

Retiree Advocate



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NOTES FROM THE PRESIDENT

Recently, I've had a number of members ask me what the official position of CTA/NEA-Retired is on HR 711 (Brady), the Social Security Act to replace the current windfall elimination provision (WEP). Since the lobbyists who work our bills are part of CTA and NEA staff, we almost always support CTA and NEA positions, and the NEA position on this bill is technically neutral at this moment. However, both NEA and Harry Keiley, former Chair of the CalSTRS Board, have written letters to the House Committee on Ways and Means expressing concerns about HR 711, and many CTA/NEA-Retired and NEA-Retired leaders are opposed to the bill for the following reasons:

1. The bill doesn't address the far more onerous Government Pension Offset (GPO) which deprives almost all of our members their spousal Social Security benefits after the death of their spouses.
2. It doesn't change the Windfall Elimination Provision (WEP) for most of us who are already retired.
3. While it does reduce the WEP for some, it hurts others, including those with 30 years of creditable Social Security compensation and those who paid into a public pension, but were never vested.
4. The bill would only partially reduce the WEP, but would almost certainly lead to the next point.
5. Many legislators would say, "We took care of you, now go away."

This bill seems to be the perfect example of "Be careful what you ask for. You may get it." We would be far better served by the passage of HR 973/S. 1651 which would totally repeal the offsets. HR 973/S. 1651 is the bill that NEA supports!

On February 17th, 40,000 parents, students and educators "walked-in" to more than 800 schools in 30 cities, mobilizing against cutbacks, over-testing and privatization. More successful "walk-in" events were held across the country on May 4. For information, go to www.ReclaimOurSchools.org, or contact your local CTA chapter for ways in which you can get involved.



Alen Ritchie
PRESIDENT
CTA/NEA-Retired

UNIONS ARE BEING ATTACKED THROUGH THE COURTS

By Ed Foglia, District 2 Director

For decades, conservatives have been determined to roll back workers' rights. Laws have been passed in red states, and Right-to-Work legislation and similar measures have denied workers the right to collective bargaining. States have dismantled both public and private sector Defined Benefit pension systems for less costly Defined Contributions retirement plans.

In California, we have fought hard to protect our rights and our pensions. That has not discouraged our critics from attacking us through ballot measures, legislation and executive actions. However, by working together, public sector unions have successfully thwarted their efforts.

"Anti-union and anti-public education forces have now turned to the courts to get what they have not been able to achieve at the ballot box."

Anti-union and anti-public education forces have now turned to the courts to get what they have not been able to achieve at the ballot box. They know that on other issues throughout our country, there has been success in turning back the clock on union, voter and civil rights issues through the courts. The U.S. Supreme Court had a five-to-four conservative majority that would uphold their cases.

That all changed with the passing of Supreme Court Justice Antonin Scalia. This was a substantial blow to a critical case, *Friedrichs v. California Teachers Association*. If the lower court's decision had been reversed, non-union employees would no longer have to pay their fair share cost of union representation in collective bargaining agreements with school districts (also known as agency fee). With the new composition of the U.S. Supreme Court being a four-to-four split, the court let stand the Appeals Court ruling to uphold four decades of legal decisions that have protected the rights of public employees and their unions.

In the case of *Vergara v. State of California*, California statutes governing due process in teacher layoffs and dismissals were challenged. The plaintiffs were supported by corporate "education reformers" who want to privatize public education and abolish public sector unions. They would like you to believe that experienced teachers are ineffective. If they prevailed, teachers with years of experience and expertise could be the first to go in a layoff situation.

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BOARD OF DIRECTORS

President

Alen Ritchie
938 Nottingham Drive
Redlands, CA 92373
Home: 909-793-9229
Email: alenritchie@verizon.net

Vice President

Marc Sternberger
3015 Mayhew Court
Walnut Creek, CA 94597
Home: 925-937-1824
Cell: 925-323-3631
Email: marcpea@aol.com

Secretary-Treasurer

Frank Tarantino
1480 Edgehill Drive
Chula Vista, CA 91913-2982
Cell: 619-985-5508
Email: fatarantino@cox.net

District 1 Director & State Council Rep

Gretchen Lipow
2242 San Antonio Avenue
Alameda, CA 94501
Home: 510-846-5465
Cell: 510-814-9592
Email: gretchenlipow@comcast.net

District 2 Director & State Council Rep

Ed Foglia
201 Ravenwood Court
Granite Bay, CA 95746
Email: edndonna@surewest.net

District 3 Director & State Council Rep

Bonnie Shatun
4043 Pacheco Drive
Sherman Oaks, CA 91403
Email: bshatun@aol.com

District 4 Director & State Council Rep

Sharon Fitch Boudreau
292 Palmer Street, C-2
Costa Mesa, CA 92627
Home: 949-646-8606
Email: sharbou@aol.com

Ethnic Minority At-Large Director

Harris Kight-Moore
P.O. Box 1952
Idyllwild, CA 92549-1952
Home: 951-659-0196
Cell: 951-288-8022
Email: metalinefalls1@yahoo.com

EDITOR

Bonnie Shatun
Email: bshatun@aol.com

PHOTOGRAPHS

Retired Members

BOARD REPORT

By Frank Tarantino, Secretary-Treasurer

CTA/NEA-Retired Board of Directors
Meeting - April 8, 2016

Reports:

The California Children's Education and Health Care Protection Act of 2016

April 22, 2016 is the deadline for collection of signatures to have this initiative put on the November ballot. Membership is encouraged to collect as many signatures as possible before the deadline. Petitions are available at all CTA offices.

Matters Pending:

- Review of CTA/NEA-Retired Chapter membership lists.
- Resolution of Bylaw discrepancy regarding membership in CTA/NEA-Retired between CTA Bylaws and those of CTA/NEA-Retired.

Information Items:

- The CTA/NEA-Retired Board of Directors and CTA consultants continue to meet with Student CTA members to explore ways to work together and support each other.
- Like us on Facebook: www.facebook.com/ctanearetired ("Membership" in Facebook is NOT required).
- Dana Dillon is once again Chair of the CalSTRS Board; Harry Keiley has stepped down as Chair, but is retaining his position on the Board.
- Samantha DeMuro, Communications Consultant/ Digital Editor at CTA, is available to local CTA/NEA-Retired chapters for trainings on Facebook. She can be reached at sdemuro@cta.org for more information.



ARLENE PAVEY RECEIVES THE 2015-2016 ELLEN LOGUE OUTSTANDING RETIRED EDUCATOR "WHO" AWARD

By Marc Sternberger, President-Elect

When the recipient of this year's WHO Award was announced at the CTA/NEA-Retired Issues Conference, there were few attendees who did not recognize the winner's name immediately. The name Arlene Pavey has been synonymous with CTA/NEA-Retired for nearly two decades. She helped found the organization and served two terms as President from 2004 through 2008.

During Arlene's presidency, 14 local chapters were established statewide and membership grew by 5,000 members. The Ethnic Minority At-Large Board position, the Liaison Program and the Annual CTA/NEA-Retired Board Summer Planning Meeting were also created under her leadership. NEA grants for membership recruitment and new chapter development were first applied for and received, yearly goals were created and adopted, and annual reports by the Retired President to the CTA Board of Directors were initiated.

After serving as President, Arlene was our Secretary-Treasurer for two years, and is

currently the Chair of the Bylaws Committee where she reviews and helps chapters write and revise their documents. She also continues to help CTA/NEA-Retired successfully apply for NEA Grants.

Arlene keeps up on national issues by regularly participating in the Annual NEA-Retired Organizing Conference which she attends at her own expense. She has been a consistently outspoken advocate for CTA and NEA retired members as an elected delegate to the NEA-Retired Annual Meeting and the NEA Representative Assembly every year since her retirement.

Before her retirement and activism in CTA/NEA-Retired, Arlene helped establish NEA's National Council of Urban Education Associations (NCUEA) and served in numerous leadership positions at all levels of the Association.

CONGRATULATIONS ARLENE PAVEY!

RETIREMENT COMMITTEE REPORT

By Gretchen Lipow, Region 1 Director

The Retirement Committee held its usual meeting at State Council on April 9. A major item of discussion was the importance of Defined Benefit programs such as CalSTRS and CalPERS for retirement security. The committee reaffirmed that voluntary defined contribution savings plans are recommended to supplement, but not replace Defined Benefit programs.

The committee also discussed the impact of the teacher shortage and the difficulty in hiring qualified substitutes. Current law requires that newly retired educators have a 180-day separation from service before working again in a school district. However, school districts can apply for an exemption if the CalSTRS member is being hired for a critically needed position and meets other eligibility criteria. Specifics for the waiver can be found at http://www.calstrs.com/sites/main/files/file-attachments/eicvol32-issue3_separation-from-service.pdf.

More items of interest:

- CalSTRS is very easy to access. The usual pathway is www.mycalstrs.com or the phone number is (800) 228-5453. Other informative websites include: www.cta.org, www.leginfo.ca.gov, www.calpers.ca.gov, www.nea.org, www.ssfairness.com, and www.letstalkpensions.com.
- CalSTRS Annual Progress Reports are only delivered electronically via www.mycalstrs.com. If you haven't already, please sign up and create your account or contact CalSTRS directly for assistance.
- **WARNING:** It has been reported that there are individuals going to the homes of, and/or calling CalSTRS and CalPERS members under the guise of representing either pension organization. These individuals are attempting to either change their plan information, solicit personal information or sell products. **CalSTRS, CalPERS AND THE IRS WILL NEVER VISIT OR CALL INDIVIDUALS TO SOLICIT PERSONAL INFORMATION.**

UNIONS ARE BEING ATTACKED THROUGH THE COURTS

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Let us not kid ourselves, this would be a big cost savings for school districts.

The lower court's decision was unfavorable, however, CTA appealed it and it was heard before the California Court of Appeals in February. On April 14, the California Court of Appeals unanimously struck down the lower court's unfavorable decision and upheld due process protections for California teachers. There will no doubt be more attacks on teacher rights which is why appointments to the U.S. Supreme Court are so important.

CTA/NEA-RETIRED ANNUAL MEETING

The Annual Meeting for CTA/NEA-Retired is scheduled on June 3, 2016 at 3:00pm at the Westin Bonaventure Hotel in Los Angeles (probably in the Santa Anita Room). All members are invited to attend. You are also invited to attend the Board Meeting which precedes it and will start in the same room at 1:15pm.



Members of the Delta Retired chapter boarded an Amtrak train to San Francisco for a fun-filled day visiting the annual Tulip Festival. Their guide, Giovanna, a very knowledgeable gardener, shared information about the different varieties of tulips planted for the festival. Before boarding the train for the trip back, they enjoyed lunch at a Pier 39 restaurant.

CTA/NEA-RETIRED ELECTION RESULTS

Elections for CTA/NEA-Retired Officers, State Council Alternates and Retired Delegates to the NEA Representative Assembly (RA) were recently held by mail and the ballots were counted on March 21-22. Congratulations to the following winners:

CTA/NEA-Retired Officers

President-Elect Marc Sternberger, Vice President-Elect Orval Garrison, Secretary/Treasurer-Elect KC Walsh

The Officers will hold office from June 26, 2016 to June 25, 2018.

CTA/NEA-Retired State Council Alternates

Region 1 - Val Muchowski, Lisa Gutierrez Guzmán
Region 2 - Anna Poggi, Sandi Boone
Region 3 - Barbara Ferges, Shelley Krantz
Region 4 - Kaisar Ahmed, Joyce Singer Abrams

The State Council Alternates will hold office from June 26, 2016 to June 25, 2019.

CTA/NEA-Retired NEA RA Delegates

Marilyn Russell Bittle, Sharon Fitch Boudreau, Tony Diaz, Ed Foglia, Lois Hale, Danny Howerton, James Moore, Val Muchowski, Mary Rose Ortega, Arlene Pavey, Anna Poggi, Alen Ritchie, Bonnie Shatun, Marc Sternberger, Loretta Toggenburger, KC Walsh and Lynda Wong

The NEA RA Delegates attend the NEA-Retired Annual Meeting on June 29 - 30 and then participate in the NEA RA from July 2 - 7 in Washington, DC.

STAYING CONNECTED: THE 2016 CTA/NEA-RETIRED ISSUES CONFERENCE

By Orval Garrison, Vice President-Elect

At the 2016 CTA/NEA-Retired Issues Conference in Torrance on March 3-4, attendees learned about travel, personal security, updates on Member Benefits, social media, politics and pensions, HICAP and Medicare, tax fairness and more from a cadre of expert presenters. Current information, not a rehash of old topics, is what made these presentations so engaging as well as time for Q & A.

The conference also heard speakers such as CTA President Eric C. Heins, CalSTRS CEO Jack Ehnes and NEA Government Relations Director Mary Kusler. They spoke about

work at least 20 years. Ms. Kusler praised retiree members for their committed lobbying that helped pass the ESSA and bring flawed NCLB to an end. Every email, letter and phone call made a difference!

One sobering highlight of the conference was the opportunity to view the Richard Reich film, "Inequality for All", which exposes how the country's widening economic gap has had a devastating impact on the American economy. The film reveals in detail the contraction of the middle class and the concentration of wealth for the top 1%.

"Mr. Ehnes gave information dispelling the myth of fiscal instability for Defined Benefit pensions and reinforcing the fact that most California educators do make teaching a lifelong career."

current issues facing the education community and retirees. These issues included pending court decisions, retiree involvement in the political arena, ESSA (Every Student Succeeds Act) enactment, pension security, and Congressional resistance to fixing tax unfairness and WEP/GPO penalties.

President Heins shared early teaching experiences that had motivated him to enter education as a profession, triggering remembrances among retirees who had their own motivations. Mr. Ehnes gave information dispelling the myth of fiscal instability for Defined Benefit pensions and reinforcing the fact that most California educators do make teaching a lifelong career. Three-fourths of classroom teaching is performed by long-term teachers, and 75% of educators will

A plus this year was the ability to use the CTA Go! App to access materials provided by session presenters. Some of the presentations are also available on our website at cta.org/retired. Indeed, this conference was a success. Members also signed petitions for the Children's Education and Health Care Protection Act of 2016, contributed \$2,145 to the NEA Fund and over \$500 for the Sharilynn Gardella Russo Scholarship Fund, and learned how they could help build a stronger CTA/NEA-Retired. At the conclusion of the conference, President Alen Ritchie announced the winner of the Board's first competition for membership building. Congratulations to Northbay Retired out of the Redwood Service Center Council area!

CTA/NEA-RETIRED ISSUES CONFERENCE



At our CTA/NEA-Retired Issues Conference, Mary Kusler, Director of the NEA Government Relations Department spoke about Federal Issues including NEA's efforts to end the unfair Social Security Offsets (GPO/WEP) and to protect Medicare.



At a break-out session at our Issues Conference, CTA/NEA-Retired Board Member Ed Foglia shared information about the "pilot" intergenerational mentoring program at UC Davis which is co-sponsored by CTA/NEA-Retired and Student CTA.



At the 2016 CTA/NEA-Retired Issues Conference, local Chapter Presidents and Membership Coordinators received training on Using Social Media for Advocacy and Engagement which is aligned with our goal - improving communications with our members and members of CTA. The trainer, Samantha "Sam" DeMuro from the CTA Communications Department, is also available to train local chapters.



For the third year, Northbay Retired helped to spread the joy of reading by working with local public school teachers to coordinate events for Read Across America. Twenty-eight volunteers read at five different sites, in 62 classes and in two districts. Volunteers included 13 CTA/NEA Northbay retirees, eight elected officials or their representatives, and seven community members. Pictured on the left is Northbay member Jill Humrich reading to a Kindergarten class. The center picture is Principal Maureen Grafeld, Northbay members Christine Minhondo, Pam Dowd and Pat Sabo, Santa Rosa City Councilwoman Julie Combs, and Ed Sheffield representing Assembly Member Jim Wood. The picture on the right shows Northbay member Claire Connor reading to a Fourth Grade class in Healdsburg.

SAN DIEGO WELCOMES THE NEA-RETIRED ORGANIZING CONFERENCE

By Sharon Fitch Boudreau, District 4 Director

Unite, Inspire, Lead: Still Doing It! was the theme for the 2016 NEA-Retired Conference. CTA/NEA-Retired President Alen Ritchie graciously welcomed over 225 retired education employees to an opportunity to hone their skills in organizing. The well-developed program revolved around the six Leadership Competencies: Business, Advocacy, Communication, Leading Our Profession, Organizing, and Governance and Leadership. Each breakout session focused on one of these competencies and was very well presented. Dynamic speakers shared insight, inspiration, information and humor with the participants in the general meetings.

Harry Keiley, our own CTA member and now former Chairperson of the CalSTRS Board, opened the conference. Harry has been an elected teacher member of the Board since 2007. He shared that CalSTRS, with more than \$189 billion in assets and more than 800,000 active and retired educators, is the largest teacher pension fund in the world. Current assets are allocated across multiple strategies, including global equities, fixed income, private equity, real estate and absolute returns. Harry also shared his depth of understanding of the intricacies and importance of Defined Benefit programs with the attendees. He also spoke about how important the strength and influence of CTA and CTA/NEA-Retired have been in solving the CalSTRS unfunded liability problem through legislation.

Dr. Linda Sasser, a Ph.D. in Educational Psychology, presented

important facts about the brain and how to understand the differences between everyday forgetfulness, mild cognitive impairment and dementia. Dr. Sasser shared tips on how to maintain and enhance our memories. One way which can be especially helpful in remembering names was Pave Your Way to a Better Memory:

- P - Pay attention, focus and concentrate
- A - Associate, connect to things known
- V - Visualize, form mental images
- E - Elaborate, connect to the familiar or form an acronym

She also spoke about the importance of socialization, physical activity, nutrition, sleep, spirituality and cognitive stimulation are to having a good memory and brain function. More information is available in her books and on her website at www.brainandmemoryhealth.com.

We are especially proud of the outstanding workshops put on by our CTA and CTA/NEA-Retired members. Linda Plack and Elaine Merriweather from United Educators of San Francisco presented a workshop on organizing and keeping retirees involved with their active local chapter around educational issues. Northbay CTA/NEA-Retired members, Sheila Bell and Orval Garrison, shared how they revitalized a local chapter of 10 members to a chapter of 100.

Consider putting the NEA-Retired Organizing Conference on your calendar for next year.

THE ELEPHANT IN THE ROOM

By Harris Kight-Moore, Ethnic Minority At-Large Director

Over a dozen of our Retired members and Board members participated in CTA's Equity and Human Rights Conference March 4-6 in Torrance. We confronted our own communities' Elephant in the Room such as white privilege, unconscious bias, gender discrimination, Black Lives Matter and income inequality to name a few. Dynamic and participatory workshops taught us successful strategies to create community change.

Watching student performances is always a highlight of this conference. This year was no exception. Students from Sweetwater High School in National City, CA performed through dance and poetry, an original presentation written by their Theater Arts teacher, Ben

Cassel. It was based on his students' own stories and their personal experiences with injustice.

Gyasi Ross, a Columbia Law School graduate from the Blackfeet Nation, keynoted our experience with his stories about promoting racial equity, raising outside awareness of the importance of Native American communities, and putting a face upon all victims of unfair treatment and lack of opportunities.

We look forward to next year's CTA Conference at the Fairmont San Jose on March 3-5, 2017, as we strive this year to implement what one workshop described as "change from the ground level." ¡Sí, se puede!



Retiree Advocate

California Teachers Association
1705 Murchison Drive, Burlingame, CA 94010

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CARA PLANS LOBBY DAYS

By Pat Ryan, CARA Representative

As members of CTA/NEA-Retired, we are also members of the California Alliance for Retired Americans. Did you know that May is "Celebrate Older Americans Month?" CARA is celebrating by joining seniors from around the state in Sacramento on May 11 to tell our elected officials that the time is NOW to increase resources and services for older adults. The day will begin with a celebration on the North Steps of the Capitol starting at 10:30am followed by lunch and then visits with legislators. RSVP to CARA by calling the toll free number (877) 223-6107.

CARA is also sponsoring an "In the District Statewide Lobby Day" on Friday, May 20. On that day, CARA members are invited to meet with their State Assembly Member and Senator from their local district office to talk about our priority bills and urge their support. For information on how to participate and to be put in contact with your area coordinator, contact CARA at (877) 223-6107



At the United Teacher Los Angeles - Retired General Assembly in March, more than 100 retired members enjoyed a presentation by the Los Angeles Fire Department on fire safety, smoke alarms, and emergency preparedness. Each participant was given a free smoke alarm. The program was arranged by UTLA-Retired member Jimmie Woods-Gray (second from the left) who is a member of the Los Angeles Board of Fire Commissioners. Members also signed petitions to qualify the Children's Education and Health Care Protection Act of 2016.