

**CHAPTER 4  
HISTORY**

Section 1. Initial Incorporators

KENTUCKY PUBLIC RETIREES (formerly Kentucky Association of Public Annuitants) was founded on June 15, 1983, after more than a year of discussions and planning. The organization’s Articles of Incorporation were filed with the Kentucky Secretary of State on August 16, 1983. The initial incorporators/Board of Directors were:

- |                       |                        |
|-----------------------|------------------------|
| 1. Harold Wallace     | 7. Frances Travis      |
| 2. Arnold L. Mitchell | 8. Taylor L. Davidson  |
| 3. Charles F. Hinds   | 9. Garnett Johnson     |
| 4. James Childers     | 10. Mitchell W. Tinder |
| 5. Ed W. Hancock      | 11. J. Edgar DeShazer  |
| 6. Iris Barrett       | 12. Guyles E. Sutton   |

Section 2. Presidents and Year(s) of Service

- 1983-1984. . . Charles F. Hinds
- 1984-1985. . . Frances Travis
- 1985-1987. . . Joe Bruna
- 1987-1988. . . Taylor Davidson
- 1988-1990. . . Kelly Hubbard
- 1990-1991. . . George W. Simmons, Jr.
- 1991-1993. . . James L. Peel
- 1993-1994. . . Charles R. Brackett
- 1994-1996. . . Bob Henson
- 1996-1998. . . Charles R. Brackett
- 1998-2000. . . Louise Greeman
- 2000-2002. . . Duane Ellis
- 2002-2004. . . C. Leslie Dawson
- 2004-2006. . . Milton Mains
- 2006-2008. . . Joe Conway
- 2008-2010. . . Shirley Clark
- 2010-2012. . . Tom Moore
- 2012-2014. . . Paul R. Guffey
- 2014-2016. . . Paul R. Guffey
- 2016-2018. . . Larry P. Totten
- 2018-2020. . . Larry P. Totten
- 2020-2022. . . Larry P. Totten

Section 3. Harry Lee Waterfield Awards. KPR is composed of many former public servants who have given long years of service to the state, including the state police and county and city governments. These same people continue to serve the common interest and general welfare of the retired group. The Harry Lee Waterfield Awards were created to recognize some of those

48 who have provided exemplary service and achievement and who have demonstrated love and  
service to their fellow man in a humanitarian effort.

50 A. Creation of Awards. When approached by General Taylor Davidson, a then-member of  
52 KPR, Harry Lee Waterfield, Jr., agreed to sponsor awards to be presented annually in  
honor and memory of his distinguished father, the Honorable Harry Lee Waterfield, who  
54 served the people of Kentucky in many capacities, including the office of Lieutenant  
Governor, and who was the founder of the Investors Heritage Insurance Co. Since 1991,  
56 the KPR State Board has authorized the selection and recognition of KPR members each  
year to receive these two awards:

- 58 -- The Harry Lee Waterfield Achievement Award-- presented to a KPR member who  
has demonstrated outstanding leadership to KPR
- 60 -- The Harry Lee Waterfield Humanitarian Award--presented to a KPR member who  
62 has demonstrated special assistance to the welfare of others, particularly to KPR  
members

64 B. Selection of recipients and Presentation of Awards. The KPR Foundation Awards  
Committee is responsible for the selection of honorees and the presentation event at the  
66 Annual Meeting. Each year the membership is given an opportunity to nominate KPR  
members who have demonstrated unusual leadership or service that sets them apart as  
68 reaching high levels of achievement or humanitarian service.

70 C. Recipients of Harry Lee Waterfield Awards

72	<b>YEAR</b>	<b>ACHIEVEMENT</b>	<b>HUMANITARIAN</b>
74	1991. . . . .	Joseph Bruna. . . . .	Jane Jaggars
		Frances Travis	
76	1992. . . . .	Kelly Hubbard. . . . .	James Yonts
	1993. . . . .	Doris Thurman. . . . .	George W. Simmons, Jr.
78	1994. . . . .	Charles Brackett. . . . .	Edgar DeShazer (posthumously)
	1995. . . . .	James and Ann Peel. . . . .	James A. Moore (posthumously)
80	1996. . . . .	Bob Henson. . . . .	Stuart Victor
	1997. . . . .	Omar Greeman. . . . .	North Central Chapter
82	1998. . . . .	Gene Drake. . . . .	The Honorable Fred Bradley KY State Senator
	1999. . . . .	Alan McDonald. . . . .	Jean N. Bruce
84	2000. . . . .	General Taylor Davidson. . . . .	Fred Miller
	2001. . . . .	Dr. David Cosby. . . . .	Dana Rich
86	2002. . . . .	The Honorable Marshall Long. . . . .	David Y. Taylor
		KY State Representative and Senator	
88		The Honorable Gippy Graham	
		KY State Representative	
90	2003. . . . .	Bill Picket. . . . .	Robert Mueller
		Bill Spillman	
92	2004. . . . .	Shirley Clark. . . . .	Margaret Pennington
		Norma Collier	

94	2005. . . . .	Rebecca Heckler.....	C. Leslie Dawson
	2006. . . . .	Don Carden.....	Sister Jean Marie Hettinger
96	2007. . . . .	Martha Bradford.....	Duane Ellis
	2008. . . . .	J. David Corum.....	Lewis Jean
98	2009. . . . .	Mary Helen Peter.....	Eva Jane Jacobs
	2010. . . . .	Ray Brittain.....	Kathleen Roberts
100	2011. . . . .	Shirley Fallin.....	Milton Mains
	2012. . . . .	Joe Conway.....	Ruby Gordon
102	2013.....	Betty Hawkins.....	Claude Tiller
	2014.....	Jo Stratton.....	Linda Funk
104	2015.....	Ralph Wolff.....	Donna Slaton
	2016.....	Martha Parrish.....	Nancy Fox
106	2017.....	Jerry Connell.....	L. Peyton Adams
	2018.....	Larry Totten.....	Sarah (Missy) McCray
108	2019.....	Lexie Southworth.....	Cathy Kunkel-Mains
	2020.....	No Annual Meeting	
110	2021.....	No Annual Meeting	

## **HISTORY of KENTUCKY PUBLIC RETIREES**

114 Kentucky Public Retirees was first organized and incorporated as the Kentucky Association of  
 115 Public Annuitants (KAPA) on August 16, 1983, with two chapters - Frankfort and Louisville.  
 116 Members of the initial Board of Directors were Harold Wallace, Arnold Mitchell, Charles Hinds,  
 117 James Childers, Ed Hancock, Iris Barrett, Frances Travis, Taylor Davidson, Garnett Johnson,  
 118 Mitchell Tinder, Ed Deshazer, and Guyles Sutton. KAPA originally had a constitution but this  
 was repealed, as the law did not require one.

120 Charles Hinds was the first President of KAPA. Dues were \$5 a year. In 1986, a newsletter,  
 121 *KAPA COMMENTS*, was launched with Joe Bruna as the Editor. In 1988, the name of the  
 122 newsletter was changed to *THE KAPA KERNEL*. In 1987,

124 KAPA completed its third annual meeting with its two chapters and it was at this meeting that  
 125 the Legislative program was formulated.

128 The major fear in these early years was that our retirement benefits might be taxed since federal  
 129 and private industry pensions were taxed by the state. This did not happen as federal retirees  
 130 were exempted in the 1990 General Assembly. Also, in that Session, a 4.5% raise for state  
 131 retirees with an additional \$2.50/month for each year prior to 1982 a state employee had been  
 132 retired was passed due to KAPA lobbying efforts.

134 The year 1991 brought several changes. A major revision of KAPA's Bylaws was written by  
 135 Jim and Ann Peel which was adopted at the annual meeting that year. Membership climbed to  
 136 474 members at the beginning of the year. The Waterfield Awards were also instituted.

138 During a board meeting in April,1992, the Kentucky Association of Public Annuitants changed  
140 its name to Kentucky Public Retirees (KPR). Lincoln Trail in Elizabethtown became KPR's first  
new Chapter. Dues were raised to \$10 a year.

142 From 1994 through 1996, the Pennyriple Chapter in Madisonville, the Barren River Chapter in  
Bowling Green, the Northern Kentucky Chapter in Fort Mitchell, and the Bluegrass East Chapter  
144 in Lexington were organized. The Louisville Chapter was renamed the North Central Chapter.  
Other changes made during this time permitted the membership to vote by mail on changes in the  
146 Bylaws, extended the term of President to two years, and allowed for the hiring of a contractor to  
perform the administrative procedures. By the end of 1996, KPR's membership was 2,307.

148 There was only one goal for the 1996 session of the General Assembly - an annual cost-of-living  
150 adjustment which would increase retiree benefits by the lesser of 5% or the annual average  
increase in inflation. Our telephone tree was activated statewide, inundating legislators with  
152 requests to vote for our bill. So many members attended committee meetings that they had to be  
moved to accommodate our numbers. The bill passed and we continued to get COLAs until they  
154 were essentially ended during the 2013 General Assembly with SB 2.

156 During 1997-98, the Purchase Chapter in Paducah was organized. The Falls City Chapter in  
Louisville was organized by retired police and firefighters. This Chapter was later merged with  
158 the North Central Chapter. A Policy and Procedures Manual was developed for use by KPR  
State and Chapter officers. For all retirees, the death benefit paid by the retirement system was  
160 changed from \$2,500 to \$5,000.

162 In 1999, the Barren River Chapter became inactive. Happily, the Barren River Chapter was  
reestablished in 2011, and has become one of our most active chapters in membership growth.

164 KPR entered the internet age with the development of its own website. In 2000, an arrangement  
166 was established with the Personnel Cabinet providing KPR with quarterly lists of recent state  
retirees, which we still receive today. Dues were raised to \$15 annually effective in 2001.

168 In 2003 the Green River Chapter in Owensboro was established. In 2006, the FIVCO Chapter in  
170 Ashland was established after a rally held in Frankfort drew interest from a community group  
attending the rally. With Jefferson County having so many eligible retirees, it was felt that  
172 another Chapter was warranted and the Jefferson Regional Chapter was established in 2008.

174 After trying for many, many years, we were able to get Chapters established in the eastern part of  
the state. The first, the Covered Bridge Chapter, was established in Flemingsburg in 2009; the  
176 Cumberland Valley Chapter was established in 2012; Kentucky River Chapter in 2014; and, with  
the Big Sandy Chapter in 2016, KPR now has sixteen chapters covering the entire state.

178 In anticipation of legislative action during the 2016 General Assembly, KPR sponsored a "Save  
180 Our Pensions" Rally following the Governor's State of the Commonwealth Address. Speakers  
included the Governor, members of the Public Pension Oversight Board, and other supporters.

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184 In September 2016, Bylaw changes created the KPR Advocacy and Defense Fund. This fund  
186 would be used to pay attorneys to defend any changes made in the Inviolable Contract (the core  
188 protection to the defined benefit pensions) but could also be used for advocacy needs. With the  
190 release of the PFM Group report and its draconian reform proposals in mid-2017, as well as talk  
192 from the Governor and Legislators about additional pension reform during the 2018 Session, a  
194 letter was sent out to all KPR members asking for a donation to the fund. Within four weeks, the  
196 donations had totaled over \$27,000.

198 In the budget for fiscal years 2015 and 2016, for the first time in many years, the Governor and  
200 General Assembly appropriated full funding for the KERS and SPRS pension plans. During the  
202 next two years, additional money was appropriated in conjunction with full ARC payments.

204 During the 2017 General Assembly, working with Representative Derrick Graham as the  
206 primary sponsor, KPR finally achieved a legislative goal of changing the way vacancies in an  
208 elected Trustee position on the KRS Board was filled, by having only the remaining elected  
210 members vote to select a replacement for the position.

212 KPR focuses its efforts on protecting public retiree benefits. Of most concern is the growing  
214 unfunded liabilities in all of the KRS plans. Over a period of 22 years, Governors and  
216 Legislators failed to appropriate sufficient funding for the KERS and SPRS pensions during 14  
218 of those years. Exacerbating this underfunding were two recessions, wildly varying investment  
220 returns, unfunded benefit enhancements, employer funding methodology, and other  
222 administrative issues. As of June 30, 2020, the KERS-NH pension system had a funded ratio of  
224 only 14.2%, in contrast with a funded ratio of 139.5% as of June 30, 2000.

226 The budget for fiscal years 2021 and 2022 continued this mandatory funding. Also in fiscal  
228 2022, the employer funding methodology will change to “normal cost” plus a portion of each  
230 employers’ unfunded liability instead of “percent of payroll.” This applies to only KERS non-  
232 hazardous employees.

234 In both the 2008 and 2013 General Assemblies, major legislation was passed attempting to deal  
236 with the ever-increasing unfunded liabilities by primarily reforming future pension benefits.  
238 Neither of these bills met this goal and yet another major reform was passed in the 2018 Session,  
240 but was declared unconstitutional by the State Supreme Court. Also in 2018, in legislation  
242 accompanying the budget bill, the pension income exclusion was reduced from \$41,110 to  
244 \$31,110 as part of an overall effort to increase state revenue.

246 Over the past several years, KPR has expanded its presence in all activities of the Kentucky  
248 Public Pensions Authority, KRS Board, CERS Board, and Legislative activities that deal with  
250 public pensions. At the Capitol, we attend all meetings of the Public Pension Oversight Board  
252 and the particular Legislative Committee meetings that deal with pensions. We attend all  
254 Committee and Board meetings of the pension system and its governing Boards. To help in  
256 communicating with our members, we created a Facebook page in 2015 and also revamped the  
258 original statewide alert system with periodic News Bulletins covering important issues. The  
KPR web site has been enhanced through the years adding news, the Policies and Procedures  
Manual, photos, copies of *The Kernel*, as well as the ability for current and new members to pay

230 their dues on line. A Legislative Agent was first hired in 2010, a paid position that continues  
today. KPR publishes at least four editions of *The Kernel* each year reaching every member.  
232 The KPR Board meets quarterly, with all fifteen Chapter Presidents serving as members along  
with the elected officers and the Standing Committee Chairs. The number of KPR Chapters  
234 changed in 2019 due to the merger of Jefferson Regional Chapter with North Central Chapter. As  
it has been since the beginning, everyone serves as volunteers.

236 Looking forward, maintaining our momentum will be critical to our organization's well-being. It  
is relatively easy to attend meetings; it is far more difficult to maintain the spirit of participation  
238 and involvement that is needed for a successful membership organization. Simply put, we need  
people to step forward and build on the successes of those who have come before them. For all  
240 public retirees – past, present, and future – let's make sure that happens.

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