



# Retiree Advocate



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**Orval Garrison, President**  
CTA/NEA-Retired

## PRESIDENT'S PERSPECTIVE

Well, where have we been and where are we now? As far as education issues and candidates go, the outcome of the 2022 midterm elections in California was basically positive. No election ever results in completely agreeable outcomes.

We have read that certain voter groups targeted local school boards intending to replace incumbents with those wanting to censor books, “cleanse” curriculum, and advance narrow political agendas. In California, this effort seems not to have fully succeeded. Yes, there are exceptions, but generally California remains a steady state regarding school boards and education policy. The public trusts the professionals who educate their children. (See the article on page 5)

Now, let us consider again the 800-pound gorilla—the Social Security penalties known famously as GPO/WEP (Government Pension Offset/Windfall Elimination) laws. CTA, NEA and other labor groups around the nation have been working on repealing these laws for so long (going back to the 1980’s) that it sometimes seems we are dealing with the building of or tearing down of an ancient pyramid. As said before:

**Elections Matter.** In January 2023, a political party took over the House of Representatives that has no historical interest in expanding Social Security. Before the 2022 election cycle, some members of that party expressed a desire to postpone Social Security eligibility to 70 years of age and to increase Medicare monthly premiums. I am not making this up. It is documented.

And so, the battle continues. Unfortunately, other state retired presidents and I occasionally receive complaints declaring that “NEA is not doing enough to repeal GPO/WEP.”

Let me share with you **briefly** what NEA and NEA-Retired have been doing just in 2022: Day of Action (May 24, 2022) more than 500 calls and 6,200+ emails to Congress; 74,000+ member messages to Congress; NEA Rep. Assembly (July 2022) commits money to lobbying for GPO/WEP repeal; (September 2022) Social Security Fairness Act gets markup in House Way & Means because of intense NEA lobbying effort; (October 2022) Governmental Relations lobbies for floor vote for GPO/WEP; (December 2022) NEA lobbying cadre meets with lead sponsor of H. R. 82 about reintroducing the Social Security Fairness Act in the next session of Congress. The NEA Representative Assembly each year commits itself to the repeal of Social Security penalties so that people who paid into the system get what they rightfully earned.

Regarding local California issues, in the last ADVOCATE I shared the outcome of our successful legislation (SB 868) and (AB 1667) to ramp up pensions for our most elderly and to address CalSTRS overpayment “paybacks.”

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## CalSTRS UPDATE – OUR LEGISLATION SIGNED INTO LAW AND FINANCIAL OUTLOOK

**By Dana Dillon – Vice President and Former Chairperson of the CalSTRS Board**

Through all last year, we’ve been informing you of the creation and progress of two CTA sponsored pieces of legislation that will provide relief for CTA/NEA-Retired members. After members testifying, lobbying representatives, and advocating with the Governor, we are happy to inform you that both were signed into law on September 29th, 2022.

The first piece of sponsored legislation is SB 868 (Cortese). SB 868 directs CalSTRS to use surplus monies in the Supplemental Benefits Maintenance Account (SBMA) Program for the benefit of members retired the longest. Beginning in July 2023, those persons who retired prior to 1999, will get an increase in SBMA payments according to what year they retired. For more information about qualifying for this additional benefit, please see earlier editions of the CTA/NEA-Retired Advocate or contact CalSTRS.

The second piece of sponsored legislation is AB 1667 (Cooper). At the September CalSTRS Board meeting, your liaisons to CalSTRS urged the Board to vote to support the legislation. The Board did vote to support the bill which was critical to it being signed by the Governor.

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# BOARD OF DIRECTORS

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## PHOTOGRAPHS Retired Members

## BOARD REPORT

by Debra Sheehan, Secretary-Treasurer

### CTA/NEA-Retired Board of Directors

Meeting (10-22-2022)

**Action Items:** Approved the revised 2022-2023 Goals and Mission Statement, tabled a dues-increase discussion to our January 2023 Board Meeting, referred to our Budget Committee an adjustment to our 2022-2023 Budget, approved Standing Rules changes to create four committees (Membership, Issues, Communication, and Political Action).

### Reports:

#### 1) CTA Legislative Advocate Seth

**Bramble** presented an update on legislation. Pension-related SB 868 and AB 1667 sponsored bills have passed, thanks to joint efforts and collaboration. He credited targeting lawmakers, member testimony at hearings, and our membership lobbying their elected representatives. He discussed the proposed lift on the cap of waiting 180 days before substituting and reminded us that school districts can apply for a waiver.

#### 2) CTA Staff Rose Luna and Mitch Olson

reported on the four Retirement Issues Webinars that they are presenting this year. They suggested that we reach out to teachers aged 25-40 to inform them of the need to supplement their pension and consider a 403B.

3) **President Orval Garrison** discussed the successful legislative passage of SB 868 and AB 1667. He presented the 2022-2023 Goals and Mission Statement that were revised during the Board Planning Session during this past August. He announced that the upcoming Advocate will be electronic and will come out before the November election. It will include political action information, WEP/GPO updates, and disaster relief information. Orval updated us on the ongoing efforts to update our website. He mentioned that the CalPERS Long Term Care rate increase lawsuit is not connected to CTA. Orval announced that there is a need to raise funds for the Russo Scholarship program and that we awarded three \$1,500 Pedretti Scholarships this first year of the program. He discussed Standing Rule changes from the Summer Planning Meeting that include the creation of the following committees: Membership, Issues, Communication, and Political Action. He mentioned the NEA-Retired Conference (March 12-14) that the officers and two additional members will attend. He announced that the Board is working on organizing the CTA/NEA-Retired Issues

Conference, to be held in Santa Clara on March 16-17.

4) **CTA Vice President David Goldberg** shared his appreciation of the CTA/NEA-Retired efforts with the successful pension-reform bills. David discussed Community Schools, their growth, organizing, and the CTA efforts with training. He described the Community College Association's effort starting a CCA-Retired group. David is the CTA Board Liaison to CTA/NEA-Retired.

5) **Vice President Dana Dillon** described the challenges and expense of sending Ambassadors to conferences and asked for more Ambassadors. She discussed the CTA suggestion that we send fewer liaisons to CalSTRS meetings. We currently send Ed Foglia, Orval Garrison, Dana Dillon, and Don Stauffer. Dana explained the importance of having our people at every one of these meetings and pointed out our successful collaboration with the pension-reform bills that just passed with our help. Dana addressed the question from a Retired chapter of whether to hold elections regionally or with all members voting. She is checking with NEA-Retired for clarification and guidance.

6) **Secretary/Treasurer Debra Sheehan** reported that our membership has increased by 1,330 since August of 2021, with a new total of 20,470. The Russo Scholarship balance is \$9,118 and the Pedretti Scholarship balance is \$211,800. She reported that the advertised social gathering at the Region 2 Conference had no attendees. Debra explained that the whole CTA/NEA-Retired Budget process is being reviewed, since our budget has remained the same while our membership has increased from 15,000 to 21,000. Our Budget Committee consists of Debra Sheehan, Dana Dillon, Don Stauffer, and Lynette Henley. They are working with CTA to update our budget.

7) **Board Member Reports** were presented. The Board Members are working with their chapters to increase participation and organizing efforts. Hybrid meetings were suggested. Several retired groups around the State are being assisted to form new chapters. Ethnic Minority-at-Large Director Mary Rose Ortega mentioned her participation with CARA, the NEA Social Justice Committee, and the NEA Political Action Fund. Continued on page 7



# CalSTRS UPDATE – OUR LEGISLATION SIGNED INTO LAW AND FINANCIAL OUTLOOK

continued from page 1

AB 1667 will change how CalSTRS recoups monies that have been overpaid to retirees. Among other improvements, this legislative proposal will make districts and CalSTRS responsible for overpayment recoveries. Beginning in July 2023, no member should have to pay for mistakes made by others!

In more news from the fall CalSTRS Board meetings, the impact of global market volatility caused by inflation, rising interest rates, the war in Ukraine, and the residual effects of the COVID pandemic had a huge impact on CalSTRS FY 21-22 net return on investments which was -1.3%, CalSTRS' first negative return since 2009. Even with this return, the total fund value as of June 30, 2022 was \$301.6 billion

–not so far away from the fund's high of \$320 billion.

CalSTRS remains in position to be fully funded by 2046, due in part to their historically high return of 27.2% for FY 20-21. CalSTRS is a long-term investor with a goal of achieving an average return of 7.0% over the long run to meet pension obligations. The performance of the fund over all measured time periods (30, 25, 10, 5, and 3 years) is over the assumed rate of 7%.

In furtherance of its Net-Zero Greenhouse Initiative, the CalSTRS Board approved a four-part implementation framework to achieve net-zero greenhouse gas emissions by 2050 or sooner, including: (1) a 2030 Interim Emissions Reduction Goal

of 50% for the Total CalSTRS Fund; (2) a Net-Zero Investment Decision Making Process, so that investments are considered through a climate change lens; (3) reducing emissions in Public Equity portfolio by adopting a target allocation of 20% to the MSCI ACWI Low Carbon Target Index, thus significantly increasing CalSTRS' "green" funding; and (4) integrating climate scenarios into the CalSTRS Asset Liability Management Framework, so that the Board considers the implications of climate change when considering the asset mix for the CalSTRS portfolio. Your liaisons to CalSTRS will continue to encourage the Board to push for a quicker completion of the Net-Zero Initiative as CalSTRS moves forward with it.

## CalSTRS Annual Member Survey:

Each year, CalSTRS conducts its Member Survey with a random sample of active and retired members about member experience with the delivery of CalSTRS benefits and services. The 2023 Member Survey launched on Wednesday, January 11. If you received it, your feedback is greatly appreciated. The September 2022 survey results are available at [CalSTRS.com](https://CalSTRS.com).



CTA Conferences are back in person and CTA/NEA-Retired members are staffing tables to share information about the benefits of membership. Pictured here at the Region 3 Leadership Conference in Los Angeles are Jane Gordon-Topper, Lois Hale and Anne Johnson-Curtis (with Missy).



**If you have been impacted by the recent storms and floods, remember CTA/NEA-Retired members are eligible for CTA Disaster Relief Funds. Go to [www.CTAMemberBenefits.org/drif](https://www.CTAMemberBenefits.org/drif) for Relief Fund information and application forms.**

# THE FIRST CTA/NEA-RETIRED GLORIA PEDRETTI SCHOLARSHIPS ARE AWARDED

By KC Walsh, Former CTA/NEA-Retired Secretary-Treasurer

The new Gloria Pedretti scholarships are made possible because of a generous endowment from a CTA/NEA-Retired member and are awarded to students in Elementary or Secondary credentialing programs. This year's recipients are Angel Aldana, Brenda Quispe and Paul Bansen.



Angel Aldana is currently a senior at CSU Channel Islands attending the Integrated Teacher Education Program. He intends to pursue both a Master's Degree and a Doctorate of Education. He aspires to work at the state or federal level to advocate for diversity and social justice in the educational system. Angel stated, "My personal experiences are why I aspire to inspire my future students to see themselves reflected in me, to pursue higher education, and to remind them that their lives are not defined by the neighborhoods or communities they live in."

Angel's activities include belonging to Tomorrow's Teachers, a Student CTA chapter, and membership with I.D.E.A.S. which promotes awareness of undocumented students and immigrants. Angel is also a member of the California Community College Scholarship Honor Society and volunteers with the 40 Prado Homeless Services Center and Schools on Wheels, providing tutoring and mentoring to K-12 students in shelters, motels, group and foster homes. One supervisor noted that "He is able to effectively communicate important information in all mediums . . . during these times of uncertainty in the field of education we need new and promising educators who will take charge of instructing our future students."

Brenda Quispe plans to finish her multiple subject credential and begin a Master's program at Fresno Pacific University. She would like to work as a bilingual kindergarten teacher and has been motivated in that goal by doing volunteer work at an elementary school.

Brenda cofounded the Student CTA Chapter at Fresno Pacific, was awarded a Student CTA WHO Award for 2022, works as the social media chair of the Fresno/Madera Service Center Council, and has served as a Student CTA State Council representative. Other volunteer activities include: Junior Achievement, Central Woman's Conference, and California for New Communities. Brenda's letter of recommendation shared, "There is no doubt in my mind that she will be a strong education leader as she enters the teaching world. Brenda has overcome many obstacles in her journey to become an educator and will certainly benefit from the scholarship."



Paul Bansen is attending CSU Stanislaus completing his concurrent multiple subjects and education specialist credentials. He says he decided to pursue teaching after realizing that other pursuits did not satisfy his desire to care for his community. He tried substitute teaching and found his sense of purpose. Paul is an active Student CTA member, has been a delegate to the NEA Representative Assembly, and has served on the Student CTA Statewide Board as a social justice advocate, the CTA Statewide Higher Education Service Center Equity Team, and the Student CTA Ethnic Studies Workgroup. Paul is also a member of CTA DivesT and works as the online publication editor for California Educators United.

In Paul's recommendation letter, the writer states, "these experiences have made him passionate about supporting students with disabilities to achieve their highest potential . . . Paul is a strong believer in social justice and intends to teach his future students to . . . engage in democratic governance and decision making . . ."

The 2022-2023 Scholarship Committee included Ed Foglia, Shelley Krantz, Orval Garrison, Mary Rose Ortega and KC Walsh.

## DID YOU KNOW?

CTA had 22 members (including several CTA Retired members) running for Assembly, School Board, Community College Trustee or County Board of Education in the November 2022 election. They all won! One CTA member, Dawn Addis, will be the next Assemblymember for AD 30. Have you considered running for office?



## THREE CTA/NEA-RETIRED MEMBERS SHARE WHY THEY RAN FOR SCHOOL BOARD HAVE YOU CONSIDERED IT?

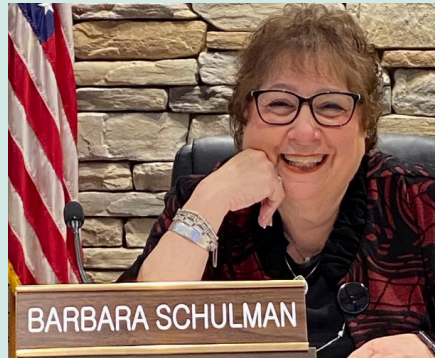


"In 2021, when my wife Carolyn and I retired to the beauty and peace of Nevada County we didn't know the school district was in turmoil. Students in the Nevada Union High School District had been pleading with their school board to make the schools safe for kids of color and LGBTQ+ students. Parents, concerned for the physical and emotional safety of their children, had been pulling their kids out of the district. In May of 2022, the school board rejected the students' proposed anti-bullying policies, objecting to the inclusion of consequences for racist and homophobic bullying.

"That's when I decided I would agree to run for the school board. What kind of person ignores kids when they're crying out for help? I've always felt the group that is most affected by school board policies, but has the least input, are the students. I proposed a Student Town Hall to listen to the concerns of the students firsthand. Over fifty students showed up for the Town Hall and shared their stories.

"One advantage you'll have when you file for office is instant credibility. My candidate statement listed my occupation as Classroom Teacher. We always think the public doesn't support educators, but that's not true. The silent majority supports us. When people told me, "Hey I voted for you," I'd ask why. They always replied, "It's because you were a classroom teacher. You know what the kids need." **That is why it is so important for retired educators to run for school board!"**

*Ken Johnson, Nevada Joint Union High School District*



"I believe the reason that retired teachers should consider running for School Board is because the knowledge we have of how administration works, how teachers work, how students learn, and where money should be spent is knowledge that many School Boards do not have. I also personally believe the School Board should be made up of lots of different people coming from many areas of caring for students, because having different opinions and viewpoints is very important to doing what is right in a school district.

"I go to at least one school every week and walk into every class to see what is happening. I think the job is more than deciding where money should be spent. It's seeing children using the new math curriculum, watching a dress rehearsal of a play, asking students questions and thanking every teacher."

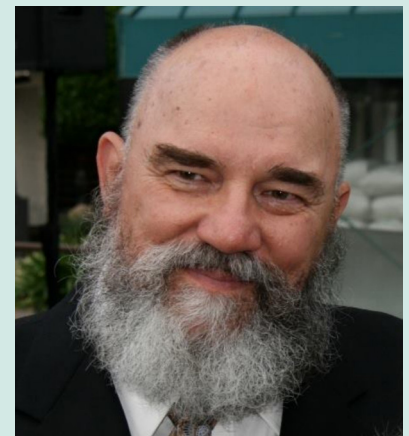
*Barbara Schulman, Saddleback Unified School District*

"When asked to run for our school board I couldn't say no; service seems to be in my DNA. I was elected in 2018 and re-elected in 2022. When I was first elected the culture in our District was to pay them as little as possible. My first order of business was to change that idea. I convinced the

other board members to recruit and retain the best and brightest we'd have to increase our teachers' salaries. That attitude has become our new credo. Stop paying for programs, consultants and "stuff" and let our teachers do what they already know how to do.

"In October of 2021 our Board meetings were invaded by the extreme right demanding that we, the Board, refuse to comply with state mandates as well as fire our LGBTQ+ teachers, among other things. I won by a 65% to 35% margin, demonstrating they do not represent the majority of voters.

"Those who have been in the trenches and are now retired can have a lot of influence on the board with their vast knowledge of how schools work. You don't have to be an accountant nor a budget expert. You just have to know what is right and wrong and where to prioritize the money. You can't have schools without students and teachers. That's where we should spend first. Retirees can make a big difference. We need you."



*Larry Allen, President, Middletown USD Board of Trustees*



The California School Boards Association met in San Diego the first week of December and CTA/NEA-Retired members who are also elected school board members participated.

Pictured from left are Jose Berrios, Sharon Vega, Brian Wheatley, Tina Gurney, Don Bridge, Larry Allen, Barbara Schulman, Simone Zulu Diol, Rhodia Shead and Ken Johnson.



REGISTRATION OPENS SOON  
[www.cta.org/conferences](http://www.cta.org/conferences)

## CTA/NEA-RETIRED ISSUES CONFERENCE:

March 16-17, 2023  
Marriott, Santa Clara

Come join us for the 18th Annual CTA/NEA-Retired Issues Conference! You don't have to be retired to attend. If you are retired or are considering retirement in the next few years you will benefit from the information offered by speakers and workshops on a variety of issues.

Attend this conference to learn how you can  
**stay connected, be protected & enjoy great benefits**

### Plan to Attend Sessions to...

- Find out about local CTA/NEA-Retired chapters & events in your area
- Get involved in our Lobbying Network
- Make Sense of CalSTRS and Public Employee Pensions
- Negotiate the Healthcare Maze - Medicare & the Affordable Care Act
- Be Updated on NEA's Advocacy for Federal Retirement Security  
(Protecting Social Security & Repealing GPOIWEF)
- Discover the CTA/NEA Member Benefits including many savings available to you!
- Learn about Staying Healthy and Active in Retirement

***SPEAKERS AND PRESENTERS to inform and inspire!***

***Reception Thursday Evening, March 16***

***Come and meet other participants and have some great snacks!***

**Registration cost is \$125.00**

*(Thurs. evening reception, Fri. breakfast and lunch are included as part of your registration).*

**Hotel Group Rate: \$144+tax/night for single or double**

***Hotel Cut Off: March 2, 2022 (or until rooms sell out)***





High Desert CTA/NEA-Retired held its Holiday Luncheon this year and again collected items for the homeless. Eleven large bags filled with socks, gloves, hats, coats, blankets and other cold weather items were taken to the Victor Valley Rescue Mission. At the Rescue Mission, the members met shelter manager Bill Edwards. He thanked the group not only for the donations and check, but for the work they have done and continue to do as educators. Edwards stated, "You don't realize what a difference you make." He continued to praise educators stating that they helped him turn his life around to become the person he is now. He uses his experiences to help those on the streets struggling with addiction and isolation. Pictured loading bags of donations are President Ken Kerr, Past President Ned Curtis, Jim Pace and Antonia Vignocchi.

## PRESIDENT'S PERSPECTIVE continued from page 1

Now, an issue that we in CTA/NEA-Retired are dealing with is retirees being lured back to work by districts desperate for substitutes. The temporary suspension of the 180-day return-to-work rule is over with the governor's suspension of that rule ending last spring. If a retiree returns to CalSTRS-covered work too early before the 180-day "break in service" is ended, one will be working for free. The pension will be deducted, day for day. There is a way that one may return early before the break-in-service period is up, but the school district must do it correctly. Make sure the district knows what it is doing—Board action with stated need, named person, no return to a position left.

And now, allow me to express a plea. CTA/NEA-Retired is the only organization that agrees to work with members who are having CalSTRS pension issues! If you are a CTA/NEA-Retired member, and you end up in a dispute with CalSTRS, let us

know about it sooner rather than later. If one goes through all CalSTRS appeals including an Administrative Law Judge decision, there is not much we can do after the fact.

Finishing on a happier note, I want to thank all members who wrote postcards, emailed, did phone banking, or otherwise advocated for pro-education candidates & issues in the 2022 election cycle. Our efforts can and do make a difference.

I am looking forward to the coming NEA-Retired Conference in San Francisco in March and to our CTA/NEA-Retired Annual Issues Conference, March 16-17, 2023 in Santa Clara, CA. Getting back to "normal" after the challenges of a worldwide pandemic has been a slow but gradually improving process. Our local retired chapters are meeting again, having field trips and outings, and trying to provide enriching opportunities for our members. The very best to all in this New Year!

## BOARD REPORT

continued from page 2

8) **CTA Staff Consultant Brian Stafford** talked about the upcoming November election.

9) **NEA-Retired Board member Ed Foglia** thanked CTA/NEA-Retired members who worked to help him get elected to the NEA-Retired Board. He talked about Social Security increases and Medicare rates/ Advantage plans. Ed said that the GPO/WEP legislation has enough co-sponsors and is moving toward a mandatory vote.

10) **Information Items:** The next Board Meeting will be held Friday, March 24, 2023, at the Westin Bonaventure Hotel in Los Angeles. Like us on Facebook: [www.facebook.com/ctanearetired](https://www.facebook.com/ctanearetired) (No "membership" in Facebook required).

**Donations are always gratefully accepted for the Russo Scholarships.**

**Please make checks out to the CTA Foundation for Teaching and Learning with the following notation: Russo Memorial Scholarship Fund in the memo line of your check. Checks should be mailed to: Debra Sheehan 3045 Capitola Rd. Apt. 17, Santa Cruz CA 95062.**



# Retiree Advocate

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## NOMINATIONS ARE OPEN 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 March 16-17, 2023.

Past winners of the award are:

- 2022 - John Graham
- 2021 - Ed Foglia
- 2020 - Marc Sternberger
- 2019 - Jim Burfeind
- 2018 - Bob McDonough
- 2017 - Frank Tarantino
- 2016 - Arlene Pavey
- 2015 - Bonnie Shatun
- 2014 - Val Muchowski
- 2013 - Orval Garrison
- 2012 - Tim Jenkins

Nomination forms can be found online at [www.cta.org/retired](http://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](mailto:CTA-Retired@cta.org). Deadline for submission is Friday, February 17, 2023.