CTA/NEA-Retired: 650-552-5439 • CTA Member Benefits: 650-552-5200 • CTA Membership Accounting: 650-552-5278
www.cta.org/retired • CTA-Retired@cta.org • www.facebook.com/ctanearetired

Retiree Advocate

STAY CONNECTED • BE PROTECTED • ENJOY BENEFITS

VOLUME XVI • ISSUE V • DECEMBER 2019

PRESIDENT’S PERSPECTIVE

CTA’s Campaign 2020 has already started and our support is needed. We are now helping circulate petitions to qualify the “Schools and Communities First” initiative for the CA ballot in November 2020. This proposition, if passed, will bring approximately $12 billion dollars more every year into California’s schools, local communities and public services. The proposition closes commercial property tax loopholes to insure big corporations pay their fair share, while guaranteeing existing tax protections for residential and agricultural land. Scare tactics, aimed especially at seniors and retirees, are already being employed in the media and in mailboxes. We anticipate our membership’s involvement will be crucial as we attempt to convince other retirees that passage is in our best interests and those of our families, and communities. This initiative does not threaten retirees’ homes or retirement security. We will need everyone’s participation, even it’s to just to sign and circulate petitions, send a few post cards, emails, or make phone calls. For more information, see page 4 of this issue.

As I previously mentioned, the CTA/NEA-Retired is moving to “Online/Electronic” Voting starting with our NEA-RA Delegate, CTA/NEA-Retired Officers, and Special Region IV Director/State Council Seat elections in Spring 2020. Please find the information about moving to this process in this issue and in an ALL Member Mailing coming soon! Then use email or phone to choose your voting option!

The 18-strong delegation you elected this year represented us well at the NEA-Retired Annual Meeting and NEA-Representative Assembly this summer. One of the highlights for us at the Annual Meeting was the NEA-Retired Communication Awards presentation. Our “Retiree Advocate”, Bonnie Shatun, Editor, took top honors again as “Established State Retired Newsletter”. After three first place wins (and one second place) we now are in the NEA-Retired Newsletter “Hall of Fame”. A report on other actions taken at these meetings is featured in this issue.

We are still looking for “Local Program Coordinators” to help setup and facilitate our 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 and new educators and making sure the program gets going. Now would be a great time to start up a program. If you or someone you know may be interested please contact your Local Retired President, CTA/NEA-Board Member, or me.

Because our retirement security and the survival of public education depend on decisions made by elected officials and choices made at the ballot box, we continue to urge our members’ involvement in the political process. CTA/NEA-Retired has been awarded a $7000 NEA Grant this year to help us update and utilize our “RAN” (Retired Action Network). Retirees who have added their names to this email list will be trained to be part of CTA’s “grassroots” lobbying campaign. We need to keep the pressure on the CA Legislature to keep our pensions secure and adequately funded. Additionally we plan to support CTA’s efforts to increase funding and improve the environment for teaching and learning in our public schools. We anticipate using this list of retired members to alert and mobilize teams to contact local legislators and join CTA’s and our Community Allies’ campaigns when issues important to us are on the line. If you wish to be part of “RAN”, send cta-retired@cta.org your name and current email.

As mentioned previously, two “Social Security Fairness” bills have been introduced in the Congress to eliminate the GPO/WEP “Social Security Offset Laws”. For more details about the negative impact these laws 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)!

As you are perusing this edition of the Advocate please make note of some important events and deadlines: Registration is open now for our 2020 CTA/NEA-Retired Issues Conference; Nominations are open for our 2020 Ellen Logue WHO Award. Additionally, watch for Candidacy Forms for Delegates to the 2020 NEA-R Annual Meeting and NEA-RA (Atlanta), for CTA/NEA-Retired Officers and to fill the unexpired State Council Region IV Seat in the Dec-Jan California Educator.

Have a Happy, Healthy and Safe Holiday Season!

Marc R. Sternberger
President
CTA/NEA-Retired

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

Action Items:
- Approved 2019-2020 CTA/NEA Goals
- Approved online voting for our 2020 election
- Approved NBI to CTA Board of Directors that CTA become sustaining member of CARA
- Approved provisional bylaws for Central Coast and Feather River chapters
- Approved $300 revitalization grants for Central Coast, Feather River, Service Center One, Sierra and Tulare-Kings chapters
- Approved motion to send letter to all members requesting donations to NEA FUND

Reports:
- President Marc Sternberger reported that our RETIREE ADVOCATE again won best newsletter at the NEA-Retired Annual Meeting and we are now in the Hall of Fame. Marc thanked Editor Bonnie Shatun for all her hard work.
- Marc also noted that we received an NEA grant to update our Retired Action Network. This will help us be more proactive and lobby more effectively. He also reported that new teacher and intergenerational mentoring will continue and that it has been especially challenging to get going.
- Marc and Gerry met with our officer liaison, CTA Vice President David Goldberg. One issue discussed was the need for more representation on CTA State Council. This issue will be a focus for us this year.
- Sad news to report was that Pat Ryan, our CARA liaison has passed away. Another very active member and consistent volunteer for our table staffing, longtime leader Danny Howerton, also passed away.
- Orval thanked all table ambassadors for their work at conferences and State Council. We appreciate their contribution.
- Secretary-Treasurer KC Walsh reported that our membership increased by 889 since last September.

Reports:
- Board members shared about new “school” year welcome activities and field trips.
- Gerry Fong, CTA Staff, reported that as of Nov. 14, CTA/NEA Retired will be moving back to the Governance Department in the Burlingame office. Our support staff will be Nessa Connor, aided by Erika Kawasaki and April Laxa. Several Board Members commented on the outstanding work Jordan Schultz has done as our staff support. Gerry also reported that our popular CTA/NEA Retired pins will be available for a minimum donation of $10 at our table. The money will be donated to the Sharplynn Russo Memorial Scholarship Fund.
- Ed Foglia reported on SBMA, the Supplemental Benefit Maintenance Account from CalSTRS. This is a fund to help maintain “buying power” for our older retirees. It is a difficult issue and we are working on a proposal to increase the amount of buying power for these retirees.
- Bonnie reported on the “Schools and Communities First” signature gathering and campaign. She stated how critical our help will be to getting it qualified for the November 2020 ballot. Petitions will be available at all CTA offices and must be turned in by March 2020. Every single chapter should have a presentation about the importance of this initiative.
- Ed introduced Karen Yamamoto, our retired teacher representative on the CalSTRS Board. He also introduced Denise Bradford, our new CalSTRS Board Member. Bonnie acknowledged all of Dana Dillon’s incredible work on the Board, and Ed remarked that Dana always asked the smartest questions and never forgot her roots.
- Our meetings are held on the Friday afternoons of CTA State Council in Santa Anita A Room at the Westin Bonaventure in Los Angeles. All members are welcome to attend.
- The next CTA/NEA-Retired Board Meeting will be held Friday, Jan. 24, 2020 @ 1:30pm All members are welcome to attend.
The 36th NEA-Retired Annual Meeting was held in Houston, Texas June 30-July 1. More than thirty CTA members attended including the eighteen CTA/NEA-Retired delegates elected to represent our members at the NEA Representative Assembly (RA). Attendees got updates and planned strategies for the NEA Representative Assembly which follows the meeting. We heard reports from our NEA officers and staff, elected NEA-Retired candidates for Executive Council, NEA Board of Directors and the NEA Resolutions Committee and heard speeches from candidates running for NEA office.

Senior Director of the NEA Center for Advocacy, Mary Kusler, addressed the group on Sunday afternoon. Mary is always well-received and seemed exceedingly energized this year. Her topic was: “Engaging Educators for a Better Future.” Mary began her presentation by reviewing our greatest victories of in the 2018 election throughout the country. She gave examples of how in states which elected supporters of public education, it has made a difference and resulted in improvements in education funding (MN, KS), increasing starting salaries (PA, ID, IL), significant pay increases (IL, VA, NM, Charter School Accountability (CA), protecting educator pensions (NH), Caps on Charters and (WI), removing test scores from teacher evaluations. Mary updated us on the status of GPO/WEP legislation. HR 141, Strengthen Social Security Act, sponsored by Rep. Rodney Davis (R-IL) has 190 bipartisan co-sponsors. Senator Sherrod Brown’s (D-OH) Social Security Fairness Act, S 541, already has 30 bipartisan co-sponsors. Information was shared about H. R. 3934 (Brady R-TX) which calls for some needed changes in WEP. This bill would provide relief for many, but continues to penalize others and does not address those affected by the GPO. Mary concluded her presentation by reviewing the list of presidential candidates, the primary schedule and how NEA is working to engage the candidates.

Andy Coons, Senior Director of NEA Center for Great Public Schools, spoke on “Supporting Professional Excellence.” Andy reviewed various programs throughout NEA that provide professional support to NEA members. The range includes leader institutes, Ed Communities, and micro-credentials. The goal is to “build a system of Association-convened, educator-led professional learning and supports for all educators across their career and continue to ensure student success.”

Alice O’Brien, NEA General Counsel, reported on all items legal, particularly updates since the Janus v. AFSCME decision which overturned “fair share” contract provisions for public workers. There have been 90 cases filed, 28 of these against NEA. The assault continues, ranging from recovering back fees to invalidating union access. So far, we have been winning these early cases. For example, back fee claims have been dismissed because the “unions collected and spent fees in good faith reliance on Supreme Court precedent and state law...”.

NEA Retired President Sarah Borgman reported on the NEA budget, specifically the impact on NEA Retired. Although it was anticipated that NEA would face a loss of 216,000 fair share payers post Janus, this failed to occur and so the budget news is good! Sarah noted that NEA Retired has had all its budget needs met in the last two years. Fundraising auctions were held throughout the meeting to raise money for the NEA Fund (PAC) for the upcoming national elections. Delegates generously contributed $30,870. At this meeting, delegates also contributed $13,537 for the Jack Kinnaman Scholarship fund which awards $2,500 scholarships to Aspiring Educators to help with their higher education costs. Three of the four winners were present to receive their scholarship awards.
CTA/NEA-Retired is working with CTA to help qualify and pass the Schools and Communities First Initiative which will bring into the state more than $12 billion annually to be used for public schools and community services by closing loopholes so large corporations have to pay their fair share of property taxes. Residential properties would be exempt from this change. The first step is to collect 1.6 million signatures by March 2020 to put it on the November 2020 ballot. You can help by picking up a petition at any CTA or Local CTA Association office, signing it and asking friends and family to sign. Each petition must be County specific and has room for nine signatures, but they don’t have to be full to be counted.

When you’re ready to turn it in, fill out the circulator section at the bottom and return it to any CTA or Local Association office.

For more information and resources about Schools and Communities First go to cta.org/tax fairness. A link to two outstanding videos is on the right side of that page. Do take a few minutes to watch the short video Schools and Communities First – Petition Gathering on the rules and tips for circulating petitions. Also on that page is a link to Strong Schools 2019, a four minute video that explains why schools have lost funding over the last forty years.

CTA STATE COUNCIL RETIREMENT COMMITTEE UPDATE

By Marc Sternberger, President

The Retirement Committee met during the October 26-27 State Council in Los Angeles. Members were introduced, including Leonard Goldberg, the new chairperson.

Lori Easterling, CTA Manager Legislative Relations, explained some of the complexities and issues around divestment. She shared that the legislature often wants to direct how the money is invested, but is unwilling to indemnify the fund against potential loss of funds. Additionally, she spoke to how other education groups such as ACSA (Administrators) and CASBO (School Boards) continue to raise concerns about how much money CalSTRS costs school districts. She gave the committee a brief history of how the CalSTRS full funding plan was created with ACSA and CASBO at the table when decisions were made. She also noted that CalSTRS is projecting that employer contributions will decrease in future years – a fact that districts fail to acknowledge. This rhetoric coming from Districts is harmful because it is used by forces who want to eliminate our stable “defined benefits” and convert to “defined contribution” plans.

Karen Yamamoto, appointed “Retired” Educator to the CalSTRS Board and a CTA/NEA-Retired Member, spoke to the committee about the “fiduciary responsibilities” of the trustees that include maintaining a viable CalSTRS Defined Benefit. She also said that, as a fiduciary, she “must make decisions based on the best interest of the fund, its members, and beneficiaries.

Dana Dillon, in her last report as a CalSTRS Board Member, gave an overview of the structure and function of the CalSTRS Board and a summary of who the system serves. She shared information on how CalSTRS is addressing global climate change with its “engagement strategies”. CalSTRS has “adopted a low carbon investment strategy in order to maintain a viable long-term and sustainable fund for generations of educators to come.”

Dana was thanked by the committee for her 18 years of service as a CalSTRS Board Member and congratulated on her upcoming retirement. Dana served as Chair of CalSTRS for many years and has been an invaluable resource and advocate for CTA/NEA-Retired and active CTA members. In December she will change her status from active CTA to CTA/NEA-Retired Member!

Ed Foglia, CTA/NEA-Retired Director, reported on the CalSTRS Supplemental Maintenance Account (SBMA). This fund has a balance that has grown significantly over the years and is intended to be used to maintain the “buying power” of the members. There will be further discussions on this at future meetings.

As CTA/NEA-Retired President I reported that CTA/NEA-Retired is firmly in support of the “Schools and Communities First” campaign. They will be providing talking points of what this initiative “will do and won’t do” dispelling the misinformation that is being targeted to seniors. I also announced that a CTA/NEA-Retired “CalSTRS Cadre” has been formed to field questions regarding CalSTRS programs and issues.

Dana Dillon addressed the CTA Retirement Committee for the last time as a member of the CalSTRS Board. She has served on that Board since her election by members in 2003, is its longest serving Board Member and is nationally recognized as an expert on public pension retirement systems. For most of that time she was Chair or Vice Chair and has always been an invaluable resource and advocate for CTA’s retired and active members. Dana is an elementary teacher in Weed, California and has served on the Boards of Directors of both CTA and NEA. CTA/NEA-Retired thanks Dana for her for her outstanding service, congratulates her on her retirement and welcomes her to CTA/NEA-Retired.
REGISTRATION IS NOW OPEN!!!!
REGISTER NOW @ www.ctago.org

16th ANNUAL
CTA/NEA-RETIRED ISSUES CONFERENCE
February 27 - 28, 2020
Marriott – Irvine

Come join us for the 16th 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.

"Retirement Security in Uncertain Times!"

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 and CTA’s “Campaign 2020”

🔍 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 GPO/WEP)

🔍 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!

E. Toby Boyd – CTA President
Mary Kusler – Senior Director - NEA Center for Advocacy
Jack Ehnes – CalSTRS - Chief Executive Officer
And more!

Reception Thursday Evening, February 27
Come and meet other participants and have some great snacks!
Registration cost is $100.00

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

Hotel Group Rate: $129+tax/night for single or double
Hotel Cut Off: Feb. 12, 2020 (or until rooms sell out)
C T A/NEA-Retired’s eighteen delegates elected to the 2019 NEA Representative Assembly joined more than 6,000 delegates from across the nation to participate in a very busy seven days in Houston, TX. The theme of this RA was Our Democracy. Our Responsibility. Our time! On the 4th of July, NEA President Lily Eskelsen Garcia opened the annual meeting by talking about things we may have taken for granted that we can no longer. She said, “I’ve taken it for granted that in an open, democratic society the moral arc of the universe would always bend towards justice; that our country would keep finding ways to be more inclusive of folks who had been excluded; that we’d be looking for ways to give opportunities to folks who had so little; that we’d see more ways to appreciate our diversity of cultures and languages and races and our LGBTQ communities.” And then she asked delegates to stand if they have personally stood up for their students and their profession this year by marching, rallying, or carrying a picket sign.

Lily shared that last fall over 1,000 educators were elected to local, state, and federal offices across the country including Jahana Hayes, the first African American woman to ever represent Connecticut in Congress and she is also a former National Teacher of the Year. She went on to say that electing a new U. S. president in November 2020 should be a priority of anyone who cares about public education. She added that the current President has disqualified himself many times but most particularly on education issues by putting the least qualified person to ever hold a cabinet position in charge of protecting children’s access to quality, equitable public education. Lily added, “We will use our collective power to listen and learn and teach and reach and engage and organize and convince. . .” “Political action isn’t subversive. It’s the essence of democracy. Showing up informed and engaged; prepared to make a difference is exactly what democracy looks like.”

NEA President Lily Eskelsen Garcia,
July 4, 2019

“Political action isn’t subversive. It’s the essence of democracy. Showing up informed and engaged; prepared to make a difference is exactly what democracy looks like.”

Showing up informed and engaged; prepared to make a difference is exactly what democracy looks like.” She urged delegates to go to StrongPublicSchools.org to see the candidates and their positions side by side. (A full text of all 2019 RA speeches is available at https://ra.nea.org/speech/2019.)

We also heard the final address by outgoing NEA Executive Director John Stocks who spoke about the success of our nationwide #RedforEd movement which calls upon lawmakers to reinvest in public education and has resulted in elected public education defenders, including a record number of educators, women and people of color. He urged continued activism. “In these perilous times, as children are incarcerated on our border, as our free press is attacked, as voter suppression laws are passed, as state and federal courts rule against the rights of LGBTQ people, unions and affirmative action, and as gun violence rends our communities, our democracy is under threat,” warned Stocks. He concluded by saying, “Let’s be perfectly honest: an educator can do more for our democracy in five minutes than some lawmakers can do over their entire career.”

Perhaps the highlight of the Representative Assembly for many of us was the opportunity to listen to ten presidential hopefuls who attended, individually sat with President Eskelsen Garcia on the stage and were asked questions submitted by NEA members. The topics included education funding, privatization, testing, school safety, and student debt. Those attending were former Vice President Joe Biden, former HUD Secretary Julian Castro, Mayor Bill de Blasio, Sen. Kamala Harris, Gov. Jay Inslee, Sen. Amy Klobuchar, Rep. Tim Ryan, former Rep. Beto O’Rourke, Sen. Bernie Sanders, and Sen. Elizabeth Warren.

In addition to listening to speeches from National Teacher of the Year Rodney Robinson, National ESP of the Year Matthew Powell and David Schneider, Higher Educator of the Year, we were able to squeeze in four full days (7:15 am to 8:00 pm) discussing and voting on our Legislative Platform, changes to NEA Resolutions, and, everybody’s favorite, New Business Items (NBIs). NBIs set the course for what we want to see accomplished by NEA in the coming year. This year 60 NBIs were adopted out of 160 submitted.

California is especially proud that CTA member Robert Rodriguez was re-elected to a two-year term on NEA’s Executive Committee which is the Association’s highest-level governing body. Robert is a special education teacher from San Bernardino and a champion for diversity and LGBTQ rights in schools.

2019 NEA REPRESENTATIVE ASSEMBLY DELEGATES LOOK AHEAD TO 2020 ELECTIONS

By Bonnie Shatun, District 3 Director

NOMINATIONS ARE OPEN

2020 ELLEN LOGUE WHO (WE HONOR OURS) AWARD

Annually, CTA/NEA-Retired honors one member who has continued to be active in their retirement by exhibiting leadership in the Association, in public education and in the community. The recipient will be recognized at our General Membership Meeting at the conclusion of the 16th Annual CTA/NEA-Retired Issues Conference to be held on Feb. 27 – 28 at the Irvine Marriott.

Past winners of the award are:

- 2019 – Jim Burfeind
- 2018 – Robert “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. If you would prefer to receive the form in the mail, please call CTA/NEA-Retired at 650/552.5439 or email CTA-Retired@cta.org

Deadline for submission is Friday, January 24, 2020
ON-LINE/ELECTRONIC VOTING IS COMING
DON’T MISS OUT ON YOUR OPPORTUNITY TO VOTE!

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 have decided to move to electronic/online voting beginning with our Spring 2020 NEA-Representative Assembly/NEA-Retired Annual Meeting Delegate Election, the Election of CTA/NEA-Retired Officers and the Special Election to filled the unexpired term of Region IV Director/State Council Rep.

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. MEMBERS will be mailed a postcard with election information and voting preference.

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 Nessa Connor
1705 Murchison Drive, Burlingame CA 95814

Or Please Email your response to: CTA-Retired@cta.org
Or Please Phone in your response to: (650) 552-5439
REMEMBERING PAT RYAN

By Debra Sheehan, CTA-R Liaison to Central Coast Counties, CTA Women’s Caucus Secretary and the Retired Coordinator for the NEA Women’s Caucus

Our friend and colleague, Pat Ryan, passed away this past Fall. She was a tireless, enthusiastic advocate for students and teachers. Pat was very involved in her local chapter in Compton, was an active member of CTA/NEA-Retired and served as our Liaison and Board Member for CARA (California Alliance of Retired Americans). She has been a dedicated member of the CTA Women’s Caucus and was the Caucus treasurer for over 20 years.

I am grateful to Pat for the 11 years she mentored me as the CTA Women’s Caucus Secretary. I will miss her support and encouragement. We will remember her staffing the Women’s Caucus table at CTA and NEA meetings signing up new members or collecting donations of purses or supplies for women and girls in need. Her leadership and example of commitment will be missed by those whose lives she has touched.

Wildfires: Help from CTA

CTA’s Disaster Relief Fund assists Retired Members in need!!!

Have you been affected by the Kincade Fire, Tick Fire, Hill Fire or one of many other wildfires devastating California? CTA’s Disaster Relief Fund provides financial assistance grants for CTA members and CTA/NEA-Retired members who have suffered significant losses from fires and other disasters. The DRF is a separate, special fund just for members. It is funded by voluntary contributions from CTA members, and through CTA fund-raising drives throughout the year.

For details and to apply, contact your local CTA Office for forms, information, help to apply, or see ctamemberbenefits.org/drf