



INSIDE THIS ISSUE:

<i>ASRS Report</i>	2
<i>ASRS Health Committee</i>	2
<i>President's Message</i>	3
<i>Legislative Update</i>	4
<i>Photo Essay</i>	5
<i>NEA Retired Meeting and NEARA</i>	6
<i>Barbara Matteson</i>	7
<i>Impact Update</i>	7
<i>Chapter News</i>	8

Members attend first AEA Retired Committee Day to plan for upcoming year

In the very first ever Committee Day for AEA Retired, three committees met to begin planning activities for the upcoming membership year. On September 14, thirty-five AEA Retired members convened at AEA Headquarters in Phoenix to review the needs of members and plan for meeting those needs.

After briefly reviewing the 2009 member surveys and Annual Meeting suggestions, and discussing the results as they pertain to today's environment, attendees gathered into three separate committees: 1) Membership Outreach 2) Chapter

Development and 3) Public Relations. Each committee spent the rest of the day creating activities and outcomes to accomplish their goals. As a result of the hard work and planning of the members of these committees, AEA Retired will improve our ability to reach out to potential members, better meet the needs of our chapter members, and improve communications both within our membership and to external groups.

Future meetings for the committees will be in conjunction with AEA Retired Board meetings.

Editor's note: There are many photos in this issue for you to enjoy. To get a clearer view, go online to www.arizonaaea.org/assets/document/aeaconduit1011.pdf and set the size to 200% or more.



AEA Retired Executive Board & Committee Chairs/Members: Back row: Gary Mehok, Susie Sommer, Steve Linder, Susan Sain, Juan Zuniga, Shirley Boswell, Ted Coleman, Judy Moy, Richard Spitzer, Cindy Michels, Barbara Joseph, Frank Bing, John Campbell. Front row: Ken Freed, Suzan Austin, Brenda Pierce, Aurora Aber, Danny Barlow, Sally Rosen, Linda Somo, Kathy Ramage-White, Jean Stephenson, Julie Horwin, Kathy Campbell, Steve Ramos.



AEA-Retired Calendar

- November 8– AEA-Retired Board of Directors, AEA HQ
- December 13– AEA-Retired Board of Directors, AEA HQ
- January 10– AEA-Retired Board of Directors, AEA HQ
- February 4– Committee Day
- February 14– AEA-Retired Board of Directors, AEA HQ
- February 29 – Education Day at the Capitol

AEA Retired Members hard at work on Committee Day 2011



ARIZONA STATE RETIREMENT SYSTEM UPDATE

BY STEVE RAMOS, ASRS CHAIR

ASRS Continues Outstanding Performance While Adjusting to Changes Mandated by Legislature and Courts



Your Arizona State Retirement System posted a record high return on investments, finishing the 2011 fiscal year just shy of 25%. AEA Retired congratulates and thanks our ASRS Trustees and staff for the outstanding job they do managing one of the best defined benefit public retirement systems in the country. Despite this outstanding performance, the Arizona legislature has established a committee to study and make recommendations regarding “the feasibility and cost of transferring existing members of the DB Plans to a new DC (defined contribution) Plan as well as implementing a DC Plan for new hires.” ASRS retirees depend on active members and new hire contributions to maintain the solvency of the fund. Don’t pass up a chance to remind your elected officials how important your DB plan is to you and your families!

We reported in May that in order to balance the budget the Arizona legislature increased the ASRS employee contribution from 50 to 53 percent and decreased the employer contribution amount from 50 to 47 percent. AEA has joined other employee groups to file a lawsuit challenging the change in contribution amounts, claiming it

violates the state constitution and contract law.

Last year, as a result of a Freedom of Information request, ASRS had to release some member data to the press. ASRS Director Paul Matson invited AEA Retired and other employee groups to join a discussion concerning the privacy of member data. ASRS is exploring options for the future, but for now will continue to follow Arizona and Federal public record statutes, keeping member data as private as legally possible. Matson and AEA Retired agreed that legislative changes could be necessary in the future.

At times ASRS is challenged in court and a judge’s ruling contradicts the Board’s legal interpretation of a rule or procedure. Recently ASRS has received appeals from spouses of deceased members who were denied survivor benefits as a result of a member’s beneficiary selection of another person. A judge has ruled that, “a non-beneficiary retains their community property rights to a benefit resulting from contributions made during the marriage.” Community property statutes call for divorcing spouses to split items of value 50/50. As a result of the ruling, ASRS has clarified information about beneficiaries on its forms, publications and website to “allow a spouse to timely assert a community property right.”

Finally, the ASRS Board began discussions in September about the methodology used for determining the Permanent Benefit Increase and its implications for the fund and its members. The Director suggested it might be prudent to seek modifications to existing legislation. AEA Retired representatives, as always, will be involved and will keep our members informed as these discussions progress.



Richard Spitzer

ASRS Health Benefits Committee Report by Richard Spitzer

The current ASRS agreement with United HealthCare for medical insurance allows for yearly renewals for five years if both parties agree. Negotiations with UHC were concluded in June for another year of coverage in 2012. Non-Medicare insurance premiums will be increasing, but Medicare Complete (Advantage) and Supplement premiums will stay the same. ASRS will solicit bids from interested insurance companies for 2013 coverage. A Health Benefits subcommittee will assist and give input into that process. The ASRS Health Benefits Committee consists of retired members of ASRS representing various associations such as AEA Retired.

Open enrollment is planned for October 24 through November 18. Insurance packets should be arriving about two weeks before open enrollment begins. Plan on attending an Open Enrollment meeting for information on the various plans and additional benefits offered through ASRS. A new dental plan option will become available for next year. This plan will not have deductibles and will not have copayments for preventative services. More than 100 procedures have been added and most procedures will have lower copayments than the Heritage Secure plan (prepaid). (continued on page 4)

PRESIDENT'S MESSAGE

BY LINDA SOMO

The clock is ticking. In less than 14 months American voters will be selecting a President, an entire House of Representatives, and 1/3 of the Senate. Arizona voters will be voting for a total legislature. It is a drastic understatement to say that a lot is at stake. I watched with interest the Republican candidates' debates and President Obama's speech before Congress on his Economic Development & Deficit Reduction Plan. The differences between the Democratic and Republican approach to solving the nation's economic woes could not be more pronounced.



The leading Republican candidates appear to repudiate Social Security, Medicare and Medicaid, programs that serve seniors and our most vulnerable citizens. Their plan for creating jobs consists of lowering taxes even more for our wealthiest individuals and corporations and eliminating any regulations. However, the wealthy and large corporations are already enjoying the lowest tax rates in the history of our nation, and new regulations were instituted to prevent some of the financial abuses that caused the worst recession since the Great Depression. Corporate profits are at their highest levels and individual wealth has increased exponentially, but so far, there has not been a rush to create new jobs, at least not here in Amer-

ica. American corporations have created millions of jobs overseas. Even though there is no empirical data to prove that lowering taxes and eliminating regulations leads to job growth, the Republicans repeat the mantra incessantly and firmly believe that will solve the problem and propel the economy. Their plan for dealing with the budget deficit consists strictly of cutting programs, with no additional revenues.

President Obama's plan calls

for payroll tax cuts for working men & women, tax incentives to businesses for hiring long-term unemployed and veterans returning from the wars, investing in jobs that will fix dilapidated bridges, highways, schools and other infrastructure (a proven technique for helping the economy), and protecting Social Security, Medicare and Medicaid. Some deficit reduction proposals include increasing taxes for America's wealthiest individuals and large corporations, reducing the number of troops stationed in Iraq and Afghanistan, and eliminating Medicare fraud that costs billions of dollars yearly.

A Good Reason to Join AEA-Retired



Judy Moy

Although Judy is currently representing AEA Retired on the AEA Board, she does a lot more for our association than just report on meetings attended. She is the first one to volunteer when we need something done. And she always has a membership form available for the teachers and retirees she encounters when she visits sites. She has acted as a mentor and role model in her district, and she is one for retired members as well.

The choice is clear. Please join me in voting for a president and congress who will put the interests of seniors, public education, and working men & women above the interests of the wealthy and corporations. Your vote will determine the future, and.....the clock is ticking.



Legislative Update by Linda Somo

As you undoubtedly know, the 2010 legislative session was not kind to public education or public education employees, but for the most part spared our public employee pension system, ASRS, from any drastic changes. However, the most egregious change that was made mandated that contribution rates, which had always been shared equally by employees and employers in a 50/50 split, be changed to a 53% employee contribution while employers paid only 47%. That change took effect on July 1 of 2011, making the employee pay 11.39% of salary while employers pay 10.1%. AEA is suing on this issue arguing that pension rights are contractual and the state cannot unilaterally modify the terms of agreement. AEA also believes that the application of statute to people who are already members of the ASRS system impair their pension rights and violate the Arizona Constitution (Article 29).

A union-busting bill directed specifically at AEA makes it virtually impossible for AEA dues to be payroll deducted for those still working in school districts after October 1st of this year. Many of you have been involved in helping to successfully “flip” active AEA members to other forms of paying their dues, such as by electronic funds transfer or credit card deductions. AEA is also suing the state about this bill which unfairly targeted only education employees, excluding other public employees such as police and firefighters, and is a blatant attempt to silence the voices of public school employees.

Of most concern to retirees is the Defined Contribution and Retirement Study Committee which met for the first time on September 27. At press time we have no updates to share with you, but watch for future issues of *The Conduit* and updates from our electronic newsletter. Possible legislation for 2012 includes:

- allowing new employees to opt-out of the ASRS system and create a 401K-style defined contribution plan instead. **AEA and AEA Retired will oppose any such plan and may need your help to defeat such a proposal.**
- Continuing the shift to employees to pay a larger portion of their retirement contribution rate. **AEA Retired will work closely with AEA to oppose such plans.**
- Proposing a flat tax income tax that would raise

the tax rates for 8 out of 9 Arizonans and cost retirees more in taxes. **AEA Retired will work closely with AEA to oppose such plans.**

Renewed efforts at the national level to privatize or cut Social Security and Medicare. **NEA members will be strong advocates for stopping cuts to our two strongest anti-poverty programs and protecting the rights of seniors.** We will continue to keep AEA-Retired members informed about issues that affect them and education. Become an active lobbyist for retiree and education issues by joining www.educationvotes.nea.org. Together we can make a difference.

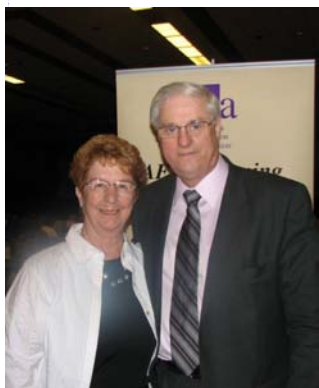
(continued from page 2)

Health Benefits Committee Report

It will include an implant benefit and orthodontic treatments. This plan will be a better deal for members who use many dental services. Members who do not use very many services will find the current plans to be a better deal and they will still be offered. The new plan will be offered through a network of Plan dentists.



NEA-Retired Annual Meeting and NEA Representative Assembly Photo Essay



NEA Retired Annual Meeting & NEA Representative Assembly 2011 In our own words...

AEA Retired was represented by 12 members who attended the NEA Retired Annual Meeting held June 27-29 in Chicago, IL. Those attending were: Linda Somo, Julie Horwin, John Campbell, Kathy Campbell, Gary Mehok, Ken Freed, Marilyn Freed, Judy Moy, Jean Stephenson, Suzan Austin, Ted Coleman and Shirley Boswell. Additionally, Linda, Julie, Kathy, John, and Gary served as delegates to the NEA Representative Assembly held July 3-6. Below you will find some of the highlights of the meetings in their own words.

Jean Stephenson

The *first* of five general sessions welcomed everyone, reported on 2010 New Business Items and included candidate nominations and an inspiring speech from NEA President Dennis Van Roekel. The *second* general session included the President's Report from Barbara Matteson and candidate speeches. During the *third* general session the members heard from NEA Vice President, Lily Eskelson, always informative as well as entertaining. Other business included the NEA Resolutions Update and the Communications Awards Presentations. The *fourth* general session focused on New Business Action and featured a message from Barbara Easterling, President of The Alliance for Retired Americans. (AEA Retired is an affiliate so we are all members of the Alliance.) Finally, Timothy Hargrove, Manager of NEA Financial and Membership Services, spoke during the *fifth* general session.

On the second day there were six workshop sessions and the Outreach to Teach Project scheduled simultaneously. I chose to help make many improvements at Dawes Elementary School and, along with NEA Student members, we NEA Retired folks transformed the teachers' lounge into a thing of beauty.

Kathy Campbell

Despite having to stand in line for over two hours to get through tight security to enter the assembly hall, my most memorable, of many memorable moments this RA, was when Vice President Joe Biden addressed us. (His speech is available on the NEA website and well worth your listening time.)

Gary Mehok

A momentous decision was made at RA when the delegates voted overwhelmingly to support President Obama for a second term. Usually the association's presidential recommendation process takes place the summer before the general election. However, by waiting until next year our endorsement would not be known until very close to the 2012 election. We now have 16 months to provide early and strong support locally and nationally to help ensure his re-election. A wise decision!

John Campbell

I was deeply moved by NEA President Van Roekel's key note address, one of his best speeches ever. He included a NEA history lesson which pointed out that we experience our finest times in the face adversity. After speaking about all of the attacks public education and public employees have suffered this past year, he closed by saying we are standing strong for students, public schools and for the American Dream. How true!

Shirley Boswell

I was recommended to serve on the NEA Retired Elections Committee by Barbara Matteson, and it was a wonderful refresher course in government, as well as being a very enlightening and rewarding experience. The process clearly demonstrated that your organization, NEA Retired, practices democracy for its members.

Julie Horwin

I was delighted when AEA President Andrew Morrill asked me to be in charge of NEA President Dennis Van Roekel's re-election campaign booth at the NEA-RA. When it was time to set it up at the convention center, AEA Director Judy Moy and her sister spent all day helping me in this massive task. For several days I was joined at the booth by wonderful volunteers from all over the United States who wished to be a part of Dennis's last campaign (he will be "termed out" so this will be his last 3-year term as NEA President). He is such a beloved leader! It was a great experience.

Suzan Austin

It was another great NEA Annual Meeting! I am always so proud that Arizona is represented on the NEA Board of Directors by our own Linda Somo and John Campbell. The workshops I attended were all excellent but none better than the very popular "Facebook 201" presented by Julie Horwin. She showed us how Facebook can help affiliates run a successful campaign to deploy members to action. She even made her "Facebook 101" and "Facebook 201" available on CD for attendees! Please join AEA Retired on Facebook at <http://www.Facebook.com/AEARetired>.



Arizona's own Barbara Matteson feted at end of term as NEA-Retired President; steered NEA Retired since 2005; honored as a "unique force"

Barbara Matteson's 6 year presidency of NEA-Retired ended with a bang as she was celebrated by NEA Retired leaders, AEA Retired Leaders, NEA President Dennis Van Roekel, NEA Vice President Lily Eskelson, NEA Secretary Treasurer Becky Pringle and her family and many friends. Barbara's leadership has gone beyond the halls of NEA – through her mentorship of many leaders from many states and her contributions to many other organizations and councils.

Barbara said she's proud of what has been accomplished at NEA Retired during her tenure. "Our NEA Retired members and leaders are bright, creative and motivate us to continue to strive to offer a challenging and flexible learning environment for all NEA Retired members as we go forward into the 21st century," she said.

NEA President Dennis Van Roekel thanked Barbara for her commitment to education and the NEA, saying he would characterize the long-time educator "as a woman who has been a valuable mentor to me and so many others by modeling what it is to be a strong association member and activist. True leaders lead by example and you have done that. Among your greatest contributions is your ability to nurture others to follow in your footsteps."

"Each one of us has been enriched because of her good work," Van Roekel said.

"She's a unique force," NEA Vice President Lily Eskelson stated, "We all need her continuing counsel."

"NEA Retired had a need to sharpen its vision and strengthen its identity, and Barbara proved to be the perfect leader to step up to those challenges," John Curran, new NEA Retired President said. "NEA-Retired is now in a better place than it ever has been."

AEA Retired thanks Barbara for all she has done for us at the state and national level and wishes her time to enjoy some hiking and travelling!

Tucson IMPACT Update

As the University of Arizona students and professors begin another year, so do the IMPACT (Intergenerational Mentoring Program Attracting and Connecting Teachers) mentors and protégés. This program matches AEA retirees with U of A College of Education juniors and seniors to help provide insightful tips to these students as they get ready to enter our profession.

In Tucson the coordinators, Claudia Jensen and Marilyn Freed, have met with the UA Director of Elementary Education, Dr. Donna Jurich, to plan for the coming year. Claudia and Marilyn will be attending classes at the U of A to recruit eligible students to add to the 20+ teams that are already functioning. They also have contacted many Tucson retirees and asked if they would like to assist a new colleague.



Marilyn and Ken Freed with their mentee

If you would like to join this growing group, get in touch with Claudia (ClaudiaJensen@aol.com) or Marilyn (MarilynFreed@aol.com). Join in the fun, make an IMPACT!!



The Conduit



A Publication of AEA Retired,
An affiliate of NEA Retired

345 E. Palm Lane
Phoenix, AZ 85004
602-574-1473
aea.retired@arizonaaea.org

Linda Somo	President
Frank Bing	Vice President
Julie Horwin	Secretary
Jean Stephenson	Treasurer
Kathy Campbell	Past President

The Conduit Guest Editors
Suzan Austin, Julie Horwin, Linda Somo

AEA Retired, YOUR STATEWIDE LOCAL
Affiliated with Arizona Education Association
345 East Palm Lane
Phoenix, Arizona 85004

Presorted Std
U.S. POSTAGE
PAID
PHOENIX AZ
PERMIT NO. 1157

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 Chapters Chairperson **Gary Mehok** at LOJO40@cox.net.

Glendale/West Valley Chapter- Meetings for 2011 are October 6 and December 1 at 4 PM at Ironworks Restaurant at Bellaire Golf Course. The group contributes new books to children at Andrea's Closet. For info contact **Susie Sommer** at <http://www.azedretired.com/GLENDALE/index.html>.

Mesa / East Valley Chapter: The first meeting was held on Sept. 14 and Jerry Lewis, Sen. Russell Pearce's challenger, spoke. The guest speaker was Elizabeth Harris who reported on Medicare Fraud. Future meeting dates for 2011-2012 are 11/9, 1/11/12, 3/21/12, and 5/9/12 from 11-AM to 1 PM at the Sunrise Bank Bldg., 63 E. Main St., Mesa. Lunch costs \$6. Contact **Steve Ramos** at steveramos2@cox.net or (480) 924-0771 for info.

Greater Tucson Area Chapter: A well attended meeting was held on Sept. 20 at the Southern Region Office in Tucson. For more information go to <http://www.azedretired.com/TUCSON/index.html>.

Phoenix Chapter: The first meeting this fall was held at Metro Tech in the Culinary Department on Sept. 27. For info contact **Barb Joseph** at (602) 859-0165 or (602) 765-0788 or btjoseph@cox.net.

White Mountain Chapter: For information about this chapter, contact **Gary Mehok** at LOJO40@cox.net.

Prescott Chapter: A meeting was held on Sept. 12. Future meetings will be held on Fridays. To join this chapter, contact chair **Ted Coleman** at (928) 856-9135 or tdashfork@azwildblue.com.

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

Scottsdale/Paradise Valley Chapter: The first meeting this year was held on Sept. 26. Meetings are at Macayo's on Scottsdale Rd. north of Shea Blvd. for lunch from 11AM-1PM. For info about the next meeting contact **Suzan Austin** at (480) 947-2089 or visit <http://www.azedretired.com/SCOTTSDALE/index.html>.

Southern Region: A meeting was held on Aug. 18 in a great new restaurant in Huachuca City. The next meeting is on Oct. 18. Please contact **Sally Rosen** at (520) 459-0430 or Azcatsally@aol.com for more info.

Northern Arizona: If you are interested in joining this new chapter, contact **Gary Mehok** at LOJO40@cox.net or **Danny Barlow** at dsjbarlow@yahoo.com.