



THE CONDUIT

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Editor's note: There are some photos in this issue for you to enjoy. To get a clearer view, go online to www.azedretired.com/Documents/Conduit/aearconduit0612.pdf and set the size to 200% or more.



AEA-Retired Calendar

June 26-29 NEA-Retired Annual Meeting, Washington DC Marriott

July 2-5 NEA Representative Assembly, Washington, DC Convention Center

September 14-15 AEA-Retired Board of Directors Leadership Retreat, AEA HQ, Phoenix, AZ

September 16 AEA Committee Day, AEA HQ, Phoenix, AZ



AEA-R Annual Meeting a spectacular success; record-breaking attendance and great speakers make it a day to remember; Connie Wittig, recipient of Les Reynolds Award; fundraising for NEA and AEA Funds "unbelievable"

Even the weather cooperated as AEA-Retired held their Annual Meeting on April 27 in Mesa. We were blessed with a beautiful day, informative articulate speakers, gracious award winners, over-the-top fundraising, a fantastic lunch, and yes, a concluding happy hour. Our attendance shattered all previous records as 112 members participated.

At the beginning of the meeting day, VP **Frank Bing** made an appeal for voluntary donations to the NEA Fund for Children and Public Education, the NEA PAC for federal elections. Apparently, members understood the importance of this election year, because by day's end, we had collected over \$3,700, nearly double our effort from last year.

AEA-R Treasurer **Jean Stephenson** presented the financials and the 2012-2013 approved budget.

Our first speaker stressed the urgency of state political action. AEA Chief Lobbyist, **Jennifer**



Jennifer Loreda

Loreda, discussed the legislative session for the past year and urged us to lead the way for our active colleagues. Education suffered again this year under the GOP Super Majority, but AEA-R did have a huge success in overturning the legislature's move to raise the percentage of contributions for employees to 53-47. A lawsuit brought by AEA was successful in changing it back to 50-50.

AEA-Retired President **Linda Somo** inspired the crowd with her speech entitled, "Where Do You Stand? Challenges Ahead." Table discussions followed the speech, and each table had the opportunity to report their ideas to the group.

Elections took place for Vice President and Board Members At-Large. **Frank Bing** was uncontested in his re-election for Vice President, and in the Board elections, the following were elected: **Nancy Putman**, **Steve Linder**, and **Barbara Matteson**. Congrats to all.

This year's Les Reynolds Distinguished Senior Service Award went to longtime member **Connie Wittig**. Connie's proud family attended the ceremony. Les Reynolds Award chair **Kathy Campbell** made the presenta-



Linda Somo & Connie Wittig

tion to her long-time friend. Connie's leadership over the years in AEA-Retired has inspired many to hone their leadership skills. As an active member, Connie was an administrative assistant at her school. Well deserved, Connie.

Next was an inspirational speech from AEA-Retired member **Pam Simon**. Pam was a staff person for **Congresswoman Gabrielle Giffords**, and was there in January, 2011, when the tragic shootings occurred in Tucson. Pam was severely wounded in the attack, and after a lot of recovery and therapy, has made a full recovery. Her descriptions of the event and of Gabby's courage gripped the audience. Thanks, Pam.



Pam Simon and mentor Barbara Matteson

Next up was **Linda Torkelson**, from Communities in Schools, Arizona. This group adopts schools and tries to provide for students' needs through volunteers. Many of our AEA-R chapters have adopted CIS as a community project. The East Valley Chapter presented Torkelson with a \$250 check, and others are also contributing.

A huge highlight of the day was the Keynote Speaker, **Paul Matson**, Executive Director of the Arizona State Retirement System (ASRS). Paul brought us up to date on all the activity at ASRS, and answered all questions that the attendees had. Paul has been our keynote speaker in the past and is always a big hit. Evaluation reviews are consistently high.

In New Business, the AEA-Retired endorsed the candidacy of **Dr. Janie Hydrick** for Arizona State Senate in Legislative District 18. Janie is finishing her six years as NEA Director for Arizona and will join our ranks next year. You can visit her web site at www.HydrickforAZ.com.

The day finished up with a live auction and silent auction, followed by the legendary AEA-Retired Happy Hour. All in all, it was a GREAT DAY!

On April 28, the AEA-Delegate Assembly attracted a record 74 Retired delegates. **Judy Moy**, our AEA-Retired member on the AEA Board, shepherded us through the business beginning at the breakfast caucus meeting, and it was another successful day.



Paul Matson

ASRS Update by Steve Ramos, AEA-Retired ASRS Chair

The way voters view public employee pension plans should concern AEA-Retired members and the ASRS

The results of the recent elections in Wisconsin and California should raise our concerns about our ASRS pension plan. Rather than working with public employee groups to solve pension problems, some cities and states have turned to the media and the voters for support in cutting benefits and overhauling plans. The cities of San Diego and San Jose voted 66% and 70% respectively in support of cutting not just the benefits of future hires but also those of current workers. Voters are seeing city costs rising and services being cut. Since good retirement plans have disappeared in the private sector, voters have been convinced that all public employee plans are overgenerous and undeserved. The cities may face expensive lawsuits, but the strong support for these measures will certainly embolden other politicians across the country.



Steve Ramos

If there is some good news, it is that our legislature did pass a pension reform bill in 2011 that went along way toward bringing other state retirement plans in line with the less generous ASRS plan while still maintaining a Defined Benefit design. However, that bill required a study committee to look into changing all plans to an inferior Defined Contribution plan design. This committee must report to the governor by the end of 2012 so action can be taken in the next legislative session. The

legislature that we elect in the Primary Election in August and the General Election in November will hold the fate of public employee retirement plans.

So far the courts have upheld the constitutional protections that AEA Retired fought for and convinced voters to support in the past. Our concerns will come from those parts of our plan that are still controlled by the legislature. Here is a partial list of the battles we may face.

The governor and legislature could

- Eliminate cost of living increases or the PBI (Permanent Benefit Increase)

- Require new hires to join a Defined Benefit 401k style plan, shifting risk to the employee and releasing the state from any liability for future costs.

- Raise contribution rates so high that it forces current employees to voluntarily give up their constitutional protections and move to the Defined Benefit plans.

- Freeze the amount of pay that can be used to calculate pension benefits.

- Change the multiplier used to calculate pension benefits.

- Appoint and approve ASRS Board members that have significantly different political and economic philosophies than the current board.

Currently the ASRS Board has one vacancy, that being the seat representing educator members. The Board was able to get the legislature to pass, and the governor to sign its legislative package for the year. Again, ASRS sought changes to make sure the plan operates efficiently and to the benefit of the members. The plan continues to be funded at less than 100% because of the slow and uncertain nature of the economic recovery.

I have recently served on an AEA team to interview candidates running for election to the state legislature. These interviews are part of the process leading to AEA recommendations for primary and general elections.

Legislative and Political Update

By Susan Sain, AEA-Retired Legislative Committee

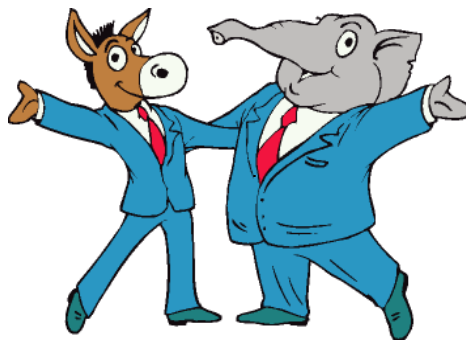
This last Arizona legislative session was a study in contrasts.

Districts can't offer a Mexican-American Studies course, but can now have an elective that teaches the Bible as literature. The governor vetoed an expansion of private school tax credits, but allowed an expansion of the school voucher program. Despite a \$450 million surplus, funding for public education remained the same except for \$40 million to fund third-grade reading intervention programs.

While bills that would allow guns on college campuses or censure teacher speech failed, others were passed that change teacher and administrator evaluation processes and a personal reform bill that removes the protection of the merit system (due process) for nearly 6000 state employees outside of the education system.

Luckily, the employee/employer ASRS contribution rates were rolled back to the 50%/50% levels after a court found the 53%/47% split to be unlawful. That meant state and school

employees had their already meager paychecks restored. Additionally, the discussion of defined benefit vs. defined contribution retirement systems remained under study with no changes at this time.



With the new legislative and congressional maps in place, at least for this election cycle, there are possibilities for change. More districts are competitive. Educators and education-friendly candidates are running for those seats. It is possible to turn the tide against the anti-public school, anti-public employee, and anti-union sentiment that prevails in the legislature. What's more, there are several initiatives and referendums that are heading to the November ballot. They include the AEA and AEA-R endorsed Quality Education and Jobs Initiative that will continue the 1-cent sales tax as a dedicated funding

stream for education; and two referendums that pertain to state land management and state trust land revenues. AEA has a process in place to vet and endorse candidates and other ballot issues. Therefore, it is imperative that AEA and AEA-Retired members stay informed about the candidates and issues through this publication and the AEA Advocate as well as the AEA's and AEA-R's websites and Facebook pages. There is a lot at stake in this election, and informed voters have the power to make changes.

PRESIDENT'S MESSAGE

BY LINDA SOMO

As members of an organization composed of retired public school employees from all across the state of Arizona, AEA-Retired members are uniquely qualified to know the needs of Arizona's students. We have seen the catastrophic results for students and public school employees of huge budget cuts to education. Class sizes have ballooned, classroom resources have dwindled, salaries have been frozen, and programs that enrich students' lives, such as music and art, have been eliminated in many districts. As retirees, we know the importance of a well-educated workforce in the economic development of our state. As professional educators, we know the vital role that funding plays in providing a quality education for all students.

Over the past few years, the Arizona Legislature has cut billions of dollars from K-12 and higher education in our state. The only bright spot has been the temporary one-cent sales tax for education that the voters approved in 2010. Unfortunately, that tax is due to expire in 2014, and if we do nothing to help public education, we will see even more draconian cuts that will be devastating to our students and our state. That is why AEA-Retired is supporting the Quality Education and Jobs Act.

By renewing the one-cent sales tax, the initiative provides a long-term, dedicated, stable revenue source for education, so that funding is not subject to political whims. Eighty percent of the funding benefits public education. It helps our schools to implement a rigorous new curriculum and previously unfunded reforms, while requiring strict accountabil-

ity, performance and auditing provisions. It also funds scholarships for university and community college students, invests in career and technical education in high schools and colleges, and ensures children of the working poor receive healthcare coverage through restoring funding for KidsCare, so children of the working poor can come to school healthy and ready to learn.

And finally, it protects state road funds from legislative raids, ensuring that cities and towns don't have to divert funds away from police, fire, and other city services to fund road repair.

At press time, the Campaign has gathered enough signatures to be placed on the ballot. If

you signed a petition or carried a petition to get others to sign, THANK YOU. But now the real work begins. Public polls have shown that Arizonans overwhelmingly believe that quality public education is critical to the economic growth of our state and to the future of Arizona's children. Talk to your friends, neighbors, family members, church members, and everyone you meet about the importance of voting for this vital initiative.



President Linda Somo



A Good Reason to Join AEA-Retired



Dr. Janie Hydrick

We present to you Dr. Janie Hydrick. Janie is a 46-year veteran teacher and has taught every level from elementary to graduate school. She serves on the AEA and NEA Boards of Directors and knows our issues inside out, upside down, and backwards. She will join us next year in AEA-Retired.

Janie has taken the bold step of choosing to run for Arizona State Senator from (new) Legislative District #18.

Janie is taking on long-time incumbent Senator John Mc Comish, who has never been challenged before and enters the contest with a large residual war chest. Hydrick started from zero and must raise at least \$100K to be competitive. AEA-Retired Secretary Julie Horwin is Janie's campaign manager.

Delegates to this year's AEA-Retired Annual Meeting recognized the need to get Hydrick elected and took the unprecedented step of endorsing a candidate for a state race.

Please visit her web site at www.HydrickforAz.com to view her qualifications and make a donation to the campaign. We must support our own if we are ever to affect legislation.

Full disclosure: Janie is married to AEA-Retired Vice President Frank Bing.

Annual Meeting, April 27, and Delegate Assembly, April 28

As was reported on page one, the Annual Meeting and Delegate Assembly were both great successes. Here are some photos from the meetings. An informative, good time was had by all. Perhaps next year, you'll run for delegate and your photo will appear on these pages.



Photos from the Annual Meeting and the Delegate Assembly. Will we see your picture here next year? Start planning now.



NEA Western States Organizing and Leadership Conference, Las Vegas, NV

This year, NEA-R consolidated the six regional leadership conferences into just two, Eastern and Western. The Western conference took place in Las Vegas, and AEA-Retired sent our largest delegation ever (see photo below). The trainings offered were diverse, and our delegation learned a great deal. Here is a photo of the AEA delegation and some reports back to you from the participants.



I attended a workshop session on "Recruiting and Organizing Through You Tube." AEA-R is working diligently to recruit members and I thought I might get a few more ideas on recruiting from this workshop. The NDEA Retired President shared information that North Dakota uses to recruit members. They produced a You Tube video with a grant from NEA. Even though they had grant money, the video was very expensive. I believe they said it cost a \$1000 a minute and it was a ten minute video. In my opinion only, I felt it was too dark and not enough pizzazz! The 2nd part of this same session was very informative. It was led by the staff liaison from NSEA-Retired, Maureen Nickels. She shared a lot of information about how they plan and organize their annual meeting with a conference at the same time. They have their meeting and then have break out sessions for the attendees. I thought the idea was great. The topics of the sessions include much of the same information that we use our speakers for at our meeting. She is going to share her information with me as soon as I email her. It might be something for us to try in the future.

Judy Moy, AEA Board member, AEA-Retired

My first NEA Retired Conference inspired me as I saw over 300 NEA Retirees still promoting public education and helping new teachers as mentors. The four workshops I attended on membership and benefits were helpful and I will use these strategies to recruit and retain members. Lily Eskelsen, NEA Vice President, spoke to the group and played her guitar and sang her union songs.

Nancy Putman, AEA-Retired Board member

The highlight of the NEA Retired Conference for me was learning about the many benefits available to our members through NEA Click and Save online. I have always tried to avail myself of the benefits to members, but now I know about so many more options

I can use in the future. I am eager to share this information with my fellow chapter members in the near future.
Suzan Austin, AEA-Retired Board member

I found that interacting with other members of NEA-Retired from all over the country was the most beneficial aspect. I participated in the Political Track at the meeting. I found that listening to what has been happening as far as attacks on public education and especially public education employees very enlightening. The attacks have also included our retiree pensions in various forms around the nation. The most interesting session was the one conducted by the representatives from Ohio. They discussed how they fought back against the their Governor's dismantling of their collective bargaining rights. The part that the Ohio retired teachers played was instrumental in their success. It gave me hope for working on some of the attacks we have been experiencing here in Arizona. Overall, it was a very worthwhile experience and look forward to using some of their ideas here at home.

Steve Linder, AEA-Retired Board member

I was really impressed by our Vice President of NEA, Lily Eskelsen. I don't want to quote her very impressive bio in our packet from the conference. We should make sure all the AEA-Retired get a copy. The fact that she incorporates her vocal/instrumental music into her speech is a plus and a great organizing tool. She writes a blog called "Lily's Blackboard" in which she covers the latest education issues.

Lucinda (Cindy) Michels, AEA-Retired Board Member

My apologies to those whose articles were not published for lack of space. We'll place the remaining articles in our next e-newsletter. FB

News and Views You Can Use



AEA-Retired Delegates Head to DC

Three AEA-Retired members will join Ex-Officio Delegates

Linda Somo and John Campbell (who are members of the NEA Board of Directors) as delegates to the 2012 NEA Retired Annual Meeting June 27th – 29th,

and the NEA Representative Assembly June 30th – July 5th in Washington, DC.

AEA-Retired members voted online in February and March to elect

Frank Bing, Julie Horwin, and Barbara Matteson to represent us at those important meetings. These five voting delegates will be



joined by the following additional AEA-Retired members at the Annual Meeting: Suzan Austin, Jean Stephenson, Kathy Campbell, Ken Freed, Marilyn

Freed, Judy Moy, Nancy Putman, Shirley Boswell, and Maryanne Goodluck. Annual Meeting

attendees will participate in a variety of information and leadership experiences that will further train them to be effective leaders in our

Association. Elected delegates will be helping to set the course for the next year for NEA-Retired and the NEA.



NEA Retired Lifetime Dues to Increase

Are you one of the lucky ones who pre-paid the NEA Retired portion of your dues with a one-time payment when you retired? Perhaps you joined when it was just \$100, or the current \$200. If so, you have avoided dues increases in that part of your retired dues and have saved money during your retirement. If you are still paying dues on an annual basis to all three parts of your dues (NEA/AEA/AEA-Retired), it's not too late to lock in a one-time payment to NEA Retired before the Lifetime dues increase to \$250 on September 1st of this year.

By making a one-time payment of \$200 now to NEA, that portion of your dues will be paid up for the rest of your life. Thereafter, you will only pay the AEA and AEA-Retired portion of your dues, which are **due to increase \$5 each for a total of \$30 each annually**. Instead of \$90 annually, your dues will only be \$60 annually if you choose to pay the one-time Lifetime NEA Retired payment of \$200 before September 1st.

Moreover, if you have not yet selected "Pension Deduction" for your method of payment, doing so now will entitle you to a one-time \$10 rebate. Pension deduction frees you from having to renew on an annual basis and, as a result, only \$5 per month (\$7.50 for all three portions) will be automatically deducted from your pension check each month.

For more information, contact Membership Chairperson Shirley Boswell at 602-696-2458, or Linda Somo at lsomo@cox.net.

Chapter Mixer, Technology Training for Members

VALLEYWIDE CHAPTERS MIXER A SUCCESS: MEMBERS LOVED IT! By Suzan Austin

What started as an answer to the question, "Where can we hold a chapter meeting so Julie can present some technology information?" blossomed into a lunch meeting of 30 members from across the valley held on May 21.

Suzan Austin, Scottsdale/Paradise Valley Chapter Chair, was determined to answer the request of her members for information on Facebook and Skype, but also saw an opportunity for a social gathering with other valley chapter members. After confering with the chairs of the other valley chapters;



and the Board. A great lunch was provided through an NEA Grant, and door prizes were donated by Julie Horwin, Susan Sain, and Suzan Austin.

The meeting was a fun combination of social networking, legislative updating, and volunteer opportunities, along with technology information. The participants were able to bring their computers, phones, tablets, etc. and get one-on-one help using Facebook and learning how to access Skype. Everyone had the opportunity to talk to old friends and make some new ones. The feedback was so positive that another valley wide meeting is on the horizon.



Barb Joseph from Phoenix, Susie Sommer from the West Valley, and Steve Ramos from the East Valley, she booked the boardroom at AEA for the group. Suzan sent out an invitation to the members of all the valley chapters



AEA-Retired members featured again in *This Active Life*, NEA-R's Magazine

Two AEA-Retired members were featured in the latest issue of NEA-R's magazine for retired members. **Mary Bishop**, a founding member of AEA-R, and **Julie Horwin**, the current Secretary,

were quoted in an article about increased use of technology by retired members. Julie has become an NEA technology guru, giving trainings to NEA members nationwide.

This continues a

trend of many of our members appearing in the publication. In the past few years, there have been appearances by **NEA-R Past President Barb Matteson, Juan Zuniga, Frank Bing, John Campbell, Brenda Pierce**, and pre-retired member **Rachel Stafford**.



Mary Bishop



Julie Horwin



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AEA-Retired Chapter News

Chapters are a way 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 Chairperson **Gary Mehok** at LOJO40@cox.net. We would love to have more chapters so members don't have to travel so far.

The info below provides basic info on current chapters; the September issue will give meeting schedules through December. You can also contact the chapter chairs at the phone numbers and e-mails provided below.

Glendale/West Valley Chapter- All members are welcome at our meetings. The next meeting will be at Iron Works Restaurant, 17233 N. 45th Avenue, Phoenix. For more information call Susie Sommer at 623-931-6209 or e-mail ssommer114@aol.com

Mesa / East Valley Chapter: The next scheduled meeting is at the Sunrise Bank Bldg., 63 E. Main Street in Mesa. Contact **Steve Ramos** at steveramos2@cox.net or (480) 924-0771 for information.

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.

Phoenix Chapter: For information 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: The chapter chair is Ted Coleman. Reach Ted for more info at tdashfork@azwildblue.com or at 928.856.9135.

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

Scottsdale/Paradise Valley Chapter: This chapter meets at Macayo's on N. Scottsdale Rd. from 11AM-1PM. For information contact **Suzan Austin** at (480) 947-2089 or visit <http://www.azedretired.com/SCOTTSDALE/index.html>.

Southeast Chapter: Please RSVP to Chapter chair Sally Rosen azcatsally@aol.com.

Northern Arizona/ Rez Chapter: This chapter meets at the Thunderbird Cafeteria in Chinle. Contact **Maryanne Goodluck** at magoodluck55@yahoo.com for further details.