CTA/NEA-RETIRED AWARD WINNING NEWSLETTER

VOLUME X • ISSUE I • FALL 2023

RetireeAdvocate



STAY CONNECTED • BE PROTECTED • ENJOY BENEFITS



Orval Garrison, President

CTA/NEA-Retired

PRESIDENT'S PERSPECTIVE

have been asked WHY as President and elected Delegate I did **not** make it to the NEA-Retired Annual Meeting and the NEA Representative Assembly in Orlando, FL (June 28—July 6, 2023). It happens that multiple flight cancellations, airline personnel shortages, and a continental "heat dome" conspired to push my arrival at Orlando to July 5. With the RA ending July 6, returning home seemed reasonable. Our other 20 Delegates, some with flight problems, did make it through, joining the always large CTA Delegation.

More positively, at that **NEA-Retired Annual Meeting**, CTA/NEA-Retired was once again recognized with its impressive membership growth. Even during the pandemic, our statewide membership continued to grow. I attribute this in part to our Liaison program through which we maintain ongoing connections to the many Active CTA chapters, learn who the retirees are, and contact them to encourage joining

CTA/NEA-Retired. Membership in our state retiree affiliate allows continued access to a host of CTA and NEA Member Benefits. Take Note: Lifetime and Pre-Retired Lifetime membership are now available in three monthly credit card payments of \$200 each. GO to www.cta.org/retired to Join Online.

Also, in late August the Board of CTA/NEA-Retired spent several Summer Planning days together working through a lengthy agenda of topics designed to move our Association forward for the 2023-2024 year. Budget, committees, goals, scholarships, local chapters, communications, legislation, and numerous other issues were considered in long days of deliberation and sharing. I thank the Board members for their time commitment. This Summer Planning effort is just one example of how elected representation is far more than "just four meetings a year."

The CTA/NEA-Retired sponsored "Retirement Issues" webinars are up and running again. These are on-screen presentations advertised to seasoned Active members (yes, we use the CTA data bank) who are likely closer to retirement. Expert CTA Staff presenters Rose Luna, Mitch Olson, and Brian Breslin provide information about CalSTRS, Social Security, Medicare, and Member Benefits. A webinar for CalSTRS members occurred on November 9 and two more are scheduled for January 18, 2024 and April 2, 2024. A webinar for CalPERS members who are also members of CTA and NEA was held on November 8.

Continued on page 7

DELEGATES TO NEA'S REPRESENTATIVE ASSEMBLY STAND WITH FLORIDA EDUCATORS

By Don Stauffer, District 1 Director

On July 2-6, twenty of our elected CTA/NEA-Retired delegates and more than 6,000 delegates from across the country met in Orlando to set association policy and priorities for the upcoming year for the 3 million member NEA. Attendees brought with them a shared sense of anxiety and concern about the direction of our country's educational system and a commitment to reshape the educational landscape and societal values. The conference addressed pressing issues faced by educators not only in Florida but throughout the United States. Following are some of the highlights.

Inspiring Message from President Joe Biden & First Lady Dr. Jill Biden

President Joe Biden and First Lady Jill Biden, an NEA member, celebrated public education and reaffirmed their commitment to listening to educators. They emphasized their vision for public education, which spans from universal preschool through high school, providing paths to both careers and college. President Biden stated "educators have champions in

Continued on page 3

BOARD OF DIRECTORS

President Orval Garrison 1898 Kelli Way Fortuna, CA 95540 Home: 707-682-6559 Cell: 805-746-0906 oeghdta@gmail.com

Vice President
Dana Dillon
Cell: 530-949-2676
danad.cta.nea.r@gmail.com

Secretary-Treasurer Debra SheehanCell: 949-633-7222
Dsheehan.ctanear@yahoo.com

District 1 Director Don StaufferCell: 916-802-3005
djstauffer@gmail.com

District 1 Director Lynette HenleyCell: 707-688-3004
henleyl@aol.com

District 2 Director
Karen Schuett
Cell: (661) 301-4415
kschuett8@gmail.com

District 2 Director *Ken Johnson*Cell: 209-629-6206
mailtokenj@gmail.com

District 3 Director Bonnie Shatun Home: 818-386-9440 Cell: 818-268-1149 bshatun@aol.com

District 3 Director Anne Johnson-Curtis Cell: 760-954-4299 nedanne@me.com

District 4 Director Patty Blume Taylor Cell: (909) 226-8364 pattysbta@aol.com

District 4 Director Gerald GandolfoCell: 949-395-1292
maruk@cox.net

Ethnic Minority Director/At-Large Mary Rose Ortega Home: 323-254-2919

Home: 323-254-2919 Cell: 323-839-8857 Mortega25@aol.com

EDITOR

Bonnie Shatun

Email: bshatun@aol.com

PHOTOGRAPHS
Retired Members

BOARD REPORT by Debra Sheehan, Secretary-Treasurer

CTA/NEA May 20, 2023 General Meeting and Retired Board Meeting October 20, 2023

Action Items: At the May 20, 2023 General Membership meeting, the following were approved: Bylaw changes; 2022-2023 Goals; proposed 2022-2023 Budget; and the formation of a Budget Committee. At the October 20, 2023 Board Meeting, the following were approved: new chapter bylaws for West County Retired (Richmond) and CCA-Retired Long Beach (Community College Association); four Pedretti Scholarship recipients at \$1,500 each; funding for the Secretary/ Treasurer and two members to attend the NEA-Retired Conference March 3-5, 2020 in Chicago for up to three days; a \$300 Chapter Assistance will be available for every chapter, every year (with receipts); Bylaw changes were referred to the General Meeting on March 1, 2024; Standing Rules changes were approved; and CTA was urged to reinstate reimbursement at the same rate as other State Council members for CTA/NEA-Retired State Council members when they attend statewide political party events as voting members.

Reports:

1) President Orval Garrison's described increased report: He chapter outreach and shared the new member benefits fliers. Our RAN (Retired Action Network) list is being updated and he asked those members interested in being added to the group that reaches out to legislators on important issues, to contact their Board member or an officer to be added. He discussed our two new chapters, West County Richmond and CCA-Retired Long Beach. Our CTA/ NEA-Retired Issues Conference will be held Feb. 29-March 1, 2024 at the Westin Bonaventure in Los Angeles. An Ad Hoc planning committee was approved to plan our conference. Orval announced the long-requested approval of paying lifetime dues in three consecutive monthly installment payments. Finding a method for members to donate to the CTA PAC

was referred to the Issues Committee. All chapters will be asked to send in their most recently approved bylaws, to update our archives.

- 2) CTA Legislative advocate Seth Bramble reviewed newly signed SB 765, which will allow new retirees in some situations to return to CalSTRS work before the 180 days separation and raises the earnings cap from \$50,000 to \$70,000 for the 2024-2025 and the 2025-2026 school years.
- 3) CTA Vice President Leslie Littman was welcomed as our new liaison to the CTA Board and responded to questions.
- 4) Vice President Dana Dillon announced that Conference Ambassador assignments were updated and explained bylaw changes referred to the March 1, 2024 General Meeting. Standing Rule changes were explained and approved.
- 5) Secretary/Treasurer Debra Sheehan presented our Revenue and Expense statement. Our membership has increased by 368 from August 2022 to August 2023. The Russo Scholarship balance is \$9,219.00. The Pedretti Scholarship balance is \$125,000.00.
- 6) Board Member Reports were presented by the Directors at the Annual Meeting and membership efforts, Service Center and Chapter activities, and chapter revitalization efforts were described
- 7) NEA-Retired Board Member Ed Foglia discussed that although the Social Security Fairness Act (H.R. 5723) has the necessary 298 sponsors, it is currently stalled due to the House of Representatives turmoil. A recent article about GPO/WEP was included in the NEA Today magazine.
- 8) Information Items: The next Board Meeting will be held Friday, January 26, 2024 at the Westin Bonaventure in Los Angeles. Like us on Facebook: www.facebook.com/www.facebook.com/ctanearetired (no "membership" in Facebook required).



Members of CTA/NEA-Retired attending the NEA-Retired Annual Meeting in Orlando, Florida joined in the celebration of the 40th Anniversary of NEA-Retired which has grown to 325,000 members. NEA President Becky Pringle thanked NEA-Retired for 40 fabulous years of power and progress and continuing to grow in number as well as influence and strength.

"Unbowed and unbroken, and with a resolve that is unwavering, NEA, you are leading the work to promote, to protect, and to strengthen public education!"...
NEA President Becky Pringle in her address to the NEA Representative Assembly, July 3, 2023



DELEGATES TO NEA'S REPRESENTATIVE ASSEMBLY STAND WITH FLORIDA EDUCATORS continued from page 1

the White House," acknowledging the difficulties they faced in recent years and expressing gratitude for their dedication. The administration's support, including the American Rescue Plan, has made a profound impact with educators and their unions included in local decisions regarding its allocation.

Secretary of Education Miguel Cardona: A Vision for Change

Secretary of Education Miguel Cardona delivered a thought-provoking talk, challenging the negative discourse surrounding education. He called for a shift towards constructive dialogue centered on solutions rather than blame. Cardona highlighted the underappreciation of educators, emphasizing the need for better facilities and working conditions. He called for financial recognition of educators' contributions and dedication, encouraging them to stand up for their rights and am-

plify their voices. Cardona's vision includes both college and career readiness, moving away from teaching to standardized tests, and advocating for high standards and authentic assessments.

New Business Items: Inclusivity and Equity

The topics of this year's New Business Items (NBIs) provided a glimpse into the concerns of the educators at the RA. Over a third of the 94 NBIs focused on issues of inclusion and protecting rights, covering topics such as LGBTQ+issues, antisemitism, disability rights, racism, immigration, and mental health. These NBIs were solidly supported, showcasing the commitment of educators to foster inclusive environments where every student feels valued and heard.

NEA General Counsel Alice O'Brien: Upholding Rights in Changing Times

NEA General Counsel Alice O'Brien addressed troublesome Supreme Court decisions such as allowing creators to exclude LG-BTQ+ customers, and stopping student loan debt relief, among others. She also highlighted the positive Supreme Court action in upholding Section 2 of the Voting Rights Act. O'Brien encouraged educators to rise above these legal challenges and be champions of change.

Helena Donato-Sapp: A Student's Journey to Triumph

Helena Donato-Sapp, a resilient 14-year-old, shared her transformative educational journey as an African American with learning disabilities and gay fathers. She celebrated educators who see her potential beyond her challenges and advocated for respectful language when addressing people with disabilities.

Derrick Johnson: Leading the Charge for Equity

Derrick Johnson, President of the NAACP, highlighted the intersections of equity, politics, and education. He called for unity and cultural understanding, criticizing divisive politics and emphasized the strength of diversity.

In summary, the 2023 NEA Representative Assembly was a powerful call for action that united educators, advocates, and leaders in their commitment to championing rights, inclusivity, and a brighter future, determined to make a lasting impact on education and society.



At the 2023 NEA-Retired Annual Meeting held in Orlando, Vice President Dana Dillon accepted two Membership Growth Awards on behalf of CTA/NEA-Retired. One award was for the 5.2% increase in membership and one for adding 1,047 new members in the 2022-2023 fiscal year.

CARA CELEBRATES 20 YEARS OF ADVOCACY

By Jo Carson, Liaison to CARA

California Alliance for Retired office. Our message was "No cuts to Americans (C.A.R.A.). Gov. Newsom Medicare and Social Security." As in signed five bills supported by CARA. past years, despite our prior requests We resumed in-person rallies. CARA via email, letters, and phone calls also celebrated twenty years of requesting a friendly meeting, there advocacy for seniors and people with was no response. Over 750 members disabilities at our twentieth annual made the trip. Despite the Speaker's convention. Members of CTA/NEA- absence we made our point. "Hands

and can participate in all CARA activities. Among the legislation sponsored or co-sponsored by CARA are:

AB 751 Elder Abuse: Requires law enforcement agencies to update existing training and policies to protect seniors.

AB 449 Hate Crimes: Requires a11 1aw enforcement agencies to adopt policies instructing officers on how to respond to and report hate crimes.

SB 523 Climate Corporate Data Accountability Act: Requires all U.S. based corporations with gross revenues of \$1 billion

or better to publicly disclose their greenhouse gas emissions annually.

AJR4 Medicare Protection Act: A Joint Resolution that calls for the abolishment of the ACO REACH program, which incentivizes profiteering by allowing Medicare patients to be placed in the hands of private corporations without their consent.

In 2023, CARA rallied in person and via Zoom with state legislators in Sacramento and at the community offices of our local representatives. Our largest rally was at then House

It has been another active year for the Speaker Kevin McCarthy's Bakersfield Retired are also members of CARA off Medicare and Social Security."



The Highlight of 2023 was celebrating twenty years of CARA advocacy. CARA was established in 2003 as a grassroots movement to empower elders with the help of 100 affiliated organizations from both labor and the community. Affiliations have grown over the years and now include CTA and CTA/NEA-Retired. The Convention also honored CARA's founding leaders Nan Brasmer and Addie Brinkly. Nan served as president for 18 years and is still on the CARA Board. Sadly, we lost our feisty "Miss Addie" in August while she was still serving as Vice President.

CARA delegates completed important business at the convention. We installed board members, reviewed our legislative agenda, and once again activated our Seniors Vote Project for 2024. CARA is non-partisan. We do not endorse candidates. We seek to inform senior voters about where candidates stand on issues crucial to elders, so that they can vote in their own best

> interests. We invited all candidates seeking to fill the seat of the late Senator Diane Feinstein to speak at our convention. Barabra Lee, Katie Porter, and Adam Schiff spoke with us and answered questions. They all pledged to protect Social Security and Medicare and support repealing the WEP and GPO, that penalize teachers and other public employees. Additional speakers spoke about the importance of organizing a base of volunteers for the 2024 election. We also passed two Resolutions. One addressed Climate Change. The other supports the protection of Social Security and Medicare. And, we

took a position, with seventeen other organizations, in support of LTSS (Long Term Services and Support) for all Californians. These services will provide personal care and services that allow for independent living outside of skilled nursing facilities.

For more about our legislative action and upcoming activities like the wonderful Friday Forums, go to CARA on Facebook or to www. californiaalliance.org and sign up for the CARA Alerts. In early 2024, please look for our 2023 Legislative scorecard, prepared by CARA's Legislative and Political Director.

PUBLIC PENSIONS CAUGHT IN "CULTURE WARS"?

By Dana Dillon, Vice President and Former Chair of CalSTRS Board

We have written in past issues about the CalSTRS Net-Zero Initiative. This initiative is driving the CalSTRS pledge to be carbon free by 2050. To move toward this goal, CalSTRS is heavily involved with ESG (Environmental, Social, and Governance) matters and investments. In fact, CalSTRS has been involved in the ESG investment movement for over thirty years, through proxy voting, engagement, and sustainable investing.

When President Biden took office, he issued an executive order that the Dept of Labor create a rule that allows public pension funds to consider ESG factors when making investment decisions and to exercise shareholder rights as a part of their fiduciary duty. This created a safe background for institutional investors like CalSTRS to ramp up their ESG efforts.

Also ramping up efforts and citing recent disastrous wildfires and flooding, climate change divestment proponents have begun aggressively advocating for divestment from fossil fuels.

As a backlash against climate change advocacy, a slate of legislation has put public pensions into the heart of the culture wars being fought in a majority of states in the US. Since 2021, twenty-two states have adopted some form of ESG-related laws. Eighteen of those have adopted "anti-ESG" legislation with fourteen of those adopting it in the 2023 legislative session. So, it should come as no surprise that Congress passed legislation to overturn the Department of Labor's ESG rule.

When this legislation crossed his desk, President Biden issued his first veto. The president also survived a challenge brought on by 29 state attorneys general over the ESG rule.

Concerned about these events, NEA President Becky Pringle, along with other labor leaders, conducted a webinar regarding how our pension systems are being affected by this legislation and the fight we will have to wage to protect our pension systems from governmental interference.

Your CTA/NEA-Retired liaisons will be at the forefront of this fight, not only supporting CalSTRS' efforts regarding sustainable investing and their advocacy to push for corporate reform in light of climate change, but to advocate against detrimental governmental interference in the operation of our pension system.

For more information regarding CalSTRS efforts, you can find their Sustainability Report and Green Initiatives Task Force report at calstrs.com/sustainable-investment-reports-and-studies.

MEMBER BENEFIT SAVINGS ARE WAITING FOR YOU

As the days are cooling down and the sun rises later and sets earlier, it's a reminder that we're heading into winter. The good news is that, as CTA/NEA Retired Members, you still have access to your CTA and NEA Member Benefits and there are a number of benefits that are particularly helpful this time of year.

To discover all of your CTA Member Benefits visit www. CTAMemberBenefits.org and register on the website. To register you will need your Membership number including the zeros. It's



on your membership card and the mailing label of all publications you receive from CTA. With the holiday season approaching, members can stretch their "holiday shopping budget" by utilizing the Access Program and downloading the "My Deals" app on your phone. Be sure to also check out the various travel deals, especially hotels.

As you journey <u>"over the river and through the woods"</u> and you need to rent a car, check out the <u>CTA Rental Car Program with Enterprise</u>. Travel deals including car rentals are also available from NEA at <u>www.neamb.com</u>. Check out the NEA Travel Program and the Discount Marketplace. Do compare.



Did you know that trips can be arranged to visit the CalSTRS Building in Sacramento? Members of Chico Retired did just that and had a chance to talk with CalSTRS Chief Investment Officer (CIO) Christopher Ailman (pictured fourth from left). He oversees a portfolio valued at \$307.9 billion, which is the nation's second largest public pension fund. He shared how the CalSTRS investment team of more than 200 has done such a good job of weathering the ups and downs of the market.

KEEPING MENTALLY FIT IN RETIREMENT

By Patty Taylor, District 4 Director and Assistant Executive, Director of the CA Association of School Counselors

While it is critically important to take care of our physical health as we age, it is also vital to protect our mental health. Seniors may face new social and/or emotional difficulties such as loneliness, medical problems, or the loss of a loved one. Protecting mental health later in life is absolutely critical to one's overall quality of life. Experts agree that seniors are more vulnerable to developing mental health disorders, so it is critical to be proactive in strengthening our minds.

Here are some ideas to improve your mental health in these golden years!

- 1. **Socialize as often as possible**: Loneliness is a common struggle for seniors. Schedule recurring events with friends and family, look to your community for social events, and check out senior centers with classes and gatherings.
- 2. **Volunteer or give back**: For a sense of purpose, consider volunteering at a school, a local food bank, a hospital, a political campaign, or even getting involved in CTA/NEA Retired!!
- 3. Work on your cognitive health: To avoid depression, anxiety and confusion, it is important to maintain language, memory and focus skills. Try activities like jigsaw puzzles, crosswords, Sudoku, adult coloring books or online games like Wordle and Connections to keep sharp. Card games and board games with friends and family are great ideas as well.
- 4. Exercise: Physical activity is one the best practices for good mental health no matter how old you are! Regular exercise can provide many benefits including giving structure to your

day and allowing opportunities to socialize and get outside. Exercise can make you feel happier too!

- 5. Learn a new skill or refine an old one: Ideas can include painting, learning a new language, playing a musical instrument, knitting, crocheting, scrapbooking, singing, writing, or drawing.
- 6. **Pets**: If you enjoy animals, having a pet can provide emotional support and having someone to care for adds a sense of purpose in daily life.
- 7. Look to CTA and NEA member benefits for good resources: One important benefit for us is Calm, an award-winning app for guided meditation, relaxation and sleep. It's now free for you and up to five family members. Go to https://www.ctamemberbenefits.org/calm where you can activate your free subscription and sign up for a webinar. considered.
- 8. Seek help when needed: Finally, it is critical to recognize when you might need help. Seek out support groups for specific issues. A mental health therapist can provide a safe and private space to explore the challenges you are facing. It's good to look for someone who specializes in working with seniors. Counseling can help you improve your cognitive skills and give you an opportunity to connect with another person who may be able to help you explore options you may not have considered.

I encourage you to make the most of this time in your life and be sure to take care of yourself always! Be well. Be safe. Be fabulously happy!



On November 3, High Desert CTA/ NEA-Retired met at a favorite Italian restaurant in Apple Valley for brunch and their meeting. Membership Chair Gordon Williamson gave a very entertaining presentation on the Art of Storytelling and told two folk tales: Iron John and The Mare. A business meeting followed with updates on the GPO/WEP, the High Desert Leadership Conference and CTA-Retired's Issues Conference. President Ken Kerr reminded members to bring clothing donations to their December meeting for their homeless project.



NOMINATIONS ARE OPEN FOR THE 2023 ELLEN LOGUE WHO (WE HONOR OURS) AWARD

Annually, CTA/NEA-Retired honors one member who has continued to be active in retirement by exhibiting leadership in the Association, in public education, and in the community. The recipient will be recognized at our Annual CTA/NEA-Retired Issues Conference to be held on February 29-March 1, 2024.

Past winners of the award are:

2023 – Ned Curtis

2022 – John Graham

2021 – Ed Foglia

2020 – Marc Sternberger

2019 – Jim Burfeind

2018 - Bob McDonough

2017 – Frank Tarantino

2016 – Arlene Pavev

2015 – Bonnie Shatun

2014 - Val Muchowski

2013 – Orval Garrison

2012 – Tim Jenkins

Nomination forms can be found online at www.cta.org/retired. If you would prefer to receive the form in the mail, please call CTA/NEA-Retired at 650/552-5439 or email CTA-Retired@cta.org. Deadline for submission is Friday, January 19, 2024.



NEWLY RETIRED MEMBERS

If you are a Pre-Retired Life member who has retired, you must notify the CTA Membership Department by calling 650-552-5278 or send an email to membership@cta.org notifying CTA of your change in status. You will not be able to vote in future CTA/NEA-Retired elections or run for offices if you are still listed as "Pre-Retired!"

PRESIDENT'S PERSPECTIVE continued from page 1

CTA/NEA-Retired is happy to welcome new local retired chapters. Last year we welcomed Capital Area EA-Retired in the greater Sacramento area. This year we welcome West County-Retired (Richmond area) and CCA-Retired (Long Beach originated). Board leadership approved Bylaws for these chapters, making them eligible for limited financial start-up assistance. More importantly, the growth of local retiree chapters highlights our continued growth statewide. We do not forget that any CTA or NEA member may join CTA/NEA-Retired even if there is no local retired chapter nearby. We continue to encourage core groups who wish to form a local retired chapter. Contact me (oeghdta@gmail.com) if you know of members who want to organize.

Finally, 2024 is an election year for CTA/NEA-Retired. Officer positions and terms for Board members will be on the ballot. Declaration of candidacy information will be announced. Current officers and Board members encourage all members of CTA/NEA-Retired to give consideration to running for office. Still, before one thinks, "I will do it," please know that the responsibilities of office are considerable. Leadership in an organization of our size is not a minimal commitment.



On November 8, Bay Valley-Retired member and Getty Center Docent Debbie Breeding guided the tour group through the newly opened large major loan exhibit "William Blake Visionary" which combined his poetry and images through radical graphic techniques. She helped participants explore the artist-poet's imaginative world through his most celebrated works. The next stop was to view Jean-Francois Millet's Man with a Hoe (The Labourer), a political comment on peasant plight in the 1860s. After a relaxing lunch in the Café, everyone was free to explore more of the museum and gardens.

SAVE THE DATE

Come join us for our 19th Annual CTA/NEA-Retired Issues Conference which will be held February 29-March 1, 2024 at the Westin Bonaventure Los Angeles. You don't have to be retired to participate. Attend and learn how to stay connected, be protected & enjoy great benefits. Registration will be opening soon at www. CTA.org/conferences.

Plan to attend sessions to:

- Find out about local CTA/NEA-Retired chapters and events in your area
- Make sense of CalSTRS, CalPERS and Public Employee Pensions
- Learn what's at stake in the 2024 elections
- Be updated on NEA's Advocacy to protect Social Security & repeal GPO/WEP
- Hear about Staying Healthy and Active in Retirement
- And more

PRESORTED
FIRST CLASS MAIL
US POSTAGE
PAID
OAKLAND, CA
PERMIT NO. 379

RETURN SERVICE REQUESTED

Happy Holiday Season
Wishing a happy,
healthy and safe holiday
season and new year
to you and your family
from the CTA/NEARetired Officers and
Board of Directors!



Bay Valley-Retired is fortunate to have several members who are also docents at local museums. In the spring, docent Tanya Monabat guided the tour of the Huntington Library, Gardens and Museum sharing the history of the Huntington family, the mansion, botanical gardens and art, including it's most famous painting, Gainsborough's The Blue Boy. The tour was followed by a relaxed lunch in the Huntington Café.

