AmazonSmile.

## Can I use my existing Amazon.com account on AmazonSmile?

Yes, you use the same account on Amazon.com and AmazonSmile. Your shopping cart, Wish List, wedding or baby registry, and other account settings are also the same.

## How do I select a charitable organization to support when shopping on AmazonSmile?

On your first visit to AmazonSmile (smile.amazon.com), you need to select a charitable organization to receive donations from eligible purchases before you begin shopping. We will remember your selection, and then every eligible purchase you make at smile.amazon.com will result in a donation.

## How much of my purchase does Amazon donate?

The AmazonSmile Foundation will donate 0.5% of the purchase price from your eligible AmazonSmile purchases.





Region #: \_\_\_\_\_

**MRTF**

Missouri Retired Teachers Foundation

877-366-6782

3030 DuPont Circle

Jefferson City, MO 65109

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

**MISSOURI RETIRED TEACHERS FOUNDATION (MRTF)  
THE MRTF CLASSROOM GRANT PROGRAM  
2022 APPLICATION – COVER SHEET**

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

**Funds:** Funds may be appropriated in the areas of resources, leadership, research, or materials used by an active Missouri classroom teacher. A minimum of 126 - \$500 grants will be awarded.

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

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

Applicant's Signature

Date

Superintendent's Signature

Date

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

**MRTF is a 501(c)(3) not-for-profit charitable corporation.**



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**MISSOURI RETIRED TEACHERS FOUNDATION (MRTF)  
THE MRTF CLASSROOM GRANT PROGRAM  
2022 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
- Price 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 30<sup>th</sup> (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 31<sup>st</sup>. 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://mrtf.com/grants/apply-for-grant/>. Please make sure to select the correct grant application as MRTF has two (2) different grant programs – one for classroom grants and one for support staff/PEERS members.

*By giving, you leave a legacy; you create a memory that will not fade.*  
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### PEERS/SUPPORT STAFF:

Secretaries, Bus Drivers,  
Cooks, Custodians,  
Nurses, etc.

Region #: \_\_\_\_\_

**MRTF**

Missouri Retired Teachers Foundation

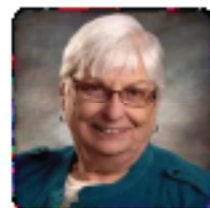
877-366-6782

3030 DuPont Circle

Jefferson City, MO 65109

www.mrtf.org

## **MISSOURI RETIRED TEACHERS FOUNDATION (MRTF) THE MAGGIE ELDER MEMORIAL PEERS/SUPPORT STAFF GRANT PROGRAM 2022 APPLICATION – COVER SHEET**



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

**Funds:** Funds may be appropriated in the areas of resources, leadership, research, or materials used by any Missouri support staff (*secretaries, bus drivers, cooks, custodians, nurses, etc.*) employed by a public school district and are in the PEERS retirement system. A minimum of 20 - \$500 grants will be awarded.

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

<b>APPLICANT'S INFORMATION</b>	
Applicant's Full Name:	
Applicant's Home Address:	
Applicant's Phone Number:	
Applicant's Personal Email:	
Position Held/Job Title:	
<b>SCHOOL DISTRICT'S INFORMATION</b>	
School District:	
School's Name:	
School's Address:	
School's County:	
School's Phone Number:	
Superintendent's Name:	

Applicant's Signature

Date

Superintendent's Signature

Date

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### **PEERS/SUPPORT STAFF:**

**Secretaries, Bus Drivers,  
Cooks, Custodians,  
Nurses, etc.**

### **MRTF**

**Missouri Retired Teachers Foundation  
877-366-6782  
3030 DuPont Circle  
Jefferson City, MO 65109  
[www.mortf.org](http://www.mortf.org)**

## **MISSOURI RETIRED TEACHERS FOUNDATION (MRTF) THE MAGGIE ELDER MEMORIAL PEERS/SUPPORT STAFF GRANT PROGRAM 2022 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
- Price of materials, supplies, and/or equipment needed
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# 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!