PRESIDENT’S PERSPECTIVE

Thanks to the many people who made our 15th Annual CTA/NEA-Retired Issues Conference a great success. I wish all of our members could have heard from and interacted with our outstanding speakers and presenters. Special Thanks to our Conference Planning Committee: Misou Brown, Debra Sheehan, Daly Jordan Koch, Phyllis Grenier, KC Walsh, Gretchen Lipow, Ed Foglia; Staff Consultant: Gerry Fong and the CTA Conference Center staff. There is an article by Board Member/Editor Bonnie Shatun later in this issue with more details about the sessions and speakers; however, I’d like to let you know some of the subjects covered in our General Membership Meeting held at the conclusion of our conference.

The proposed “Partner Membership” Bylaw Amendment (printed in this issue) will be voted on by members attending the next Annual Business Meeting in Los Angeles on May 31. This Bylaw addition, if approved, would allow NEA-Retired Life Members, who have come to California after retiring from another NEA State Affiliate, to become members of CTA/NEA-Retired under a new category of “Partner Member.” NEA encourages its Retired Members to stay involved with the Association no matter which state they have settled in after retirement. This change, already approved by NEA and the CTA Board of Directors, will give “membership status” to those who wish to be involved with their CTA retired colleagues.

The 2018-19 NEA Grant for the New Teacher Mentoring Program guidelines have been “tweaked” to encourage more members to get involved and especially to take on the role of “Local Program Coordinator.” We’re now offering a stipend, in addition to reimbursement for travel, postage, etc., to those members willing to commit some time to matching up retired mentors (aka: experienced advisors) and new educators and making sure the program gets going. If you or someone you know may be interested please contact your Local Retired President, CTA/NEA-Board Member, or me.

It was announced in the meeting that two “Social Security Fairness” bills have been introduced in the new Congress to eliminate the GPO/WEP “Social Security Offset Laws.” There are more details about the negative impact these laws have on millions of retirees found later in this edition. Please urge your U.S. Senators and House Representative to co-sponsor and support passage of H.R. 141 (Davis, R-IL) and S.521 (Brown, D-OH) these bills!

“Elections matter” as our new governor, Gavin Newsom, has proposed a budget that not only increases funding for education, but adds billions into our CalSTRS Pension Funds over the next 10 years. This will help close the “unfunded liability” gap and relieve some of the pressure on school districts faced with rising contributions. This, in turn, frees up money for salaries, benefits, class size reduction, etc. CTA/NEA-Retired plans to be in Sacramento in late May when it’s time to lobby for these proposals with our legislators. Our new Superintendent of Public Instruction, Tony Thurmond, has hit the ground running too. Our new Superintendent of Public Instruction, Tony Thurmond, has hit the ground running too. CTA/NEA-Retired plans to be in Sacramento in late May when it’s time to lobby for these proposals with our legislators. Our new Superintendent of Public Instruction, Tony Thurmond, has hit the ground running too. Our new Superintendent of Public Instruction, Tony Thurmond, has hit the ground running too.

By Ed Foglia, District 2 Director

Fires Rage: CTA and CTA-Retired Are Ready to Help

It was a dry autumn day in November when the worst firestorm in California history hit Butte County. The hot dry winds combined with a highly combustible fuel load from the years of drought conditions and created the world’s worst natural disaster in 2018. It is estimated that 52,000 people had to be evacuated. Traffic jams led to cars being abandoned while people, fighting the flames, evacuated on foot. Others died when the fire overtook them as they were trapped in their vehicles. Many seniors were evacuated by passersby and neighbors. As the fire approached, quick thinking educators took action and, using their personal vehicles, hurried to drive students off the hill to safety.

Among the 386 CTA members impacted by the Camp Fire was Lisa Avila. Lisa, a newly retired CTA/NEA-R member, was subbing at Los Plumas High in Orville when she got the word that a terrible fire was happening in her hometown of Paradise. She immediately returned to Paradise. After going to her colleagues’ home to rescue her friend’s horses, she arrived at her home to see the fire closing in very quickly. There was barely enough time to save her 2 cats, 4 chickens and dog. With their house on fire, both she and her partner escaped in their pickup and travel trailer.

The fire was raging in every direction with traffic jams blocking their way to...
BOARD REPORT

By KC Walsh, Secretary-Treasurer

CTA/NEA-Retired Board of Directors
Meeting - January 25, 2019

Action Items:
• Pending Board Approval (via email and phone), proposed bylaw changes will be sent to the membership in the March ADVOCATE. They will be voted on at the May 31 General Membership Meeting.

Reports:
• Letters have been sent to universities with speech/language programs about the CTA/NEA-Retired Scholarship in honor of Sharylyn Russo. We are working on increasing fundraising activities.
• The Membership Development Committee has been meeting and working on membership issues and next steps to move our organization forward. The next meeting is March 4 in Sacramento.
• Officers and Board members completed regional leadership trainings with the last meeting in Bakersfield. At the Bakersfield meeting, Officers, along with Sheila Bell, Gerry Fong and Board Member Ed Foglia, met with local leaders. This meeting went well and the local leadership seemed poised to proceed.
• Bonnie Shatun reported that CTA/NEA-R is receiving recognition for all our hard work in the election. She was very pleased that the Thurmond campaign reached out to us to help observe ballot counting in county registrars’ offices throughout the state. Many of our members participated.
• Both Mary Rose Ortega and Bonnie Shatun informed us that retirees’ support for the UTLA strike was phenomenal and very much appreciated. Retirees “adopted” school sites and provided support and supplies. UTLA-R retirees wore their t-shirts on the strike line.
• Ed Foglia noted that the work of the Chico chapter was outstanding in aiding the members impacted by the Paradise “Camp” fire.
• Alen Ritchie, NEA-Retired Executive Council, reported on H.R. 141, the Social Security Act of 2019, (Davis - R-IL), to repeal the GPO/WEP “Social Security Offset.” There are only 70 co-sponsors so far. Thirteen are from CA.
• Gerry Fong, CTA Staff, let us know that our new support staff, Jordan Schultz, is on board in the Sacramento CTA office.
• Dana Dillon, described an effort called “Trustees United.” This group has been formed by labor union pension trustees and is working on alleviating issues of employees being sexually harassed. There is a tendency for corporations to sweep these problems under the rug. The group feels a fiduciary responsibility to mitigate potential risks to investment portfolios.
• Ed Foglia thanked Dana for her leadership and mentorship and congratulated her on her upcoming retirement. Denise Bradford, current chair of CTA’s Retirement Committee, was elected and Harry Keiley was re-elected to the CalSTRS Board. Good News!
• Jennifer Baker, CTA Governmental Relations staff, shared new budget proposals from Governor Newsom. There is a plan to reduce District employee contributions by 1% in 2019-20, 1% in 2020-21 and an additional ½% until 2046, saving $6 billion for Districts. Rainy day funds will be used to achieve this goal. The private pension divestment is a controversial issue. Jennifer recommended that if CalSTRS moves forward on this, it needs to be indemnified by the state.

Informational Items:
• Our Board meetings are held on Friday afternoons at CTA State Council in Santa Anita A at the Westin Bonaventure, Los Angeles. All members are welcome to attend.
• The next Board Meeting will be held Friday, March 29 (1:00 pm Closed Session, 1:30 pm Open Session).
• Like us on Facebook: www.facebook.com/ctanearetired (no “membership” in Facebook required).

The next CTA/NEA-Retired Annual Business Meeting will be held at the May-June CTA State Council meeting on Friday, May 31 at 2:00 pm at the Westin Bonaventure in Los Angeles. All members are invited to attend.
ARTICLE IV – MEMBERSHIP

Section 1. Eligibility

a) Any person may become a member of CTA/NEA-Retired upon payment of membership dues if the person meets the following requirements:
   1) Is or was a member of CTA and/or NEA
   2) Is retired from state affiliates of NEA

b) Any person who was a member of CTA/NEA and is a qualified recipient of service or disability retirement allowances from a public or private retirement system may become a CTA/NEA-Retired Member.

c) Any person who is a member of the National Education Association-Retired (NEA-Retired) and a member of his/her NEA/Pension State Retired Affiliate, but was not a member of CTA and is a qualified recipient of service or disability retirement allowances from a public or private retirement system, may become a Partner Member of CTA/NEA-Retired.

Section 6. Rights of Partner Membership

a) Partner Members shall be entitled to all the benefits and services offered by NEA-Retired (e.g.: NEA Member Benefits, Liability Insurance)

b) Partner Members shall be entitled to receive communications (e.g.: Newsletters/Mailings/E-Mailings) from CTA/NEA-Retired and NEA-Retired

c) Partner Members shall have the right to run for, vote, and hold office in local retired chapters (where applicable)

d) Partner Members shall be eligible to hold appointed positions in the Local and State (Retired) Association

e) Partner Members, as NEA-Retired Members in good standing, shall maintain their membership and governance rights in their “pension state” affiliate.

f) Partner Members maintain the right to run as a retired delegate to the NEA Representative Assembly from their “pension state”, but not as a representative from CTA/NEA-Retired

g) Partner Members shall not have the right to run for or vote in any election of CTA/NEA-Retired officers or CTA/NEA-Retired Representatives to the State Council of Education

h) Partner Members shall not be entitled to any benefits or protections offered to former active CTA Members through CTA. (e.g.: CTA Member Benefits, Legal Representation).
RETIREMENT IN UNCERTAIN TIMES:
15TH ANNUAL CTA/NEA-RETIRED ISSUES CONFERENCE

By Bonnie Shatun, District 3 Director

At the 2019 CTA/NEA-Retired Conference, which was held February 28-March 1 in San Jose, attendees had the opportunity to attend a variety of sessions including Educator Pensions, Computer Security, Medicare, Prop.13 and School Funding, Intergenerational Mentoring, Using Social Media, and Protecting Your Identity. There were also sessions on Travel Tips, Getting Organized, Estate Planning, the Science of Living Better Longer, and New Programs and Discounts from CTA/NEA Member Benefits.

At the Friday breakfast session, CTA President Eric Heins spoke about the heroic job educators did in the fire areas protecting students and helping to transport them out of danger. Not a single student was lost in these tragedies. And, in the days after the fire, our members, even though many had lost homes themselves, contacted their students to make sure they were safe and had a place to stay.

President Heins also spoke about the role educators in the UTLA and Oakland strikes were playing in strengthening the commitment to community schools and a moratorium on private charter schools. “Our goal is to build a school that every child deserves. To do that, we have to confront institutional racism, protect the role of women in our schools and the rights of all students including LGBTQ students.” He spoke of his excitement about the new generation finding their voice, but said retirees still need to be a part of this work. As he ends his term of office, he reminded us that retirement is not an ending. “It’s a reinventing of ourselves and an important and exciting place to be.” On behalf of all of us, President Marc Sternberger thanked Eric for his many years of service to students and our members.

Mary Kusler, Senior Director for Advocacy NEA, shared that educators and retirees have been on the front line and this activism has caused them to step up and run for office. Nationwide more than 1,800 educators were on the ballot in 2018. In addition, many state NEA affiliates are training their members to talk with voters about the importance of public education.

Mary also spoke about the bills recently introduced in the new Congress to reverse the unfair Government Pension Offset (GPO) which reduces by two-thirds Social Security spousal or survivor benefits of people not covered by Social Security themselves and the Windfall Elimination Provision (WEP) which reduces by up to 50% Social Security benefits of those who worked in jobs covered by Social Security and jobs NOT covered by Social Security. These bills are HR 141 (Davis, R-IL) and S.521 (Brown, D-OH). It is NEA’s priority to pass legislation which will fix both situations. Bills that address only one of these issues would be unfair and further penalize our members. Additional NEA priorities are education funding, the “Dreamers,” Higher Education Act, retirement security, gun violence prevention, school modernization and community schools.

Our semi-annual General Meeting was held in the afternoon. Secretary-Treasurer KC Walsh presented our annual budget, which showed a membership growth of 567. (For more information about the General Meeting see Marc’s President’s Perspective in this issue).

The generous CTA/NEA-Retired participants raised a $2,575 for the NEA Fund and, thanks to Mignon Jackson for donating a beautiful handmade quilt to raffle, $997 was raised for the “CTA/NEA-Retired Scholarship in Memory of Sharilynn Gardella Russo.”

Do put next year’s CTA/NEA-Retired Issues Conference on your calendar. It will be February 27-28, 2020 in Southern California.
There’s a new CTA/NEA-Retired Chapter in Channel Islands

By Dayle Gillick, Channel Islands CTA/NEA-Retired Liaison

The Channel Islands Service Center is composed of Ventura, Santa Barbara, and San Luis Obispo Counties. The territory covered by all three counties is expansive and thus the issue of starting a CTA-Retired chapter seemed daunting. Although the interest in having a chapter was there, finding a central meeting spot and getting retired members to travel long distances for meetings just wasn’t appealing. We decided that the best way to service retired members was to focus on creating a “satellite chapter” in each county and then eventually setting up a network between them.

In the fall of 2017, we decided to organize a chapter in Ventura County first. With the guidance of our CTA/NEA-Retired Board Member Bonnie Shatun, we obtained the membership roster for current CTA-Retired members living in Ventura County. I then contacted the local CTA chapter presidents in Ventura County and asked them to provide the names, emails and phone contacts for their newly retiring educators. Bonnie, Roberta Consani, and I emailed several hundred current and new retirees and made personal phone calls to follow up.

Our first event took place on January 22, 2018 and involved two opportunities. We held a brunch at the CTA RRC in Oxnard and a luncheon at University Center, a Conejo Unified School District site. Stephanie Leib from CTA’s Member Benefits Department presented to both groups and each attendee received a folder of information we had put together about the many benefits and protections that come with membership. The information was very well received, and we signed up most in attendance that day!

For our second meeting, we met in May 2018 at the CTA office in Oxnard. CalSTRS Board Member Harry Keiley spoke about the health of our CalSTRS retirement system. Another well received presentation! This meeting was also organizational. Dates for upcoming meetings were set, the meeting location was designated as the CTA office in Oxnard, possible topics for the meetings were suggested and our fieldtrip to the Channel Islands National Park Visitors Center was planned.

The presenter at our most recent meeting was from HiCap and gave wonderfully helpful information about MediCare.

Our Ventura CTA-Retired Chapter is well on its way now. We are working on bylaws and proceeding with our calendar of events. Several of us answered the call and were available to monitor ballot counting for Tony Thurmond in November at the Ventura County Elections Division.

Meanwhile, Mary Strobridge, my CTA-Retired Co-Liaison, has been busy in San Luis Obispo County starting a satellite chapter there. Using our model, she contacted CTA-Retired teachers in SLO County and gathered information about newly retired teachers from local presidents and has had several meetings in that area.

Our idea of developing satellite chapters and keeping meetings local is working in Ventura County and San Luis Obispo County. We will soon begin to focus on getting something going in Santa Barbara County.

We’ve just begun, but we are looking forward to building on our successes.
I

OUTSTANDING RETIRED EDUCATOR "WHO" AWARD

JAMES (JIM) BURFEIND RECEIVES THE ELLEN LOGUE
OUTSTANDING RETIRED EDUCATOR “WHO” AWARD

In a unanimous decision, the CTA/NEA-Retired WHO Awards Committee named Jim Burfeind the recipient of the 2018-19 Ellen Logue Outstanding Retired Educator WHO Award. Soon after retiring, Jim joined CTA-Retired but there was not yet a local chapter in his area. He was interested in having more than just a social club. He wanted the kind of involvement in important issues and activities that he had had as a CTA leader while teaching.

Jim and several former active leaders started working with CTA-Retired V.P. Orval Garrison and Board Member Ed Foglia on starting a chapter. They formed an organizing committee, and in 2016 the first meeting was held. Jim was elected President and the Chico Service Center Council contributed seed money.

Jim helped this new chapter get involved in school board elections by doing phone banking, precinct monitoring and talking with targeted voters. When the 57 member Durham Unified Teachers Association had a labor crisis, Chico-Retired mobilized a group of retirees to support their activities. And, when Yuba City Teachers Association went on strike, Chico retirees walked the picket line. The word quickly spread that Chico-Retired was an activist group of retirees that got things done.

CTA/NEA-Retired repeated their election efforts in 2018 by doing what they had done in 2016. And, when the call came from CTA to help get Tony Thurmond elected State Superintendent of Public Instruction, the Chico-Retired chapter wrote over 1,000 postcards to active and retired members. Jim also joined CTA Retired leaders last spring in Sacramento to lobby legislators about increasing education funding.

When the Camp Fire, one of the worst disasters in our state’s history occurred in Butte County, Jim personally tried to contact every retired member who lived in Paradise and nearby areas. He helped them through the process of applying for CTA Disaster Relief and held activities which gave them an opportunity to come together to help cope with the loss of property and loved ones.

Chico Service Center Council Chair Kat Kennedy said it well: “Jim is up to date on community and political events and always communicating with the Service Center to see how he can help. He’s a partner in all our activities that he can. He or one of his colleagues hosts a table at all of our events and reports out at all of our meetings. He also participates in our planning meetings every year. He and his members help locals with events such as packing school board meetings, holding signs or getting the word out. Such a wonderful resource for union brothers and sisters in this area!”

Congratulations Jim Burfeind! You are truly deserving of the Ellen Logue WHO Award.
CTA’S EQUITY AND HUMAN RIGHTS CONFERENCE EMPHASIZED THE NEED FOR DIALOGUE AMONG OUR MEMBERS

By Mary Rose Ortega, Minority At-Large Director

The 2019 CTA Equity and Human Rights Conference was held March 1-3 in San Jose. This year’s conference included several CTA retired members and presenters. The conference began with a Racial Equity Affairs Committee (formerly EMAC) Forum where participants had an opportunity to network and share their experiences. The discussions included recognizing “What is Social Justice?” and “What are our differences and similarities?”

Topics included education, religion, social economic background, cultural background, language (including accents) and sexual orientation.

The conference workshops dealt with social and educational issues and historical events that the educational system has avoided teaching. One of the workshops I attended was “Untold Asian American Civil Rights Stories” presented by UTLA/NEA retired members Jenny Chomori and Esther Taira. Their presentation on the February 19, 1942 Executive Order 9066, which interned over 177,000 Japanese Americans during WWII, included information about the Fred Korematsu Day of Civil Liberties and the Constitution. This law was enacted in California in 1986.

Keynote Speaker Kalonji Saterfield believes that creating strong relationships with students is an important aspect of being a powerful educator and the way in which educators listen can assist in creating those strong bonds with students. His message is aimed at raising awareness about the powerful role communication plays in obtaining success both inside and outside the classroom.

That’s why the study of Human and Civil Rights must be taught in our schools.

At the CTA Human Rights Dinner and Awards, several amazing educators were recognized for the work they have done in their communities and continue to do beyond their daily work as educators. SCTA (Student CTA) was recognized with the CTA Service Center Council Human Rights Award. Through its fall 2018 Social Justice Symposium and organizational changes, SCTA worked to gain a greater voice for all its members in policy and decision-making, encourage broader leadership, improve intergroup relations, and design and implement projects about the meaning of human and civil rights.

At the Closing General Session Luncheon, we were entertained by an excellent Mariachi performance by Alum Rock Students. It was enjoyable to watch these talented musicians. This conference was interesting and important and one I recommend to our CTA retired members. It will be held next March in Southern California.

This history and websites for additional research.

SENIOR HEALTH ISSUE: STOP FALL-RELATED INJURIES

By Sharon Fitch Boudreau, District 4 Representative

Help, I’ve fallen and I can’t get up.” That phrase took on special meaning to me last September when I fell in my kitchen, fractured my femur and began months of recovery. And this can happen to anyone as we heard about Supreme Court Justice Ruth Bader Ginsburg’s fall last year. During my recovery, I had plenty of time to harken back to an article I read about the perils of falling for seniors. As a senior, I should have read it more carefully and maybe could have avoided months of pain.

According to the Centers for Disease Control and Prevention, each year one in three adults age 65 or older falls. In this same group, falls are the leading cause of death from injury and most occur at home according to the National Safety Council.

Seniors fall due to a variety of reasons. One is that they are so afraid of falling, they curtail their activities and their inactivity causes unsteadiness. Some others are that muscle strength and balance aren’t good, they have vision problems or a prescription drug reaction. The good news is that many of these factors can be avoided or prevented.

How can a senior decrease their chances of falling? First, keep moving, exercise and watch your weight. Check with your health care provider or a nearby fitness center for classes to help seniors improve balance and increase strength. A program such as Silver Sneakers is free with some Medicare programs. Next, check your medications with your physician to be sure that none of them could be affecting your balance.

It is also important to do a Home Safety Assessment because most falls happen at home. Often minor changes can allow seniors to “age in place” which most seniors would prefer. The easiest steps are to de-clutter rooms, move or tape down throw rugs, relocate electrical cords, increase lighting, add motion detectors, check mattress height and have chairs with arms.

Most falls occur in the bathroom, so put grab bars in the shower/tub and armrests near the toilet. Make the floor slip-free and perhaps install a raised toilet seat. Awareness of your surroundings and careful movement will also keep you healthy.

CTA/NEA-RETIRED GOALS 2018-2019

This Association shall be dedicated to the promotion of retirement with dignity, a fair and just retirement income, a comprehensive health care program, and decent, affordable housing through:

a) Promoting social, professional, political, economic status and the general welfare of retirees;
b) Promoting volunteer participation by its members in educational and civic affairs;
c) Promoting united action with local affiliates of CT/NEA and others devoted to the cause of public education;
d) Promoting united action with others devoted to improving the quality of life of retirees.

**YOU NEED TO KNOW**

In the 2017-2018 fiscal year 467 members were assisted by grants totaling $725,000.

**CTA DISASTER RELIEF FUND**

Is now administered by CTA Member Benefits

If you or any member you know has been affected by the recent wildfires or other disasters, please know that CTA/NEA-Retired Members are eligible for disaster grants!

There are claim filing deadlines…

**Apply NOW!**

Please visit www.CTA.org/disasterrelief for further details and applications