Happy Summer! By the time you read this the CTA/NEA-Retired Delegation to the NEA-Retired Annual Meeting and the NEA Representative Assembly should have finished up their duties in Houston. I’m sure the 18-strong delegation you elected this year will represent us well. A report on our participation and actions taken at these meetings will be featured in the next issue of the Advocate. (You can find the list of delegates on our website CTA.org/retired with election results).

Special thanks to our CTA/NEA-Retired Elections Committee who processed, reviewed and tallied thousands of ballots for the NEA and State Council Alternate election back in March. Chairperson Maria Little and committee members Carolee Padgett, Misou Brown, Nancy Scheppier, Ramona Lancaster, and David Nigel labored many hours, through a few technical problems and uncooperative computer moments to assure that the final results were accurate.

Speaking of elections, the CTA/NEA-Board of Directors has decided to move to “Online/Electronic” Voting starting with our NEA-RA Delegate and CTA/NEA-Retired Officers elections in Spring 2020. Please find the information about moving to this process in this issue and use the U.S. mail, email or the phone to choose your voting options (see instructions in this issue).

We are still looking for “Local Program Coordinators” to help setup and facilitate our NEA Grant for the New Teacher Mentoring Program. We’re now offering a stipend, in addition to reimbursement for travel, postage, etc., to those members willing to commit some time to coordinate/match up retired mentors (aka: experienced advisors) with new educators and making sure the program gets going. Now would be a great time to start up a program for the 2019-2020 school year. If you or someone you know may be interested please contact your Local Retired President, CTA/NEA-Board Member, or me.

As mentioned previously, two “Social Security Fairness” bills have been introduced in the Congress to eliminate the GPO/WEP “Social Security Offset Laws.” To date, there are 30 Senators, (including both Harris and Feinstein), co-sponsoring S.151 and 185 Representatives signed on to HR 141. For more details about the negative impact the current offsets have on millions of retirees and to take action on these bills go to: NEA.org/issues. You can also check the progress and support for these bills at Congress.gov by typing in the bill numbers. Please urge your U.S. Senators and House Representative to support passage of H.R. 141 (Davis, R-IL) and S.521 (Brown, D-OH)!

Because our retirement security and the survival of public education depend on decisions made by elected officials and decisions made at the ballot box, we continue to urge our members’ involvement in the political process. CTA/NEA-Retired has plans to be part of CTA’s “grassroots” lobbying campaign in the upcoming year. We need to keep the pressure on the CA Legislature to keep our pensions secure and adequately funded, as well as join CTA’s efforts to bring accountability to and curb expansion of “for profit” charter schools. We are updating our “RAN” (Retired Action Network) email list. We anticipate using this list of retired members to alert and mobilize teams to contact experienced advisors (aka: retired mentors) with new educators and making sure the program gets going. Now would be a great time to start up a program for the 2019-2020 school year. If you or someone you know may be interested please contact your Local Retired President, CTA/NEA-Board Member, or me.

For the past decade or more, California, along with many other states, has been faced with an organized push back on public employee pension systems including CalSTRS and CalPERS. The opponents’ major focus was replacing current Defined Benefit pensions with Defined Contribution plans similar to what is currently used in the private sector.

Within the educational community, a major concern was the growing unfunded liability within the CalSTRS pension fund that was caused by several strong economic downturns. CalSTRS funds were significantly negatively impacted by the 2007-2008 global financial crisis when the fund went from “fully funded” to only about 64% funded.

California is the only state that stepped up to save all state based Defined Benefit retirement systems. The Public Employees Pension Reform Act for 2013 (PEPRA) is the landmark legislation that saved all California based retirement systems including CalSTRS from catastrophic consequences. This legislation came about with considerable input and advocacy from CTA members and our legislative advocates.

The state made the necessary investment in Defined Benefit public employees’ retirement systems by increasing funding support and incorporating necessary reforms rather than cutting benefits and reducing pensions as most other states did.

PEPRA improved the retirement

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BOARD REPORT

By KC Walsh, Secretary-Treasurer

CTA/NEA-Retired Board of Directors
Meeting - March 29, 2019

Action Items:
• Approved sending membership bylaw changes to membership.

Reports:
• CTA/NEA-Retired Election results for our eighteen NEA-RA delegates and alternates for CTA State Council Alternate Representatives are posted on our website. Vote counting will be done in Sacramento next year. Sandy Thornton will be the new elections committee chair. Thanks to Maria Little and her committee and to Gerry Fong.
• Our CTA/NEA-Retired Scholarship in honor of Sharilyn Russo has 27 applicants. The selection committee will meet virtually to choose scholarship recipients. The raffle for the quilt, donated by Mignon Jackson, was a huge hit and a tremendous boon to our fundraising. Thanks to Mary Rose Ortega for organizing the raffle!
• Grants for our New Teacher Mentoring Projects are now available to encourage more of these groups to be established. We will now award $500 stipends to organizers.
• NEA-Retired Organizing Meeting/NEA Summit meeting was held 3/15-3/17 in Denver. Marc Sternberger, Gerry Fong, and Jim Burfiend attended. There was some disappointment that few sessions and workshops were representing CT A at the California Democratic Convention. Both have been extremely busy attending meetings throughout Region 3.

CTA/NEA-Retired Board of Directors
Meeting - May 31, 2019

Action Items:
• Approved motion to investigate online voting and implement as feasible (see below).
• Approved 2019-20 budget.
• Approved Partner Membership bylaw language.

Reports:
• Marc reminded us that dues increase will occur on July 22, 2019.
• We are happy to report that we had a record number of applicants this year for our CTA/NEA-Retired Scholarship in Memory of Sharil Lynn Gardella Russo. We awarded scholarships to Faith Christensen (Orange), Joanna Mariani (Alhambra) and Chidera Oyeka (San Jose).

H.R. 141 and S. 521 have been introduced in Congress. NEA is supporting both bills as they call for the complete repeal of GPO and WEP.
• Thank you to our North Bay chapter for their suggestion of having CTA/NEA-Retired pins to add to our visibility. They will be distributed to local presidents to award to member activists.
• Board members report included information on valuable presentations including “Vial of Life,” HICAP, emergency preparedness, and wonderful field trips to see the spring bloom wildflowers, notorious RBG exhibit at Skirball Cultural Center and the Reagan Museum.
• Jennifer Baker, CTA Governmental Relations staff, reported that the Governor has proposed that additional revenue be provided to school districts to cushion the blow that the districts are having to contribute to CalSTRS. Jennifer encouraged us to lobby on pension issues especially since pensions continue to be under attack.

Informational Items:
• Our meetings are held on Friday afternoons at CTA State Council in the Santa Anita Room A at the Westin Bonaventure Los Angeles. All members are welcome to attend.
• Like us on Facebook: www.facebook.com/ctanearetired (no “membership” in Facebook required).

CTA/NEA-Retired Board of Directors
Meeting - July 22, 2019

Action Items:
• We are planning to send members to the CTA Summer Institute Member Benefits training. These members will then be able to make presentations at pre-retirement and retirement workshops.
• KC reported that the increased costs of running our elections has had a significant negative impact on our budget. The overall cost was $55,000. One example was the cost of envelopes at $8,000! That led to discussion and our motion to investigate the feasibility of online voting.
• Board Members Gretchen Lipow and Ed Foglia reported that most locals in Regions 1 and 2 are moving along. Board Members Bonnie Shatun and Mary Rose Ortega submitted written reports as they were representing CTA at the California Democratic Convention. Both have been extremely busy attending meetings throughout Region 3.

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local legislators and participate in activities when issues important to us are being decided. If you wish to be part of “RAN”, send cta-retired.org your name and current email.

CTA’s Campaign 2020 is already gearing up and needs our help. The “Schools and Communities First” initiative will be on the California ballot in November 2020. This proposition, if passed, will bring approximately $11 billion dollars more every year into California’s schools, local communities and public services. The proposition closes commercial property tax loopholes to ensure that big corporations pay their fair share, while guaranteeing existing tax protections for residential and agricultural land. Scare tactics, aimed especially at retirees, are already in the works. We anticipate our membership’s involvement will be crucial as we attempt to convince other retirees that passage is in our best interests, in addition to those of our families and communities. This initiative does not threaten retirees’ homes or retirement security. We will need everyone’s participation, even if it’s just to send a few post cards, emails, or make phone calls.

The “Partner Membership” Bylaw Amendment was passed by members attending our Annual Business Meeting in Los Angeles on May 31. This bylaw allows 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.” When new membership forms and rules are updated in a few months, these NEA-Retired “Lifers” who wish to be involved with their CTA Retired Local Chapters, will be able to have “membership status” in the organization.

Speaking of Union Action… Many of our CTA/NEA-Retired Members joined the picket lines and rallies during the UTLA and OEA Strikes. Our participation has been noted and sincerely appreciated by our active CTA colleagues. Our members have also been demonstrating at several other district schools and board meetings and showing support at union/community meetings.

The momentum seems to be growing with #RedforEd and other teacher/education movements across the country. However, a long battle is anticipated as we continue to fight for public education, health care, living wages and secure pensions -- also known as human rights! We need everyone’s participation, even if it’s to just send a few post cards, email, or make phone calls.

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• Vice President Orval Garrison commented that the membership development trainings that have been held throughout the state have been very successful as outreach to retirees and establishing new chapters.
• Alen Ritchie, NEA Executive Council, noted that NEA-Retired has an organizing toolkit available on the website. He also noted that the NEA-R meeting will be paperless.
• Dana Dillon introduced the new CalSTRS Board Chairperson, Sharon Hendricks. Dana also reported on CalSTRS expansion to change technology infrastructure which is aimed at reducing the number of troubling overpayments.
• Big news from our staff consultant, Gerry Fong, is that we are ready with Phase 1 of online membership signups. The website can process both annual and renewal memberships by credit card. Phase 2 will add pre-retired and CalSTRS deduction memberships. This is a very welcomed and long-awaited addition.

• Jennifer Baker, CTA Governmental Relations staff, reported on the budget. No matter which plan is agreed to, CalSTRS will receive significant new funding. The Senate is proposing $3 billion from Proposition 2 funds to pay down the state portion. The Assembly proposal calls for $1.5 billion to both CalSTRS and PERS. The details are being worked out in Sacramento.

Informational Items:
• Our meetings are held on Friday afternoons at CTA State Council in the Santa Anita Room A at the Westin Bonaventure in Los Angeles. All members are welcome to attend.
• The next Board Meeting will be held Friday, Oct. 25, 2019 (1:00 Closed Session/1:30 Open Session).
• Like us on Facebook: www.facebook.com/ctanearetired (no “membership” in Facebook required).
The CTA/NEA-Retired Scholarship Committee selected Chidera Oyeka, Joanna Mariani, and Faith Christensen out of a record number of qualified and deserving applicants, to be this year’s recipients of the Sharilynn Gardella Russo Memorial Scholarships.

Chidera Oyeka graduated Cum Laude with a B.A. in Psychology from UC Merced in 2015 and has just completed her second year of a three-year Master’s Program in Speech Language Pathology at San Jose State University.

Chidera wrote in her application, “As a first generation Nigerian… my youth was filled with miscommunications due to my inability to understand American communication rules.” This experience has “inspired me to become an SLP in culturally diverse schools.” In her application she also stated her objective, “To graduate with a Master’s Degree in Speech Language Pathology and work in underserved and underrepresented communities as a school-based speech language pathologist.”

This past year, Chidera received her clinical experience at the Armstead Center for Communicative Disorders at SJSU where she “treated clients with neurological deficits and developmental delays, and created functional goals and lesson plans to improve clients’ speech and language.” Previously, Chidera served several years as a para-educator in an Elk Grove Unified School District Special Education Program for students with “moderate/severe disabilities.”

In her recommendation, her SJSU professor and clinic supervisor praised Chidera’s skills in working with clients with a variety of disabilities including autism, developmental delays and mental health issues. She wrote, “Watching Chidera work with them was ‘magical’. She immediately recognized their particular talents, capitalized on these skills, developed lessons to engage them, and facilitated some of the best therapy that I have ever seen.”

Joanna Mariani is earning her Master’s Degree in Communicative Disorders at California State University Northridge. While attending classes and completing the required and internships for this degree, this CTA Member also has been teaching kindergarten in the Alhambra Unified School District. Earlier in her career she earned a BS in Early Childhood Education and Spanish, but decided to pursue a career change several years ago.

In her application she stated, “…Proceeding through these programs while teaching kindergarten has been one of the most challenging and rewarding experiences for my career. I am reflective, critical, and determined. My education has given me an opportunity to exercise these qualities in my new career path as well as my current teaching practice…” As for the future, Joanna says “After graduation, I hope to continue to work with the students of Alhambra… It would be an honor to utilize my teaching experience with my new skills to serve this diverse community as an SLP.”

Her principal for the last four years, in a glowing reference, wrote “Ms. Joanna Mariani is a very professional, reliable, collaborative, and self-motivated individual. The care I observe her place into her work is truly incomparable …”

Faith Christensen received her Bachelor’s degree from the University of Oregon in Communication Disorders last spring and will be entering San Diego State University’s Master’s Program in Communicative Disorders and Sciences this fall. This past school year, between programs, she has served as a Special Education Instructional Aide in the Orange Unified School District.

During her undergraduate program Faith was a member and leader in “Best Buddies,” a volunteer movement that creates opportunities to establish one-to-one friendships, integrated employment, and inclusive living for individuals with developmental disabilities. In her application she stated, “I hope to work with children with autism in early intervention settings such as preschool and elementary schools, specifically those who have needs that require alternate methods of communication.”

Her professor for several undergraduate courses wrote, “Based on her academic success, personal qualities, and applied experience, I believe Faith will do excellent work as a graduate student and become a compassionate and effective clinician.”

The 2019 Scholarship Committee included: Ed Foglia, Harris Kight –Moore, Shelley Krantz, Mary Rose Ortega and Marc Sternberger.
CALIFORNIA ALLIANCE FOR RETIRED AMERICANS HOLDS LOBBY DAY

By Pat Ryan, CARA Representative

On May 23, 2019, at the state capitol in Sacramento, CARA held its Annual Legislative Lobby Day. The event was held in conjunction with Disabilities Action Coalition’s Disability & Aging Capitol Action Day. Over 1,000 participants were divided into teams which then visited every Assemblymember’s and State Senator’s office to discuss pending legislation affecting retirees. Among the issues that “Member-lobbyists” advocated for were bills concerning Social Security Insurance (SSI) increases and long-term care support services.

CARA’s involvement in the general election of 2018 was very successful. CARA worked to mobilize the senior vote that helped change the California Congressional delegation in Washington, DC. CARA is looking ahead to the general election of 2020 with its “Senior Vote Project” and to continuing its campaign focused on issues that are in the best interest of seniors. CTA/NEA-Retired is a member organization of CARA and therefore our members are also considered members of CARA and are encouraged to participate in their activities.

Notice: The CARA State Convention will be held October 22-23, 2019 at the Sacramento Masonic Center, 1123 J Street, Sacramento. To register and for more details about the conference program topics go to californiaalliance.org.

TRAVELIN’ TO THE NEA ELECTRONICS STORE

By Orval Garrison, Vice President

My wife and I moved from Southern to Northern California over seven years ago. In spite of our grown son’s advice to dump the old and get new, the things we took north included the aging entertainment system—old box TV, record player, clumsy speakers, and the like. It was not long before those items began to fail.

I had known about NEA Member Benefits Electronics Store, but I had not used it. It was time to give it a try. The Electronics Store is accessible through NEA Click & Save, the popular Member Benefits site for the online purchase of goods and services.

NEA Electronics Store includes products such as computers, video flat screens, sound equipment, tablets, cameras, video games, TV services, and more. The brands are familiar: HP, Dell, Apple, LG, Samsung, Bose, Lenovo, Panasonic, Canon, Westinghouse, and others.

You may buy products online and have them shipped or, in some cases, you may buy and pick up at the store. Providers and retailers are similarly familiar: Best Buy, Microsoft Store, Verizon, Office Depot, DirectTV, Symantec, Dish, and so on.

I am pleased to announce that my wife and I are enjoying a flat screen, sound bar, subwoofer, Blu-ray, and turntable courtesy, in part, to purchases through NEA’s Electronics Store. A turntable came from a different retailer, and my vinyl collection has never sounded better. The flat screen is curious to us, since we had just accustomed ourselves to the gradually diminishing clarity of our very old Zenith box TV.

The NEA Member Benefits Electronics Store is worth exploring even if you do not buy there. You get an idea of what products are available, what pricing is like, and what the member discounts are. AND, because everything purchased is under the umbrella of NEA Click & Save, WOWPoints are earned with each purchase, the famous Click & Save rewards points that can be saved and used for future purchases.

It’s easy to explore: Go to www.neamb.com. Go to What We Offer and Online Shopping. Then click to NEA Click & Save and then Electronics.
systems to help curb the spiraling abuses while establishing a two-tiered retirement structure for all public employees who were hired (police, fire fighters, teachers, ESP, etc.) beginning in 2013. The CalSTRS Funding Plan of 2014 (AB 1469) made all parties (active members, districts and the state) increase their contribution rates to fully fund the CalSTRS Defined Benefit Pension Program by 2046. Other states faced with public pension plan issues cut benefits, enacted Defined Contribution plans with no state added contributions, or have done nothing to address their public pensions’ unfunded liability.

CalSTRS’ responsibility to its current and future retirees is to invest the assets of the investment portfolio with the goal of increasing the rate of return in order to ensure that the fund will be financially sound. It is extremely important that CalSTRS achieve a three-year benchmark average of 7% average rate of return on their investment in order to meet their fiduciary responsibility.

It is imperative that CalSTRS manage our assets in a financially prudent manner. CalSTRS management has cautioned that proposed divestment initiatives can bring about encroachment on the fund and may have a very serious impact on the long term security of the CalSTRS pension fund.

An issue that repeatedly comes up is to divest from holdings in companies that may be viewed as not “socially responsible.” Currently, there is legitimate concern among our members regarding the environment and climate change. Without going into the issues around fossil fuels and non-renewable energy and their negative impact, CalSTRS’s position is that the solution to these important environmental issues cannot be effectively addressed by CalSTRS divesture from fossil fuel investments.

Engagement with the fossil fuel industry as shareholders is a far more effective means of influencing their policies that effect global climate change than divesting. CalSTRS is leading ongoing engagement with more than 33 companies worldwide to encourage them to provide better disclosure regarding climate risk in line with the Task Force on Climate-related Financial Disclosure (TCFD). This engagement has helped drive adoption and as of January 2019, nearly 500 companies have committed to support TCFD.

CTA/NEA-Retired and CTA send member representatives and CTA staff to all CalSTRS and CalPERS meetings and are committed to monitoring, reporting on and protecting our pension funds for our members.
CTA/NEA-Retired is committed to a secure, fair, and inclusive election process. In the past decade we have seen the cost of our elections more than double because of increases in postage, materials, and clerical help. In order to maintain the integrity of your vote, while making the process more efficient and less costly, we are now proposing to move to electronic/online voting beginning with our Spring 2020 NEA-Representative Assembly/NEA-Retired Annual Meeting Delegate Election and the Election of CTA/NEA-Retired Officers.

We expect that this will be more convenient, less expensive, and “greener” for many of our members, but recognize online voting may not be an option for all of our members.

Please complete the form below: Mail, Email, or Phone in your balloting preference. To be sure everyone who wishes to participate in the election is given the opportunity we need to be sure our email and home addresses are accurate and current.

☐ I wish to receive voter information electronically and vote online.

Name: ________________________________________
Email: ________________________________________ (home)

☐ I wish to receive voter information by U.S. mail and vote by mail-in paper ballot.

Name: ________________________________________
Address: ________________________________________
____________________________________

Please Mail your response to:
CTA/NEA-Retired, c/o Jordan Schultz
1118 – 10th Street, Sacramento, CA 95814

Or Please Email your response to: CTA-Retired@cta.org
Or Please Phone in your response to: (650) 552-5439
CTA/NEA Retired joined local CTA Presidents and thousands of educators and allies on May 22 at the State Capitol to lobby legislators, march through Sacramento and rally to demand funding for our schools and to urge support for a package of bills that will fix the broken laws governing charter schools in California. Pictured from left are Gretchen Lipow, Ed Foglia, Marc Sternberger, Bonnie Shatun and Don Dawson. #RedForEd

More than 100 members of UTLA Retired participated in a presentation given by NEA Member Benefits trainer Sean Mabey and learned more about the many benefits and protections that come with belonging to CTA/NEA-Retired.