NOTES FROM THE PRESIDENT

He’s baaaack ... with a vengeance!!!: Former Mayor of San Jose Chuck Reed promised that he would return with a new pension reform initiative, and he certainly has. This one is called the Voter Empowerment Act of 2016 which is even worse than the last! See the Retirement Report on page 5 for more details. Aside from not signing the new initiative petition, we encourage you to picket the signature gatherers and VOTE AGAINST it, if it makes it to the ballot.

Notice to Lifetime Pre-Retired Members of CTA/NEA-Retired: If you are retiring this year, you must contact CTA Membership - via phone at 650-552-5278 or via email at membership@cta.org - in order to transfer from Active to Retired status. If you remain on the Pre-Retired list you won’t be able to vote or run for office.

New and greatly improved website: If you bookmarked our CTA/NEA-Retired website in the distant past, you may need to delete it and re-enter “cta.org/retired” for our much more expanded version. You will find sections on current and former newsletters, local retired chapter information, Bylaws and Standing Rules, the Social Security offsets, member benefits and so MUCH more. A new section that is very informative contains PowerPoint presentations and other materials from our 11th Annual Retired Issues Conference workshops.

SPECIAL ELECTION ALERT!!

Because of the untimely passing of Suzanne Barkworth, the CTA/NEA-Retired Region I Director’s Seat will become vacant on June 26th. At the June 5, 2015 Board Meeting, as provided for in our Bylaws and Standing Rules, the CTA/NEA-Retired Board of Directors unanimously voted to call a Special Election to be held immediately to fill this vacancy.

Notification letters for eligible Region I members to nominate themselves for the position were recently sent. Ballots are scheduled to be printed and mailed by the mid part of July to ALL CTA/NEA-Retired members. Completed ballots must be received no later than 5:00pm on Friday, August 14th.

It is the Board’s goal to fill this position in time for the Director to take his/her CTA State Council Seat by the first Council meeting in October. The person elected will serve until the next Directorial Election in 2018.

WATCH YOUR MAIL FOR THE ELECTION MATERIALS AND BALLOTS!

GOVERNOR BROWN NEEDS TO HEAR FROM US!

First, we would like to thank the Governor for his commitment to funding public education as demonstrated in the recent budget agreement. Now, let’s remind him three and a half years have passed since a retired member sat on the CalSTRS Board of Directors.

Urge the Governor to fill the Retired seat on the CalSTRS Board without delay!

You can contact the Governor by:
• Email - www.gov.ca.gov Click CONTACT on the home page
• Phone - (916) 445-2841
• Fax - (916) 558-3160
• Write - Governor Jerry Brown c/o State Capitol, Suite 1173, Sacramento, CA 95814

CALSTRS RELEASES INAUGURAL SUSTAINABILITY REPORT - THE NEXT 100 YEARS

by Ed Foglia, District 2 Representative

This report is an overview of the CalSTRS comprehensive initiatives in retirement security for its members, investment impact on the fund, business practices of the organization and the environmental efforts consistent with the Global Reporting Initiative.

Continued on page 3
CTA/NEA-Retired Board of Directors
Meeting - June 5, 2015

Action Items:
- Approved:
  - Northbay-Retired Bylaw amendments
  - Special Election to fill the vacancy of Region I Board of Directors
    unfortunately initiated by the death of Sue Barkworth
  - Creation of Community Engagement Chair position (President Ritchie
    subsequently appointed Board Member Harris Kight-Moore to this
    position)
  - Continuation of the $50/meeting reimbursement program to compensate
    CTA/NEA-Retired members who attend the CTA Caucus at statewide
    political party meetings as voting members
- Recommended approval of the 2015-2016 CTA/NEA-Retired draft budget to
  membership. It was then passed at the CTA/NEA-Retired Annual Membership
  Meeting which immediately followed the Board Meeting.

Reports:
- The first steps in the focus areas for CTA Structure and Governance will be
  implemented beginning with the October 2015 State Council. The recommendations
  to restructure State Council are the result of data collected through the Appreciative
  Inquiry process conducted at last year’s October State Council. This change in how
  Council does business will enhance CTA’s progress along the path envisioned in the
  Strategic Plan.

Matters Pending:
- Action on a potential State Council NBI to effect a change in regulations requiring
  multiple fingerprinting for retirees who return to work/volunteer in schools or
  jurisdictions outside of their city and county of residence.

Information Items:
- The Sharilynn Gardella Russo Memorial Scholarship Selection Committee chose
  Monika Ifah and Jonathan Forfa as the 2015 scholarship recipients. Both Monika
  and Jonathan are enrolled in Speech & Language Pathologist/Speech and
  Language Pathology Assistants programs in accredited colleges/universities. They
  will receive their $1,000 scholarship award in ceremonies planned in the ALCOSTA
  SCC-Retired and Orange SCC-Retired chapters, respectively.
- Like us on Facebook: www.facebook.com/ctanearetired. Membership in Facebook is
  NOT required.
Members of the CTA/NEA-Retired Board of Directors attended the 2015 NEA-Retired Organizing Conference held in Atlanta, Georgia on March 24-26. The theme for this year’s conference was “Organize, Educate, and Lead” and was attended by more than 200 NEA affiliate retirees from all 50 states. Conference attendees were encouraged to strengthen their resolve to support public education and to become involved, within their state and local chapters, in organizing retirees in support of social justice issues. The program also included special activities to celebrate the 80th Anniversary of Social Security and the 50th Anniversary of Medicare.

Workshop sessions included information on investments, pension plans, protection from identity fraud, membership recruitment and how to help beginning teachers make a successful transition into the teaching profession. Legislative updates on Social Security, Medicare, the Affordable Care Act, the re-authorization of ESEA and the current attacks on public employee pension programs were also presented. Among the skill sessions offered were topics devoted to developing intergenerational mentoring programs as well as organizing for power and influence in support of public education at the national, state, and local levels. An organizing activity, conducted on the final day, engaged retirees in creating a blueprint and practicing the skills needed to expand retiree membership in order to build a base to increase power and influence in their home states. The CTA/NEA-Retired Board of Directors plan to incorporate the information presented at this conference into the 2016 association goals and organizing strategies.

Next year’s conference is scheduled for March 21-24 in San Diego.

HIGHLIGHTS FROM THE NEA-RETIRED ORGANIZING CONFERENCE

by Frank Tarantino, Secretary-Treasurer

The theme for this year’s conference was “Organize, Educate, and Lead”.

CALSTRS RELEASES INAUGURAL SUSTAINABILITY REPORT-THE NEXT 100 YEARS

Continued from page 1

CalSTRS Mission and Vision are to secure the financial future and sustain the trust of California’s educators with a protected retirement for its members.

The Organizational Profile -
- CalSTRS is the largest educator-only pension fund in the world with 879,329 beneficiaries.
- CalSTRS total net worth = $190.5 billion.
- $11.9 billion in annual benefits are paid out by the fund.
- Investment portfolio rate of return for the past 20 years = 8.4%.
- The 2013-2014 annual rate of return on investments was 18.7%.
- Employee personnel services costs are $104,106,000 for 989 employees-office are located in West Sacramento, Glendale, Santa Clara and Irvine.

From July 1, 2013 - June 30, 2014 there were 10,736 retirements with an average monthly Member-Only benefit of $3,939. The median age at retirement is 62.3 with 24.7 service credits in the profession.

CalSTRS Sustainability Vision advances practices that promote long-term value creation, responsible investment strategies, stewardship of our natural resources and engagement with the stakeholder community. The guiding beliefs are to shape the organization’s environment, social and governance actions, and interactions with its stakeholders. CalSTRS responsibly manages risk for the long-term financial strength of CalSTRS, to the benefit of its members, stakeholders and the environment.

For the past 11 years, CalSTRS has conducted the Annual Member Satisfaction Survey every January. A total of 23,958 surveys were sent via email to a random sample of retired members. Approximately 5% of the recipients responded. Customer service received high levels of satisfaction – 70% or more with staff; 66% or more with service; 71 % or more with CalSTRS websites.

The complete Sustainability Report – The Next 100 Years can be found at calstrs.com/news.
last fall, the CTA/NEA-Retired Board began meeting with Student CTA (SCTA) with the goal of supporting each other in various activities. The Board met twice with the SCTA Board and on April 25th Marlene Giles (South County-Retired), Alen Ritchie (CTA/NEA-Retired President) and myself joined SCTA members for their annual Representative Assembly held in San Diego. The retirees were invited to participate in a “scavenger hunt” ice breaker activity. SCTA members were divided into teams and asked to collect information on a number of topics of interest from various individuals “hidden” throughout the hotel. The retirees were asked to share information on teaching conditions prior to collective bargaining, personal views on NCLB, high stakes testing, Common Core Standards and Unionism. It was a valuable experience enjoyed by all.

The CTA/NEA-Retired Board met again with SCTA at June’s CTA State Council and is now in the process of deciding where to go with our new relationship. We have asked our local retired associations if they would be interested in working with students where there is an active SCTA chapter and most have responded positively. Some suggested activities have been: mentoring, community projects, political action, providing union history, helping with member recruitment and establishing big brother/sister relationships at the NEA RA.

CTA/NEA-RETIRED LEADERS PARTICIPATE IN STUDENT CTA REPRESENTATIVE ASSEMBLY

by Frank Tarantino, Secretary-Treasurer

As part of the Student CTA Representative Assembly, Marlene Giles from South County-Retired, (picture on the left) and CTA/NEA-Retired President Alen Ritchie (picture on the right) talk with student members as part of the scavenger hunt where groups of SCTA members asked Retired members about the way things were in education or about CTA/NEA-Retired.

At CTA State Council in June, the CTA/NEA-Retired Board of Directors met again with the leaders of Student CTA to explore and plan the many ways our organizations can work together.

CTA RETIREMENT COMMITTEE REPORT: THE GOOD NEWS AND THE BAD

by Bonnie Shatun, District 3 Representative

CTA’s Retirement Committee held their regular meeting as part of CTA’s June State Council Meeting. The Committee was given updates on bills currently in the Legislature which relate to retirement issues. Here are two additional items discussed:

The Good:
The Committee celebrated the news that on June 5 CalSTRS announced that an agreement had been reached that finally ends an investment in firearms manufacturing by cashing out holdings in Remington Outdoor. CalSTRS began the divestment process two years ago after CTA and other education groups pushed for such divestment, an effort that had already resulted in the sell off of holdings in weapons companies Smith & Wesson and Storm Ruger. This took time because, as I wrote in our last issue, CalSTRS takes divestment discussions very seriously and has a policy based on a list of principles to insure that actions have limited impact on the health of the fund.

In a press release, CTA President Dean Vogel said, “As educators we care deeply about the safety and well-being of our students. We are extremely pleased that our efforts to keep our students safe have helped eliminate all ties between STRS and these manufacturers of dangerous weaponry illegal in our state. While schools continue to be among the safest places for students and educators to be, this divestment will ensure that educators and their pension system are not associated with weapons that place communities, and in rare but tragic cases schools, at greater risk.”

The Bad:
The Committee received information about a possible initiative to “reform” public pensions that is in the early stages of being filed for the 2016 ballot. The sponsors are Chuck Reed, former mayor of San Jose, and Carl DeMaio, former City Councilman in San Diego. They both successfully passed local measures in their respective cities to reduce public pensions and/or change new hires to a 401(k) type plan.

CTA is in the process of carefully analyzing the proposed ballot measure and will be getting information out to us as soon as they have. It is important that we remind friends and family not to sign any proposed initiatives that they encounter from signature gatherers.
South County Retired members Marlene Giles (standing) and (from left) Lasha Allen, Nancy Potts and Georgia Tate enjoyed visiting at their annual holiday brunch.

On Saturday, May 16th, Stanislaus CTA/NEA-R President Bob McDonough and Vice President Don Rowe walked and provided information to community members as part of the CTA Stanislaus Relay for Life Team.

SOUTH COUNTY TEACHERS UNITED CTA/NEA-RETIRED
by Sara Wood, South County President

South County Teachers United CTA/NEA-Retired was chartered as an affiliate in 2007. The majority of our members come from the 6 active associations in the SCTU UniServ (Chula Vista Educators, Southwest Teachers Assn, San Ysidro Education Assn, Sweetwater Education Assn, Sweetwater C & G Assn, National City Elementary Teachers Assn), however, all CTA retired members are welcome. We were organized to support our active colleagues in their work to retain the STRS Defined Benefit, support the elimination of Social Security Offsets, to protect Social Security and Medicare, and to challenge the attacks on public schools and our pension system.

We have five general membership meetings a year beginning in September and ending in May. We invite speakers to share information on issues of interest to retirees. We have had speakers from STRS, HICAP, CTA and NEA Member Benefits, Identity Theft organizers as well as members of our CTA/NEA-Retired Board of Directors. We are fortunate to use the SCTU UniServ office in Chula Vista as a meeting space. It allows us to invite the presidents of the 6 active associations to share any issues or concerns that they are dealing with and allows SCTU-R to volunteer where there is a need. We have attended local school board meetings, joined picket lines, worked polls, counted ballots, phone banked, walked precincts and had BBQs for our active colleagues. To further grow the relationship between the retired and active members of SCTU, we have been invited to attend the SCTU Board meetings. On months that we don’t have a meeting planned, our social committee plans outings to museums, movies, plays, gardens as well as our annual Holiday Brunch.

Our ongoing goals are to grow the membership of CTA/NEA-Retired and to educate our members on issues that affect our retirees and CTA. Rounding out the SCTU-R leadership team are Vice President Merrill Wood, Secretary Marijane Moon, Treasurer Frank Tarantino and Social Committee Chair Marlene Giles. Questions can be directed to sewwood@cox.net.

CARA UPDATE
by Pat Ryan, CARA Representative

The California Alliance for Retired Americans (CARA) is a statewide nonprofit organization that unites retired workers and community groups for the purpose of educating and informing its membership, the public and elected officials about issues that affect the well-being of California’s older adults. CARA advocates met recently in Sacramento for a lobby day. Members divided into teams and visited legislators to talk about the state budget, Social Security, Medicare and other issues that are important for retirees and the Labor movement. CARA is also supporting the Medicare rallies to be held throughout the state on July 30. The goals of the rallies are to protect, improve and expand Medicare and to celebrate its 50 years as a highly successful social program.

As members of CTA/NEA-Retired you are also members of CARA, and you are invited to attend the CARA State Convention. It will be held October 19-20, 2015 at the Ontario Doubletree-Hilton. The registration fee is $125 and covers materials, lunch and dinner on October 19 and breakfast on October 20. There will be presentations and panel discussions on a variety of issues of interest to seniors including Social Security, Health Care, Medicare legislation. There will be an opportunity to elect board members, ask questions and vote on resolutions. For further information about the Medicare rallies or the Convention visit the CARA website at www.CaliforniaAlliance.org.
Suzanne Barkworth, recently elected to the CTA/NEA-Retired Board of Directors for Region I, passed away on Wednesday, May 27, 2015, after suffering sudden and unexpected heart failure. “Sue” or “Suzie” as she was often called, was a dedicated teacher who taught primary grades for 40 years in the San Jose Unified School District. Early in her career she became involved in her local chapter, San Jose Teachers Association (SJTA), and soon after became more involved in CTA. She took what she learned back to her colleagues by presenting many teacher trainings. She also became interested in education legislation and politics. Eventually, Sue’s involvement and activism led to a position on the SJTA’s Executive Board and as a SJTA representative for CTA State Council. Later she was elected to serve several terms on the CTA/ABC Committee and CTA’s Political Action Committee.

After retiring in 2009, Sue remained active in her local retired chapter and was soon elected president of CTA Santa Clara-Retired. In March 2015, she ran and was elected to the CTA/NEA-Retired Board representing Region I. She also was elected as a delegate to the NEA-Retired Annual Meeting and the NEA Representative Assembly representing CTA and CTA/NEA-Retired in Orlando this summer. Sue was an active member of Delta Kappa Gamma Society International for Key Women Educators.

Sue was a caring, loving person who gave of herself in very meaningful ways to so many individuals and organizations. She was well-loved by students, parents, and teaching and union colleagues, many of whom continued to stay in touch long after she retired. Sue Barkworth will be greatly missed by family and friends. A celebration of her inspiring and loving life was held on June 20th at the CTA San Jose Regional Resource Center.

In lieu of flowers, please send donations in memory of Suzanne Barkworth to the Monterey Bay Aquarium or the San Jose Tech Museum.