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## Attendees identify their "Super Powers" at 31st AEA-Retired Annual Meeting in Scottsdale



The 31st Annual Meeting of the AEA-Retired featured outstanding guest speakers, a delicious luncheon, fun activities, the chance to win fabulous prizes, and the successful raising of funds for an important cause, the NEA Fund for Education which helps to elect friends of public education nationwide.

With a theme of "What's Your Superpower", 125 attendees were urged to identify and use their "superpowers" to protect our public pensions, Social Security, Medicare, Medicaid, and quality public education for all of Arizona's students.

**President Julie Horwin** provided opening remarks that identified many of these powers, such as voting, contributing monetarily and working in campaigns for candidates who believe in our values, talking to others about the importance of voting for friends of education, attending rallies, and showing up at the legislature (in person or electronically) when it counts. President Horwin also led the group through "table discussions" that helped to connect what we do at the state

level to NEA's priorities for quality public education.

**Political action activist Barbara Matteson** presented a recap of the past legislative session. She discussed the "highlights" and "lowlights" of what has transpired at the state capitol.

**ASRS Director Paul Matson** updated attendees on the Arizona State Retirement System. He stated that our state pension is one of the best funded, best managed state pensions in the nation, and consistently ranks in the top 10. Plus our healthcare provisions are almost 100% funded.

## Luci Messing honored as Les Reynolds Distinguished Senior Service Recipient.

Luci Messing was selected as this year's recipient of the Les Reynolds Distinguished Senior Service Award for her many years of service as AEA-Retired's Political Action Chairperson. **(Continued on page 5)**



## AEA-Retired Calendar

June 30-July 1—NEA Retired Annual Meeting, Houston, TX

July 3-7—NEA Representative Assembly, Houston, TX

September 10 —AEA-Retired Board Meeting, AEA Headquarters

September 11 —AEA-Retired Committee Day, AEA Headquarters

## ASRS UPDATE BY STEVE RAMOS



# ASRS members must remain united in pension reform fight!

AEA-Retired has begun a campaign to make all public employees aware of the latest threat to our ASRS Defined Benefit (DB) pension system. We lead this fight because we have benefited from a secure ASRS retirement. In order to take our message to our active colleagues and new hires, it is important to understand how ASRS has changed since many of us have retired.

In December 2018, the National Association of State Retirement Administrators issued a report detailing the changes to public pension plans nationwide. Stock market crashes in this century sharply reduced state and local pension fund asset values and due to this loss, pension costs increased. These higher costs hit state and local governments hard *"prompting changes to public pension plans and financing that were unprecedented in number, scope, and magnitude."*

The Arizona State Retirement System (ASRS) was not immune to the economic crisis and has also made significant reforms in the last decade designed to guarantee the solvency of the fund into the future. For many ASRS retirees, those changes may have gone un-noticed because they were not perceived to affect retirees directly. But each change was made to ensure that our retirement checks would continue to be delivered, even during difficult economic times.

**In 2010, the 80-point rule was abandoned**, as legislation created a new tier of ASRS employees hired as of July 1, 2011. They would earn reduced benefits and must work longer to qualify for normal (unreduced) benefits. Also, the period used to calculate final average salary was lengthened from 3 to 5 years.

**In 2013, the Permanent Benefit Increase (PBI) was eliminated** for those hired as of Sept. 13, 2013. For the rest of us, the PBI remains a poorly designed hedge against inflation, increasing benefits only when investment returns exceed the system's assumed rate, averaged over 10 years. While ASRS made the above major reforms, other smaller changes and adjustments have been made over the years in an effort to slow a rising employee/employer contribution rate, now considerably higher than ASRS members paid prior to 2007.

**Other Arizona pension systems were not immune.** In 2013, the Elected Officials Retirement Plan (EORP) was closed and replaced with a 401k style Defined Contribution

(DC) plan. Legislation passed in 2016, affecting the Arizona Public Safety Personnel Retirement System (PSPRS), established new plan tiers which require new hires to choose between a DC-only plan and a reduced DB plan, combined with a DC plan component. The PSPRS reforms also included legislation that required voter approval of two separate constitutional amendments. Prop. 124 (2016) and Prop. 125 (2018), replaced a PBI with a capped COLA formula.

If done right, public pension reforms are a balancing act, taking into account different stakeholder objectives:

- **For employees, competitive compensation that includes income security in retirement;**
- **For employers, a management tool to maximize investments made in attracting, training and maintaining experienced employees.**
- **For taxpayers, public services performed in the most effective and cost-efficient manner.**

As the 2019 legislative session ends, AEA Retired and the Arizona Retirement Security Coalition (ARSC), of which we are a member, can only spread the alert and wait to see what kind of reform the legislature has in mind for the 2020 session and the 2020 ballot. To defend our profession, we must remain united in defending our ASRS system.

If you need help with making Medicare decisions, or other concerns, contact the Area Agency on Aging, a free-of-charge program offered for Senior Citizens (602) 280-1059 or [aaaphx.org](http://aaaphx.org).

### MEDICARE can be complicated

The Area Agency on Aging's Benefits Assistance Program can help make sense of MEDICARE

If you or a loved one is a Medicare beneficiary, it is important to know:

- What are the Medicare Options?
- At what age can I request Medicare coverage?
- What are the Enrollment Periods?
- Do I need Medicare Part A, B and C?
- What is Medicare Part D?
- What is Medicare Supplement or Medigap?

Area Agency on Aging's Benefits Assistance Counselors can help you understand your Medicare options including programs that may assist with paying for Medicare monthly premiums and Medicare prescription drug cost, for those who qualify.

Call to speak to an Area Agency on Aging Benefits Assistance Counselor  
**602-280-1059**  
 Or  
 24-Hour Senior HELP LINE at 602-264-4357  
[aaaphx.org](http://aaaphx.org)

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# PRESIDENT'S MESSAGE

BY JULIE HORWIN



## Summer break—but not for everyone!

Ah, summer. The pace slows down in Arizona, as our friends and family from other states leave after a mild winter spent on the desert. We love the hustle, bustle and economic impact they bring with them

all fall and winter, but we also enjoy the less-crowded highways and streets during the spring and summer. And even we, who are retired, kick back before shifting into high-gear of substitute teaching, volunteering in classrooms, and pouring our passion for public schools into the politics of next fall. There are just two questions to consider:

1. What should I throw on the grill for dinner
2. Which summer read should I pick up next?

**Summertime and the livin' is easy...right? Well, not quite.**

Many active AEA members including ESP members spend at least part of the summer updating skills through workshops and conferences. This is how we ensure that students, whether in kindergarten or college, **are surrounded by caring, qualified, and committed professionals.**

And there are some school employees who are generally busier than ever after the school year ends. What's *their* summer reading consist of? Lengthy "to do" lists detailing everything that needs to happen to prepare for the next academic year. **They are buildings and grounds maintenance staff;** custodians and housekeepers; mechanics; laborers; helpers; warehouse personnel; and crew leaders.

This summer, they'll be working 10-hour (or longer) days to polish up, fix up, and spruce up buildings and campuses. I know that more than once, when I was teaching, I called on the custodian at my school. Jim would step in as planned and ask if I had a student whom I trusted to be his assistant for an important job, and I'd call on that child who needed a little attention. **Jim knew just how to talk to them like a big brother and make them feel needed and competent.**

This falls outside the job description, but they do it to **connect with kids and help pave the way for students' success.**

I spent much of April planning the AEA-Retired Annual Meeting, planning the NEA-Retired Annual Meeting in Houston with those with whom I serve on the NEA-Retired Executive Council, and raising funds for the NEA Fund For Public Education. ***A big school hug for all of you who have so generously donated.***

The many leaders who serve on the AEA-Retired Executive Council or as a Chapter Chair, or a committee member, will spend part of July and August readying for the Strategic Planning Session and AEA-Retired Committee Days on September 10 and 11.

There are many moving parts to being the premier organization for retired educators, such as: planning the best meetings with informative, entertaining speakers and topics; recruiting new committee members, grant writing to support our programs; planning our political strategies, lobby days, and advocacy training; establishing membership campaigns throughout Arizona; planning and facilitating M.O.R.E. mixers with our NEA-Retired colleagues who never worked here, but now live and vote in Arizona; recruiting and training a new "batch" of intergenerational mentors and going into the colleges to recruit their proteges; organizing to support the Red4Ed movement; scheduling visits to our liaison school districts to give information on their pension system; updating our membership contact lists, and so much more.

We would love to have your ideas and your voice at any and all of the above planning sessions, and please come to our activities throughout the year.

We promise to keep you informed about all of our plans, our events and activities.

If you would like to attend one or both of the Strategic Planning and Committee Days, please go to this link to register. Your lunch will be included both days. We really do want to hear your ideas and get direction from you.

[HTTPS://WWW.SURVEYMONKEY.COM/R/2019COMMITTEEDAYS](https://www.surveymonkey.com/r/2019COMMITTEEDAYS)

Please have a safe and enjoyable summer break – if you have a moment, please send me your favorite book list, so that I can share your great reading experience. Many of you travel away from Arizona during the summer so whether it is up near Flagstaff, or to the Netherlands please be safe, and come back home to your family at AEA-Retired.

Julie Horwin, President, AEA-Retired  
602-320-3093 Please call any time.  
[Julie.horwin@gmail.com](mailto:Julie.horwin@gmail.com)

Congratulations to Julie Horwin, Luci Messing, and Nancy Putman who were elected to represent AEA-Retired members at the NEA Retired Annual Meeting and NEA Representative Assembly this summer in Houston, Texas. Retired members will be well represented.



# LEGISLATIVE UPDATE *By Luci Messing*



It was a busy year once again for the Political Action Committee. Here is a summary of this year's activities.

- **September** - Political Action Committee set goals and plans for the upcoming election.
- **October** - Retirees played a significant role in working for pro-public education candidates, advocates for public pensions, and opponents of tax giveaways
- **November** - We were successful in several key races; Katie Hobbs -Secretary of State, Katherine Hoffman – Superintendent of Public Instruction, Kyrsten Sinema – US Senator, and Sandra Kennedy – Corporation Commission. **Job well done!**
- **December** - AEA-Retired conducted two advocacy/lobbying trainings.
- **January** - First lobby day was held on January 23<sup>rd</sup>. Approximately 50 members attended. There was a legislative briefing with AEA lobbyist, Stephanie Parra and meetings with legislators. A number of representatives spoke at lunch and members observed from the gallery. We began monitoring legislation at the Capitol.
- **February** - Second lobby day on February 13<sup>th</sup>. Approximately 35 members participated. Routine repeated as in January.
- **March** - A number of members attended the Arizona Retirement Security Coalition day at the Capitol on March 13<sup>th</sup>. The Coalition is a strong partnership in protecting our pensions. We also participated in AEA Days at the Capitol on March 12<sup>th</sup> and March 19<sup>th</sup>.
- **April** - There have been a few good bills passed such as the repeal of the four hour teaching block for ELL students, repeal of the prohibition to teach about alternative lifestyles, and passage of a no texting while driving bill. We need to celebrate the wins.
- **May** - The legislative session should be coming to a close with the focus now on the budget.
- **Legislative Highlights**
  - Repeal of the ELL 4 hour block
  - Repeal of the ban on teaching about an alternative life style
  - Ban on texting while driving
  - Prevented any voucher bills
- **Legislative Lowlights**
  - REDforED retaliatory bills introduced
  - Attacks on the initiative process
  - Attempts at voter suppression
  - No legislation dealing with charter schools accountability

As of this writing, there has been no decision regarding the budget. The Governor has promised the 5% increase for teacher salaries but little else for public education. REDforED demands include raises for support staff. Republicans are still upset with the Governor's veto of tax conformity so there's a lack of cooperation between the legislature and the governor.

There also is disagreement on how to spend the extra dollars (\$900 million). The Governor wants to put most of the money in the rainy day fund but public education is still owed over \$700 million.

Our schools desperately need one time capital funding for building maintenance. The republican majority wants to pay down the debt. We must demand that the \$57 million in federal funding for KidsCare be included in this year's budget. And as typical with this majority, Democrats are being left out of the process.

When you contact your representatives and the Governor, be sure to include these priorities on how to spend our tax dollars. Ask that one time money be used for capital maintenance, funding for increased salaries for ALL school employees, use the federal dollars for KidsCare and **no more tax giveaways!**

One last thing, there is a strong possibility that a new Invest In Ed initiative will be proposed in the near future. We will need to work towards a sustainable source of funding for public education. AEA-Retired members will continue to advocate for public education, work with the Arizona Retirement Security Coalition, stay informed and continue to have those conversations with family, friends, and neighbors about public education and protecting our pensions for ourselves and all future retirees.

**Enjoy your summer!**



Putting some "fun" into fundraising for the AEA Fund for political action, Luci Messing, the "Masked Crusader", assisted by Anna Cicero, issues a challenge to delegates to raise \$38,000 to help elect friends of education and seniors. Delegates contributed over \$52,000 during their two-day Delegate Assembly.

(Continued from page 1)

## Delegates elect Secretary and seven Board Members

Retired delegates to the Annual Meeting elected **Janice Dwosh**, who ran unopposed, for Secretary. Additionally, delegates elected seven At-Large members to the Executive Board. **Howard Johnson, Nancy Putman, Marshall Militano, Ken Freed, Connie Wittig, and Julie Cozad** were all elected to three-year terms, and **Danny Barlow** was elected to a two-year term. Their terms begin June 1st when they will join the other Board members and officers.

**AEA President Joe Thomas** brought us greetings and discussed the ongoing fight to secure increased funding for quality public education for all students. He thanked the AEA-Retired members for all that they have done to help in the campaign for strong public schools and reminded us that it's not over, as it will continue until we prevail.

**The 125 members and guests** who attended raised \$4539 for the NEA Fund political action committee to support pro-public education candidates at the national level. The next day at the AEA Delegate Assembly, the 87 retired delegates actively participated in all the business of the Delegate Assembly, and contributed over \$4600 to the AEA Fund to help elect pro-public education candidates at the state level.

**The quilt raffle** raised \$2375 for the NEA Retired Jack Kinman Scholarship Fund and the AEA-Retired budget. The quilt was created and donated by **Paula Mueller** and was won by Ivy Sweeney of Marana. Thanks to **Marilyn Freed** for another fantastic fundraiser.

Many thanks to **Suzan Austin, Annual Meeting Chair**, her **Co-Chair Anna Cicero**, and helpers **Norma Jimenez** and **AnnJi Craig –Wooton**, for all their hard work in coordinating the successful 31st Annual Meeting and hospitality suite.





# Intergenerational Mentoring completes 2nd year

AEA-Retired Intergenerational Mentoring program completed our second year of mentoring Teacher Candidates from the ASU-MLFTC, Tempe and Higley Elementary cohorts with a celebration on April 26<sup>th</sup>.

The mentors hosted 2019 Teacher Candidate graduates and some mentees from last year who requested that their mentors follow them through their first year of teaching. The sharing of time, knowledge and love of learning with these brand new teachers are the beginnings of relationships that will last evermore. What a gift!!!



We continue to recognize the efforts of Julie Horwin, President of AEA-Retired, for her strong commitment and advocacy in support of increasing teacher retention and for fostering and promoting future educators' success in our public schools; as well as for the support she has given our Mentoring Program.

AEA-Retired's Mentoring goal is to see our proteges begin their teaching careers prepared to face and solve challenges they may encounter with classroom management and with imparting instruction. We want our educators to be successful and stay current with best teaching practices.

To that end and to support the goal of AEA-Retired Intergenerational Mentoring, as it pertains to best teaching practices of the 21<sup>st</sup> Century, NBCT Rae Ann Rumery conducted training on the use of the Professional Learning Plan Toolkit to two cadres of mentors and protégés. "This Tool Kit encourages teachers' reflective planning and inquiry that helps them determine what they need to improve in their teaching and student learning. By focusing our mentoring work on the InTASC Model Core Teaching Standards we are supporting reflective practices to explore innovative strategies and approaches to assist these new educators in becoming the teacher leaders our learning communities need," commented Rae Ann. She adds, "I love how mentoring keeps me connected to the classrooms of today and allows me to inspire teachers of tomorrow."

Sherry Phillips' inspiration to mentor wasn't curtailed when her protégé accepted a position in Mayer this past year. Rather, it allowed her time to reflect while driving and pen a poem which was shared with all involved in the program.

We know how much reflective teachers are needed in our public schools to help our students, tomorrow's leaders, thrive and be successful; and that's one of the reasons why we chose to become mentors. Our beginning teachers were most appreciative of the guidance provided by mentors to plan for their future careers regarding classroom management.

Co-chairs Maria Vinaras and RaeAnn Rumery invite you to join our efforts toward inspiring the best teachers in our classrooms! Please access our website to fill out the application.



<https://www.surveymonkey.com/results/SM-Y8FQ53BY8/>



**Photos: top left; Teacher Candidate Andrea Sterry, mentor Sherry Phillips, & 1st year teacher Kelli Varich; top right, TC Amanda Wells & mentor Joanne Risley; left, TC Julio Yac & mentor RaeAnn Rumery; below, Co-chair Maria Vinaras with mentees Emily**





## Retired members help VIP approve Human Development Agenda

On Thursday, May 2, 2019, members of AEA-Retired joined other institutions and education associations to discuss the direction Valley Interfaith Project will take for the next year. Those members of AEA-Retired in attendance were **Katri Hakes, Connie Wittig, Larry Wittig, and recently retired educator, Eric Kurland**, a 2020 candidate for the AZ Legislature from LD 23. The following Human Development Agenda was ratified by VIP member Institutions in attendance. They are listed in no specific order of importance:

- a) High-Skill, High-Wage Workforce Training Strategy via the Arizona Career Pathways Initiative
- b) Comprehensive Health Initiative in defense of AHCCCS and KidsCare. VIP was previously successful with the Life-Span Respite Care Act
- c) Safe Neighborhoods Initiative
- d) Quality Education for Children and Youth Initiative-Public School Finance
- e) Criminal Justice, Sentence, and Re-entry Reform
- f) Comprehensive Immigration Reform and assistance for families seeking Asylum
- g) Debt Burden for Families and Small Businesses via predatory loan fees
- h) Water as a vital resource in Arizona. The current Drought Contingency Plan is only a beginning



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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, business meeting, lunch or dinner, and time for socializing with friends and colleagues. Anyone interested in forming a new chapter should contact Chapter Coordinators **Susan Sommer**, [ssommer114@aol.com](mailto:ssommer114@aol.com) or **Suzan Austin** at (480) 947-2089 [suzanaustin@cox.net](mailto:suzanaustin@cox.net).

**Glendale/West Valley Chapter-** The meetings are held at Biscuits Café, 19420 N. 59<sup>th</sup> Ave., Glendale. Our next meeting will be October 3, 2019 at 10:00 AM. Our last meeting was well attended as Marshall Militano brought us up to date on the latest information about the Dirty Money proposition. All members are welcome to join us for news pertaining to retirees and senior issues. Call, text or email **Susie Sommer** at 623-628-1935 or [ssommer114@aol.com](mailto:ssommer114@aol.com)

**Mesa / East Valley Chapter:** On May 8, guest speaker was Mesa School Board member Marcie Hutchinson. Who explained the dire situation in Mesa Public Schools if the Override is not passed in November. Our chapter wrote over 8000 postcards for Marcie prior to the last election, and she is hoping we again spread the word about voting and passing the override. The bond passed, so Mesa has sufficient funds for buildings and buses. However, the override is necessary to attract and retain quality certified and classified personnel. Contact **Janie Hydrick** at [Hydrick@aol.com](mailto:Hydrick@aol.com) or (480) 963-1848 for more information.

**Greater Tucson Area Chapter:** Meetings are held the third Tues. of Sept.—May, at 10:00 AM, and alternating sites between the TEA office and the Southern Region office. Our last meeting was on Tuesday March 19<sup>th</sup>, at the AEA Southern Region Office at 6873 N. Oracle Road. For more information, contact **Marion Pickens**, Chair 520-296-5908 or [marionpeterpickens@gmail.com](mailto:marionpeterpickens@gmail.com)

**Phoenix Chapter:** Meets at the Beatitudes in Phoenix, 1610 W. Glendale Ave. at 10:30 AM. The last meeting was held on March 19th. Guest speaker was a spokesperson from Outlaw Dirty Money who gave us an update on how this campaign plans to go forward. Since the meeting was before signature gathering takes place, we may have a representative come back and speak to our group in May. Our last meeting of the school year will be on May 21st. We will also discuss any updates on AEA positions related to education proposed at Delegate Assembly on May 10th and 11th. Our next meeting will be September 17th, at 10:30 am. Contact Chapter Chair **Michele Smith** at 602-463-1624 or [mms7997@msn.com](mailto:mms7997@msn.com).

**Scottsdale/Paradise Valley Chapter:** We meet at Denny's Restaurant on Mayo Blvd. and Scottsdale Rd. at 11:00 a.m. on the 3rd Monday, bi-monthly. At our last meeting, guest speaker Craig Harris, investigative reporter for the Arizona Republic, talked about his award winning Arizona Charter Schools series. Our next meeting will be Sept. 16. We welcome any AEA –Retired member, or potential member, to our group. Contact **Nancy Riley**, 480-596-1144, [rileyfam@cox.net](mailto:rileyfam@cox.net), or **Ann Myers** 480-510-8098, [azann@mac.com](mailto:azann@mac.com)

**Southeast Arizona Chapter:** The Southeast Arizona AEA-Retired chapter is located in Cochise County and is comprised of education retirees from districts in Sierra Vista, Tombstone/Huachuca City, Naco, Palominas, Elgin and Fort Huachuca, and retirees from parts of Arizona and other states who have opted to move to Cochise. We meet over dinner in various restaurants in the Sierra Vista/Hereford area approximately every other month. The next meeting will be in August, place and date TBA. To join us, contact Sally Rosén (520)249-0233 or [azcatsally@aol.com](mailto:azcatsally@aol.com)

**Flagstaff Chapter:** If you live in the Flagstaff area, you can't afford to miss out on our AEA-Retired chapter meetings, held on the first Tuesday of each month, 10 AM to noon, in the basement room of Flagstaff Federated Church. We work to stay informed and support Arizona's retirees, educators and students through service projects, political action, and constant monitoring of retirement issues at the state and national levels. We hope you will join us and lend your expertise to our efforts to support our profession and the people we serve. For more information and to RSVP, contact **Tricia Roach** at [trteach6@mac.com](mailto:trteach6@mac.com) or call 928-525-1997.

**Kyrene Chapter:** On April 17, guest speakers were two school board members (Kevin Walsh from Kyrene District and Andres Barraza from Tempe Union High School District) for a one-on-one Q&A. Educators and board members were delighted to be able to ask questions, provide comment and feedback, and suggest changes for the 2019-2020 school year. We meet at Native Grill and Wings, 5030 Ray Rd. #5 from 4:30 to 6:30. Active, as well as retired members are invited to attend. Contact Ellen Shamah at [eshamah@cox.net](mailto:eshamah@cox.net)

**Yavapai Chapter:** At the April 11<sup>th</sup> meeting, the Chair disseminated and discussed notes from the AEA-Retired Exec Board meeting, including political items of interest to the members. **Chapter members toured the Yavapai CTEC facilities in Prescott on Friday, April 26, to become more familiar** with the 28 programs sponsored by the county. Members also visited the YEI (Yavapai Exceptional Industries) facilities in May to view the occupational activities being provided for the mentally and/or physically handicapped adults. The chapter's last meeting of the school year will be on May 23<sup>rd</sup> at Augie's restaurant. As usual, the meeting will begin at 11:15. Future meetings will be finalized at the end of August, although the chapter meetings are usually held the Thursday following the AEA-Retired Exec Board meetings. Contact Chairperson **Rob Johan** at [johanica31@gmail.com](mailto:johanica31@gmail.com) or 630-430-8902 for more information.