



# THE CONDUIT

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June-July, 2013

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**Editor's note:** There are many photos in this issue for you to enjoy. To get a clearer view, go online to <http://azedretired.com/Documents/Conduit/Conduit%20June-July%202013.pdf>

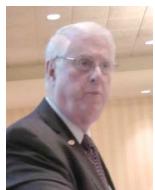


## AEA Retired Calendar

June 28-July 7 : NEA-R Annual Meeting and NEA RA in Atlanta, GA



September 10: AEA-Retired Board Meeting



September 11: AEA-Retired Committee day and Planning Meeting

Attendees were treated to speeches by two of their presidents in addition to AEA-R President **Linda Somo**. NEA President and Paradise Valley teacher **Dennis Van Roekel** gave us a preview of his speech to the AEA Delegate Assembly. AEA President **Andrew Morrill** also stopped by and offered his personal gratitude for the work AEA-R does to make the organization strong and mindful of our past.

October 7: Valleywide Chapters Meeting, AEA Bldg., 11-2

Next up was the always-popular AEA Chief Lobbyist **Jennifer Loredo**. Jennifer gave a wonderful recap of this year's legislative sessions, providing insight on bills designed for both education and retirement issues. She took the time to answer our members' questions. Jennifer and husband John are expecting a child in August. Your colleagues presented her with a basket of baby items which they brought to the annual meeting and cash we collected for her to buy other needed items. Jennifer was visibly touched, and expressed gratitude to all of the baby's "AEA Grandparents" for their generosity.

October 11: AEA-Retired Board Meeting



## ***AEA-Retired Annual Meeting a grand success: biggest attendance ever, five fantastic speakers, Les Reynolds Award, officer and board elections, a great lunch, record fund raising, and social hour marked our 25th Anniversary***

April 26 was a milestone day as AEA-Retired celebrated 25 years of dedicated service to retired public education employees. A record 130 of our members travelled to Mesa to take part in our Annual Meeting, and they were not disappointed (see photos on page 4).

The roster of speakers was spectacular, and all received high praise on attendees' evaluations.

Kicking off the speakers was former Superintendent of Public Instruction **Carolyn Warner**. As always, her speech was inspiring and liberally sprinkled with her trademark humor. Carolyn finished with a poem she had written. It appears on page 7.

Our final guest speaker was **Paul Matson**, Executive Director of the Arizona State Retirement System. Paul brought us up to date on the health of the system, what changes may be in the future, and he was kind enough to answer all questions from the group.



This year's **Les Reynolds Award** was won by **Kathy Campbell**, a longtime member and past president of AEA-R. The award was presented by **Connie Wittig** a past Reynolds Award winner. We were treated to a great highlight movie which was put together by outgoing AEA-R Secretary **Julie Horwin**.



Delegates elected **Susan Sain** as our new secretary. We also elected board members **Shirley Boswell, Mary Ann Goodluck, Julie Horwin, Danny Barlow, Judy Moy, and Susan Sommer**. **Liz Hendrickson** was also appointed to fill Judy Moy's term, since Judy was reelected to the AEA Board.

At the May, 2013 AEA-Retired Executive Board meeting, **Linda Thielen** was appointed to fill the unexpired term of Susan Sain.

(Continued on Page 2, bottom)

# ASRS UPDATE BY STEVE RAMOS

## ASRS BREAKS RECORDS WHILE NEW ELECTED OFFICIALS WILL BE FORCED TO TRADE DB FOR DC PLAN

Good news! The Arizona State Retirement System is bouncing back from the economic depression and now holds more than \$30 billion in investment funds, setting a new record. Rates of return have been strong and predictions are that the fiscal year will end with a 15% or better return on investments this fiscal year. AEA-Retired members have not seen a Permanent Benefit Increase since 2005. The PBI is based on average returns over 10 years, so each good year added and bad year dropped off brings members closer to that next PBI.

The Arizona Legislature was still in session as of this writing, but the governor had signed most of the legislative initiatives sought by ASRS into law. AEA-Retired was not able to derail one of the bills; however, by working with ASRS to prevent fraud and identity theft we were able to get privacy protections for all members' personal information added to state law. These include Social Security numbers, bank account information, addresses, telephone numbers, e-mail addresses, medical records, health insurance information, beneficiary or survivor information, and disability information.

Still waiting for the governor's signature was HB 2608, which replaces the defined benefit Elected Official Retirement Plan (EORP) with a defined contribution plan for all elected officials who are elected or appointed on or after July 1, 2013. While AEA-Retired agrees that EORP was in need of reform, we believe its complete replacement is really a calculated step towards moving all of the state retirement plans to defined contribution plans. Under the new plan, elected officials will have a 401a account, professionally managed yet subject to the normal risks of the market. At retirement age members can receive a lump sum or convert their account into an annuity. Members must now contribute 8%; up from a fixed 7% they paid before the 2010 reforms. Employers, who used to be responsible for funding the rest of the plan with a contribution of at least 10%, now will only contribute 6% towards the employees defined contribution account. The bad news for the state is that they cannot just ignore the unfunded accrued liabilities created by the old plan, so each employer is required to make total contributions of 23.5% of compensation until that liability is paid off. Also, the legislature must contribute to the pay off with an appropriation of \$5 million from the state general fund each year from 2013 to 2043.

Please do not hesitate to contact your state senators and representatives and tell them any plan to move ASRS to a defined contribution plan is the equivalent of cutting educators' salaries and benefits and endangers the solvency of Arizona's best managed and most successful retirement plan.



Steve Ramos



### *Annual Meeting, Continued from page 1*

It was the general consensus that the lunch was outstanding and even better than last year's.

And finally, no Annual Meeting would be complete without the legendary social hour following the close of business. As always, it was well attended, and a good time was had by all. We hope to see YOU there next year. Start planning now.

A huge highlight of the meeting was the fundraising for the AEA and NEA Funds for Children and Public Education. Your members in attendance shattered the old records for both funds, raising an eye-popping combined total of **\$9,701!!!** With very important state and federal elections coming up next year, we'd like all of our members to consider contributions to help pro-education, and pro-retiree candidates.



A huge vote of thanks goes to Annual Meeting Chair **Suzan Austin** and her committee member, **AnnJi Craig Wooten**. They made it all go smoothly.

## PRESIDENT'S MESSAGE



**President Linda Somo**

Many years ago when I was a first – year English teacher at a high school in Ohio, I used a short story entitled “The Fun They Had” with my junior English class. The story was told from the point of view of a young student who was lamenting the loss of the type of education from “the good old days” when students actually went to a school and were able to learn and interact with other students. The student in the story “attended” school at home on his TV and never saw other students. Since this was long before the days of personal computers and the internet, it was considered just a piece of science fiction to me and my students, but we all agreed that this type of education would be a terrible loss.

I was reminded of that story the other day as I heard a commercial for a school that was completely online. It made me wonder, is this where public education in America is headed? It would certainly find favor with politicians who are constantly cutting funding to education, since there would no longer be a need for schools or buildings of any kind. Plus, we could get by with a handful of teachers and no support staff. We wouldn’t need books, materials, or anything other than computers. And, of course, there would be no more pesky unions to advocate for kids and quality public education.

For some politicians, this would be a dream come true. Just think of all the money that could then be diverted to tax cuts for businesses and the wealthy. It wouldn’t matter to them that

students would be missing out on one of the most important functions of public schools: teaching students to function effectively in a diverse society and learning to deal well with different points of view.

If this is the future of public education in America, then I grieve for future generations, I grieve for our society, and I grieve for our democracy. Our founding fathers knew the importance of public education for the preservation of our democracy. It was Thomas Jefferson who wrote, "Those who expect to be both ignorant and free, expect what never was and never will be." Online education alone may provide factual information, but the other important components of a truly “public” education would be missing, and our democracy would not survive. Those of us who devoted our lives to public education know this to be true.

The “magic” of education that takes place in a classroom with a qualified, devoted teacher, and the live interaction of students cannot be duplicated with a mere internet course. It’s important that we keep reminding our elected officials of that, lest they tend to forget. We need to keep telling everyone of the importance of quality public education for every student. As retirees, we can lead the way and continue that fight. Otherwise, we might someday find ourselves telling future generations about “the fun they used to have” in real schools and about our lost democracy.

## A Good Reason to Join AEA-Retired



**Liz Hendrickson**

**Liz Hendrickson** and her husband, Gary, graduates of the University of North Dakota, moved to Arizona in 1970. Gary attended Arizona State University Law School and Liz taught in South Phoenix. They decided to stay. Gary opened his own practice and they have rarely missed the cold.

Liz left South Phoenix in 1975 to teach in the tiny (population 2,300) town of Gilbert. Daughter Alexandra was born in 1977, and son Christopher in 1984. In 1985 she decided to stay home with her kids. In 1993 she was offered a position at her neighborhood school, Robson. She spent the last six years before retiring at Irving Elementary. This was where she became involved with

While at Irving, Liz began to write regular opinion columns for the *Arizona Republic*. I was through one of those columns that she heard from AEA-Retired President, Linda Somo. Linda encouraged Liz to attend the AEA-Retired meetings, and who can say “no” to Linda?

Liz admits to being addicted to books. She will also be more than happy to show you pictures of her grandchildren in the Halloween costumes she made for them. She and Gary no longer have beagles, having had a total of 13 over the last 35 years. They are down to two cats.

*Want to be more active/involved in YOUR Association? We encourage you to volunteer to serve on an AEA-Retired Committee. Call President Linda Somo at 602.574.1473, or drop her an e-mail at lsomo@cox.net We need your talents.*

## AEA-R members well represented in Orlando for the NEA-Retired Organizing Conference; three AEA-R members make presentations at the March 23 breakout sessions

From March 22-24, Orlando, Florida, was the site of this year's National Education Association Retired Organizing Conference. AEA-Retired was well represented by attendees **AEA-Retired President Linda Somo**, **NEA Past President Barbara Matteson**, **Vice President Frank Bing**, **Treasurer Jean Stephenson**, **Secretary Julie Horwin**, **Past President Kathy Campbell**, **NEA Director John Campbell**, **AEA Director Judy Moy**, and members **Nancy Putman**, **Gary Mehok**, **Carmen Peters**, and **Janie Hydrick**.

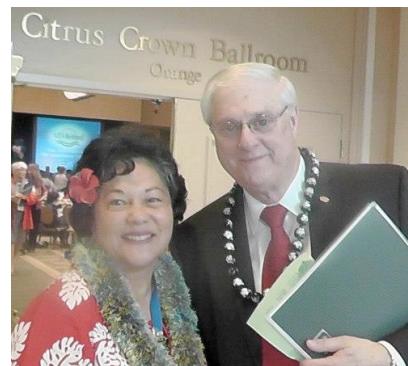
We heard from **NEA President (and Paradise Valley EA member) Dennis Van Rockel**, **NEA VP Lily Eskelsen**, and **NEA Treasurer Becky Pringle**.

Breakout sessions focusing on all types of organizing within the states took place on the second day of the conference. Three of our members made presentations on that day. **Julie Horwin** conducted her session on organizing state associations' social media usage. As always, her presentation was well received.

**Janie Hydrick** conducted a follow up to the morning plenary session on the importance of organizing and recruitment. Julie and Janie both received great evaluations from participants.

The third AEA-R member who helped conduct a session was **Frank Bing**, who presented in the morning plenary session with NEA's **Bob Egan** and Arizona EA Organizational Consultant **Paula Manizsko**. They took all participants through an introduction to the use of the COG wheel, a device to help associations such as AEA plan organizing activities. The elements are Listen, Plan, Act, Evaluate, and they occur in a continuing sequence.

On the final day, as we all prepared to leave for the airport, Orlando was struck by a small hurricane! We were all herded from the lobby into the hotel bar to get us away from windows and doors. It was pretty exciting, and just a little scary, but it ended fairly quickly, and our adventure in Orlando ended in an unexpected way (including flight delays caused by the hurricane).



## News You Can Use

### Did you know?

As a member of Arizona Education Association– Retired, you are automatically a member of the Arizona Alliance for Retired Americans and its parent affiliate, the

American Alliance for Retired Americans. The alliances are a rich source of information about retirement issues important to us all, and they lobby in DC and Arizona to make sure legislators are informed of retirees' issues.

Here is an article from the May 31 issue of *AARA Friday Updates*. It contains information we could all use when contacting our federal and state legislators. There is an internet link at the end of the article if you'd like to read more.



### Trustees Reports: Social Security Steady, Medicare

**Financial Outlook Improved** The Social Security and Medicare Trustees issued their annual reports on the state of the two programs' finances today. Social Security, according to its Trustees, has a \$2.7 trillion surplus, enough to fully meet the demands of a growing retiree cohort through 2033 – the same as last year. With no action from Congress, it would cover most benefits through 2087. The Trustees report for Medicare noted that its Trust Fund, which covers hospital care, can fully pay benefits through 2026 – two years later than forecast last year. The Medicare trustees report shows reduced cost growth; this is further proof in many experts' eyes that health care reform is working for seniors.

AFL-CIO President **Richard Trumka** and Alliance Executive Director **Edward Coyle** issued a joint statement about the reports. "We must call out those who will try to misuse today's report as political cover for unwarranted and ill-advised benefit cuts, like switching to the 'chained CPI' to calculate Social Security's annual cost of living increase (COLA)," Mr. Trumka and Mr. Coyle said. To read their full statement, go to <http://tinyurl.com/k6qnk3u>

*Have a restful, relaxing, and safe summer.  
We'll be back in September with your next Conduit.*

"A perfect summer day is when the sun is shining, the breeze is blowing, the birds are singing, and the lawn mower is broken."

- James Dent



### More Alliance News

On May 29 four AARA leaders met with Arizona Congressman Raul Grijalva to present him with a *Retiree Hero Award* for scoring 100% on the Alliance Voting Record. AEA-R member and NEA-R past president Barbara Matteson was in that group.



If you'd like to view the Alliance's Congressional voting record scores to see how your senators and representatives voted for retiree issues, go to <http://www.retiredamericans.org/issues/congressional-voting-record>



\$100 e-mail winners for 2013

**Ed Messing  
Judye Byrum**

You could be the next winner! Make sure you correct your e-mail address with AEA-R if it has changed. This will ensure that you receive important communications.

**Send your email address to jhorwin@mindspring.com**  
Remember, AEA, AEA-Retired does nothing with your email address except to communicate AEA and

**AEA-Retired Annual Meeting and AEA-Delegate Assembly**  
**April 28-29, Mesa, Arizona**



## The New American Dream ©

Give me your hungry children, your sick children,  
Your homeless and abused children.

Give me your children who need love  
As badly as they need learning.

Give me your children who have talents and gifts  
and skills.

Give me your children who have none.

Give them all to me, in whatever form they come,  
and the  
People within these walls will help

Give you the doctors and the engineers and the  
scientists and the lawyers and the ministers and  
the teachers of tomorrow.

We will give you the mothers and the fathers, the  
thinkers and the builders, the artists and the  
dreamers.

We will give you the nation of tomorrow.

We will give you the future of Arizona.

We will give you the American Dream.

**Carolyn Warner**



Carolyn Warner served for 12 years as Arizona's elected State Superintendent of Public Instruction. In 1986 she was her party's nominee for Governor of Arizona. She is founder and chairman of Corporate Education Consulting, Inc. She has been active for more than 3 decades on state & national levels as a respected and effective educational advocate and public policy leader. Carolyn is the author of four books, *Promoting Your School: Going Beyond PR*; *Everybody's House - the School House*; *The Words of Extraordinary Women*; and best-seller, *The Last Word: a Treasury of Women's Quotations*.



### ***AEA Retired stages successful Lobby Day at the Capitol***

On Wednesday, March 21, AEA-Retired members travelled from southern Arizona, northern Arizona, and Greater Phoenix for appointments with their legislators. They were met (mostly) with warmth, and some legislators took the time to eat lunch and take part in a panel discussion about education issues. AEA Lobbyist **Jennifer Loredo** briefed attendees on current education and retirement bills and provided materials helpful to them when conversing with their representatives and senators, including information about the budget. After lunch with the legislators, individuals attended the Senate or the House floor sessions where many were recognized from the floor by legislators.

In the article on page 1, we mentioned that **Carolyn Warner** wrapped up her Annual Meeting speech with a poem she had written. It appears above with her permission.



### ***The Conduit***

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***The Conduit***  
Frank Bing -Editor  
Liz Hendrickson-Editor



EQUIPPING THE NEXT GENERATION OF TEACHERS

# Donate Your Extra Supplies & Materials

Spring clean & pay it forward to help eSWAG support new teachers.  
Donated items will be distributed at our first summer 2013 Educator's Bazaar to be held at Arizona Education Association for first year, brand new teachers only.

**eSWAG is collecting donations thru June 30, 2013**

**Monday-Friday, 8:30 am-5:00pm**

Items can be dropped off at the Arizona Education Association  
345 E. Palm Lane in Phoenix or contact us at [AEAsWAG@gmail.com](mailto:AEAsWAG@gmail.com)

**eSWAG**  
Educators Soaring With Aspiring Goals

For additional information, contact:  
Francis Stennis, AEA Staff | 602-407-2357  
AEAsWAG@gmail.com  
Eden Lewkowitz, eSWAG Chair

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## *AEA-Retired Chapter News*

Chapters are an attempt to bring AEA-Retired closer to members. All AEA-Retired members are eligible to join a chapter where they worked or currently live. Meetings usually include an information program, busi-ness meeting, lunch or dinner, and time for socializing with friends and colleagues. Anyone interested in forming a new chapter should contact Chapters Chairperson **Gary Mehok** at [LOJO40@cox.net](mailto:LOJO40@cox.net).

**Glendale/West Valley Chapter-** All members are welcome at our meetings. Glendale /West Valley meetings are at Iron Works Restaurant, 17233 N. 45th Avenue, Phoenix. For more on information on upcoming meeting dates, call **Susie Sommer** at 623-931-6209 or [ssommer114@aol.com](mailto:ssommer114@aol.com)

**Mesa / East Valley Chapter:** The next scheduled meeting is September 18 at 10:30 AM , at the Sunrise Bank Bldg., 63 E. Main Street in Mesa. Contact **Janie Hydrick** at [hydrick@aol.com](mailto:hydrick@aol.com) for details. The other meetings for next year are scheduled for November 13, January 8, March 12, and May 14. Please come and bring a friend.

**Greater Tucson Area Chapter:** The Chapter meets at 10 AM the 3rd Tuesday of the month from August through May. The meetings alternate between the AEA Southern Region Office and the TEA Office. Go to <http://www.azedretired.com/TUCSON/index.html> for more information, or contact **Chip Parsons** at [chipp@cox.net](mailto:chipp@cox.net)

**Phoenix Chapter:** Chapter meetings for next year are scheduled for November 16, January 28, March 25, and May 20. New location TBD. For information , contact **Barb Joseph** at (602) 765-0788 or [btjoseph@cox.net](mailto:btjoseph@cox.net).

**White Mountain Chapter:** Interested in reestablishing this chapter? For information about this, contact **Gary Mehok** at [LOJO40@cox.net](mailto:LOJO40@cox.net).

**Yavapai ( formerly Prescott) Chapter:** The Yavapai Chapter of AEA-Retired will meet this fall and winter at times and places TBD. Contact **Ted Coleman** at [tdashfork@azwildblue.com](mailto:tdashfork@azwildblue.com) for more information.

**Yuma Chapter:** Please contact **Gary Mehok** at [LOJO40@cox.net](mailto:LOJO40@cox.net) if you are interested in reestablishing this chapter.

**Scottsdale/Paradise Valley Chapter:** The Scottsdale/ PV Chapter meets at Macayo's on N. Scottsdale Rd. in Scottsdale. For information on dates and times contact **Suzan Austin** at (480) 947-2089 or visit <http://www.azedretired.com/SCOTTSDALE/index.html>. Everyone is welcome.

**Southeast Chapter:** Please contact **Cathy Milkie**, 520-366-5482 or [cmilkiec@aol.com](mailto:cmilkiec@aol.com) or **Sally Rosen**, 520-459-0430 or [azcatsally@aol.com](mailto:azcatsally@aol.com) for future meeting dates and locations. Everyone is welcome.

**Northern Arizona/ Rez Chapter:** Contact **Maryanne Goodluck** at [magoodluck55@yahoo.com](mailto:magoodluck55@yahoo.com) for information and future meeting dates. All are welcome at the meetings which are at the Thunderbird Lodge in Chinle. Contact Maryanne if you have suggestions for other meeting places.