



# THE CONDUIT

Volume 26, Issue 3

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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/aearconduit0212.pdf](http://www.azedretired.com/Documents/Conduit/aearconduit0212.pdf) and set the size to 200% or more.



## AEA Retired Calendar

- February 29– AEA Lobby Day at the Capitol
- March 2– NEA Read Across America Day. Read to a child!
- March 14– AEA Retired Board of Directors, AEA HQ
- March 28-30—NEA Retired Leadership Conference, Las Vegas, NV
- April 27—AEA Retired Annual Meeting, Mesa Marriott
- April 27-28—AEA Delegate Assembly, Mesa Convention Center

## AEA-Retired Annual Meeting, April 27 at Mesa Marriott Conference Center; join us for great, informative speakers, a terrific lunch and help set the direction for *YOUR* association

Mark your calendar now to join your fellow AEA-R members at this year's Annual Meeting. Our speaker list is impressive, we'll have interactive activities for you to help guide YOUR association, and lunch will be great, (Oh, and don't forget the legendary AEA-R Happy Hour at the end of the day!)

Our keynote speaker this year is **Paul Matson**, Executive Director of the Arizona State Retirement System. Paul will bring us all up to date on retirement issues, and will answer any questions we have about the retirement system here in Arizona. He is always well-received as a presenter.



**Paul Matson**

Another great, and very informative, speaker will be **Jennifer Loredo**, chief lobbyist for the AEA. Jennifer deals with the state legislature every day; she will bring us up to speed on what bills are having the biggest impact on public education and on retirement issues. She is well-respected at the legislature, and no

doubt, had a hand in the contribution rate being changed back to a 50-50 split between employees and employers.

Our featured luncheon speaker is AEA-Retired member **Pam Simon**, former staff member to Congresswoman Gabby Giffords. Pam was one of the people who was wounded during the tragedy in Tucson last January. Pam addressed us last year by video, but this year, we are lucky enough to have her coming in person.

**Pam Simon** was visited by the President and Mrs. Obama during her recovery



**Jennifer Loredo**



*Continued on page 2*

## *It's time to vote for your NEA-RA Delegates*

All AEA-Retired members are strongly urged to vote for our representatives to attend the NEA Representative Assembly, June 30 – July 5 in Washington, DC. AEA-Retired is entitled to **three delegates**, with eight members vying for those positions: Frank Bing, Maryanne Goodluck, Julie Horwin, Ken Freed, Marilyn Freed, Barbara Matteson, Gary Mehok and Jean Stephenson. You can read each candidate's statement in the next issue of the *AEA Advocate*.

Members can vote online at any computer by going to the AEA website, [www.arizonaea.org](http://www.arizonaea.org), and clicking on "NEA RA Vote Online" button on the right. Login by using your full name and the last four digits of your Social Security number. Those who might prefer to vote by paper ballot can contact Chris Mayer at 602-264-1774 or 800-352-5411, ext. 143, to request a ballot be sent to them. All votes must be received between February 13 - April 10. Don't miss out on this opportunity to participate in the democratic process.

## ARIZONA STATE RETIREMENT SYSTEM UPDATE

BY STEVE RAMOS, ASRS CHAIR

### ASRS deals with fallout as anti-public employee union bills continue to be pushed by GOP-controlled Arizona legislature

Steve Ramos



The legislature is back in session and both ASRS and AEA-Retired are working to represent you as both educators and retirees. A set of 4 bills attacking public employee unions has passed out of committee on a party line vote and is headed to a full vote of the Senate. Sen. Andy Biggs, a Republican from Gilbert, and Sen. Rick Murphy, a Republican from Peoria, are the sponsors. A bill

that eliminates a union's right to "meet and confer" (SB 1485) is very disturbing.

The source of this bill, the Goldwater Institute, reports that without union bargaining, the state could save \$550 million a year by holding down employee demand for higher wages and benefits. Along with the devastating effect this would have on working educators, it also could increase the liability of the ASRS fund and slow its return to a 100% funded status.

Bills that would change the ASRS from a "defined benefit" system to a 401k-type "defined contribution" system continue to be introduced in both houses. Rep. David Burnell Smith, Republican from Carefree (HB 2745), and Sen. Frank Antenori, Republican from Vail (SB 1321), are the sponsors. Both are ignoring early conclusions from the Governor's DB to DC study committee that show a DC system being both more expensive and having an increased risk for ASRS members.

Finally a very important bill (SB 1194) deals with the relatively new problem created when ASRS employers are privatized, go bankrupt, or for some other reason are forced

to leave the ASRS system. Since the ASRS system is only approximately 78% funded, these employers leave owing ASRS money. The bill requires ASRS to establish a formula to determine that liability and create a method of collection.

Have you created your own ASRS website account? It is easy to do. As more members have access to computers the ASRS is continuing its efforts to make more information available online and allow members to interact with and make changes to their accounts on the ASRS website; <https://www.azasrs.gov>.

You can now find a real time Legislative Bill Tracker there. Also expect to see more email communications coming from ASRS.

Many continue to express concern about health care costs. I believe nobody works harder than ASRS to hold health care costs down for members. ASRS is currently looking into the costs and risks of moving to a "self insurance" plan in 2013 or 2014.

AEA-Retired was pleased to see a return on ASRS investments of 25% for the last fiscal year ending on 6/30/2011. So far this year has not been as rewarding. Up to this point in FY 2012, ASRS has a return of -2% and total funds are at approximately \$26 million.

As we go to press, we have learned that a lawsuit filed by AEA against the State, challenging the constitutionality of a law that changed the ASRS employee contribution rate split from 50/50 to 53/47 percent, has been decided in AEA's favor. Thanks to the efforts of AEA Retired leaders in 1998, AEA lawyers were able to constitutionally defend our pension system from the state legislature's attack. (see related story by Barbara Matteson on page 4).

**Steve Ramos is the AEA-R ASRS Coordinator.** He can be reached at [steveramos2@cox.net](mailto:steveramos2@cox.net)

### Annual Meeting (*cont'd from page 1*)

We look forward to Pam's thoughts and insights on a variety of issues.

Our final speaker will be Linda Torkelson of Communities in Schools who will speak briefly about CIS. Retired Educators are deeply committed to the success of every student. That's why NEA-Retired members across the country are teaming with parents, principals, community organizations and elected leaders through NEA's Priority Schools Campaign, focusing attention on raising student achievement in struggling schools. AEA-Retired voted at last year's Annual a meeting to partner with Communities in Schools. C.I.S. is a statewide network of passionate profession-

als working in public schools to surround students with a community of support, empowering them to stay in school and achieve in life.

Certified AEA-Retired Delegate Assembly delegates will vote on AEA-Retired Vice President and three (3) at-large members to the AEA-Retired Board of Directors.

Don't forget to send your registration forms (on page 5) and your registration fee by April 11. We need to let the conference center know how many will be dining and what they have ordered. The 2012 AEA Delegate Assembly will be held April 27-28, 2012 at the Mesa Convention Center and the Marriott Mesa hotel. If you are attending only the Annual Meeting and wish to stay overnight before travelling home, The Mesa Marriott offers a special

*Continued on page 3*

# PRESIDENT'S MESSAGE

BY LINDA SOMO

Many years ago someone asked me why I chose to join a union. I immediately responded that since I was passionate about my profession, I wanted to have a voice: a voice in what materials I could use teaching my students; a voice in how large my classes could be; a voice in how my day was structured; a voice in how I would be compensated or what benefits I could earn; and a voice in hundreds of other aspects of my job. All of that was made possible by belonging to my union and supporting their efforts to represent employees in the "Meet & Confer" process.



President Linda Somo

Since we live in a "right-to-work" state, school districts are not required to negotiate with their employees. They do so voluntarily, usually at the urging of the local association of the AEA. Additionally, membership in the union was (and still is) strictly voluntary. No one ever tried to twist my arm to get me to join. I recognized the value of membership and how it helped to shape my profession, not only for my benefit, but also for the benefit of the students and families that I served.

With that being said, you can imagine my shock and horror that our state legislature is trying to prohibit school districts from bargaining with their employees. SB1485 seeks to prohibit any collective bargaining actions, and would even prevent an employee from talking to school board members to try to solve a problem. It would totally eliminate a school board's ability to choose to negotiate with their employ-

ees. At press time, this bill, along with three others (SB1484, SB1486 & SB1487) passed the Senate Government Reform Committee and are headed toward passage in the full Senate. Unlike last year, when only education employees were targeted with union-busting bills, these bills are aimed at all public employees.

This is blatant union-busting in its worst form. Those who support these bills are trying to silence our voices and take away our ability to impact our own profession. Similar bills have passed in Wisconsin, Ohio and Indiana resulting in massive demonstrations, recall elections (for the Wisconsin Governor and some state legislators), and a successful Ohio ballot initiative which overturned the elimination of collective bargaining. What will Arizona public employees do? Are we prepared to fight for our rights? I pledge to do whatever it takes to protect what we all worked so hard to accomplish --- quality public education for all of Arizona's students and a voice in how to make that happen. I hope you are with me.

## A Good Reason to Join AEA-Retired



Shirley Boswell

Shirley handles one of the toughest jobs in AEA-Retired, that of membership chairperson. It's a year round task which requires lots of bookkeeping, doing mailings, and keeping track of dues. Not many people could do the job half as well as Shirley does it.

Shirley is a long-time association activist. She participated in AEA's Emerging Leaders training and following that, held all officer positions except treasurer in the Marana Education Association and also served on the AEA Board of Directors and multiple AEA Committees.

Shirley serves on the AEA-Retired Board in addition to her membership responsibilities. She remembers fondly a time when locals worked together for the common good.

We're lucky to have her.

## Annual Meeting (cont'd from page 2)

\$119 hotel rate for AEA through April 3, 2012. (make your reservations between now and April 3, 2012). Online reservations can be made using Group Code "aeaaeaa". <http://www.marriott.com/hotels/travel/phxmm-phoenix-marriott-mesa/> Annual meeting participants pay for their own hotel rooms if they choose to stay over until Saturday. We will attempt to find other hotels in case the Marriott fills up. The address of the Mesa Marriott Conference Center and Hotel is 200 N. Centennial Way, Mesa, AZ 85201.

## Guest Articles from our members

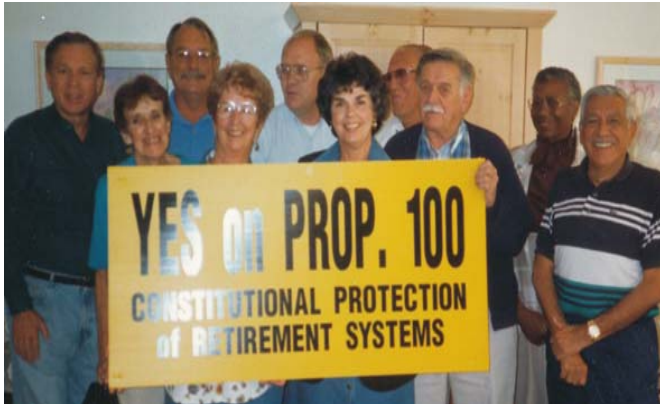
### Member action at its best – You never know how far-reaching your union efforts may go

Guest Article By Barbara Matteson

The recent court decision ruling stating that changing pensions payments is unconstitutional made me reflect on how we obtained constitutional protection for our retirement fund.

In 1997 Bev Cuthbertson, then AEA Retired president, Bob Bloom and I attended an NEA Retirement and Benefits Forum. There we heard a report on how Montana had won constitutional protection for their system.

Bev brought that information back to Arizona and AEA-Retired immediately began work on doing the same thing in Arizona. First, we successfully formed a Coalition of other groups that belonged to the ASRS Retirement Fund. Next, we asked AEA President Kay Lybeck to request a \$10,000 grant from NEA to organize a campaign to win constitutional protection.



We met with Senators Ruth Solomon (D) and Marc Spitzer (R) to ask them to help convince the legislature to put a referendum on the ballot that would provide constitutional protection for ASRS. Then, we hired an attorney, Cindie Moore, whom we had met at the NEA Retirement Forum; she provided language for the referendum.

All of these things came together. We received the grant from NEA; our Coalition was formed and went into action. Senators Spitzer and Solomon helped get the referendum on the ballot, and AEA provided in kind help and support that gave essential information to the voters.

This combined cooperative effort was successful. Prop 100 was the first referendum on the 1998 state ballot and it passed overwhelmingly!

Having constitutional protection for our retirement system has helped prevent a lot of bad things from happening to our benefits over the years. Our constitutional protection amendment certainly played a part in the recent court decision that ruled against changing employee contributions to the system and shows that the hard work of our UNION paid off.

Barbara Matteson is a longtime AEA-Retired member, and the immediate past-president of NEA-Retired. She can be reached at [bmatteson@dakotacom.net](mailto:bmatteson@dakotacom.net)

### A Secret Weapon

Guest article by Elizabeth A. Hendrickson

Back in the 1970's I had an enlightening discussion with a woman who, by the way, was the second woman to be elected to the North Dakota Legislature. The woman was eminently practical, sensible and down-to-earth, so her observations carried a lot of weight.

She was talking about being contacted by constituents. I had given the subject zero consideration up to that point. How did one get in contact with an elected official in those pre-answering machine, pre-voice-mail, pre-email, pre-internet, pre-tweet, pre-cell phone, pre-instant messaging days?

The least effective method was a phone call because it takes very little effort on the part of the caller and puts all the work of action on the receiver of the call. What are you going to do, is the not-so-subtle implication? Putting a politician, *or anyone*, on the defensive is stupid and arrogant.

Next, on the list of useless methods were mass mailings; the sponsoring group collects money, prints postcards or letters and the members mail them off. Again it put the receiver in a bad position and what sort of work did the mailer put into it. Not much. It was just numbers from a particular group.

Some letters, according to the legislator worked but others didn't hit the target; single-spaced, pages-long rants translated as "nut-case", as did hand-written page after page, usually in tiny hand-writing, on binder-paper.

What did work? A well-written, to the point, thoughtful letter which stated the problem clearly, and as a bonus, also offered a solution. To a legislator, or any politician, it translated as, *may I work with you on this?* That's a real compliment and politicians love *real* compliments.

Writing a good letter, just as writing anything, takes work. It takes time. It takes consideration and respect for the people or persons who will read your letter. It tells the recipient that the writer respects the politician enough to believe that they can help with this problem. A well-written letter speaks to the dignity of all involved.

About the legislator from North Dakota? That was my late mother-in-law, Elynor M. Hendrickson. She would be pleased to know that her wise advice lives on.

Elizabeth A. Hendrickson is a retired educator and AEA-Retired member.

She can be reached at [beagletalk@gmail.com](mailto:beagletalk@gmail.com)



## AEA-Retired Annual Meeting Registration Form

**AEA-Retired Annual Meeting  
 Mesa Marriot Conference Center,  
 200 N. Centennial Way, Mesa, AZ 85201  
 Friday, April 27, 2012 9:30 AM – 3:30 PM  
 Registration Form**

The **\$30** non-refundable registration **fee** is payable by check or money order to **AEA-Retired** and must accompany this form on or before Wednesday, **April 11, 2012**.

Mail to: **AEA-Retired Annual Meeting, 345 East Palm Lane, Phoenix, AZ 85004-1532.**  
 Registration fee & form are required of all members and guests.

Name \_\_\_\_\_

Address \_\_\_\_\_

Zip \_\_\_\_\_

Phone(s) \_\_\_\_\_

E-mail \_\_\_\_\_

\*\*\*Please circle your choice of luncheon entrée so we have an accurate lunch count (uncircled forms will receive chicken):

**Boneless Chicken Breast**

**Flat Iron steak**

**Salmon**

**Vegetarian**

Require or use special accommodations? Yes No

If yes, please help us to make you welcome; explain? \_\_\_\_\_

### Proposed Changes to AEA-Retired Constitution

(Please note: proposed new language is all upper case and deletions are in parentheses. *Certified delegates to the AEA Delegate Assembly* will vote on these proposed changes on April 27<sup>th</sup> during the AEA-R Annual Meeting)

**Article V.                    Officers**

Section 8

In the event of a vacancy in the position of representative-at-large, the President, with the approval of the Executive Board, shall appoint an AEA-Retired member to serve (for the remainder of the term) UNTIL THE NEXT ANNUAL MEETING WHEN THAT POSITION WILL BE ELECTED FOR THE DURATION OF THE UNEXPIRED TERM.

**Article VI.                    Executive Board**

Section 1

d.     The AEA-Retired directorS (Region 18)

Section 2

Representatives-at-Large shall be elected by secret ballot for a term of three (3) years, and may only serve for two (2) consecutive terms for a total of six (6) years. Representation shall be one (1) for each one hundred and twenty-five (125) members OR SIGNIFICANT PORTION THEREOF. The minimum number of representatives shall be fifteen (15). Newly elected representatives shall enter upon their duties immediately following the annual General Meeting. (2)

# Photos from Chapter Meetings and NEA Meetings



Top row: Pics 1 & 2 Carolyn Warner with Julie Horwin, Linda Somo, and Gary Mehok: Pic 3, Congressman Raul Grijalva with Barbara Matteson, Steve Ramos, and John Campbell.

Rows 2 & 3, East Valley Chapter meeting

Row 4, Scottsdale/ Paradise Valley Chapter meeting

Row 5, Phoenix Chapter meeting



**Have you attended a local chapter meeting?** There is a listing on the back page of this Conduit telling where and when the meetings are. Don't have a chapter near where you live? We'd be happy to help you start one in your area. It doesn't take much work, and it is fun to get together for food, camaraderie, and informative speakers. We'll even help you get your speakers. Drop an e-mail to Gary Mehok, our chapter coordinator. His address is on the back page.

We want to give YOU, our readers, a choice in how you receive your Conduit publication. Right now, we're mailing it to all members and e-mailing it to everyone for whom we have an e-mail address.. You may choose to receive it by mail (paper copy), or by e-mail, or both. If you prefer *just e-mail*, please fill out the form below and mail it back.

## Want The Conduit Email Only; No Paper Copy?

All of our members receive the print publication, *The Conduit*.

Each of our members whose email we have will *also* receive an email copy of the pdf version you can download, and enlarge for large print, and have a better look at the pictures.

If you would prefer to receive ONLY the email copy of *The Conduit*, please fill out this form & send:

Name

Home email address

To AEA-Retired: Please send me **only the email pdf copy** of the Conduit. I understand that all members will receive the Conduit both in print and pdf (email.) However, please take me **off of the list to receive a print version of the Conduit**. I prefer to receive only the online pdf version.

Note to those who send in the form: If your email address changes, be sure to update your email address with us, or you will not receive your online copy of *The Conduit*. If you no longer use an email address, and wish to receive the print *Conduit*, please let us know. All members receive both the print version in the mail, and also an emailed pdf version.

Signature

Mail to AEA Headquarters c/o AEA-Retired  
345 East Palm Ln Phoenix, Arizona 85004 Attention: Conduit



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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 Chapters Chairperson **Gary Mehok** at [LOJO40@cox.net](mailto:LOJO40@cox.net).

**Glendale/West Valley Chapter-** All members are welcome at our meetings. The next meeting will be 4:00 PM Thursday, May 3, 2012 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](mailto:ssommer114@aol.com)

**Mesa / East Valley Chapter:** Chapter members met in January to hear guest speaker Joe Rubio from the Valley Interfaith Project (VIP). The next scheduled meeting is Wednesday, March 21 at the Sunrise Bank Bldg., 63 E. Main Street in Mesa. Contact **Steve Ramos** at [steveramos2@cox.net](mailto: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. Next scheduled meetings will be on March 15 at the AEA Southern Region office, April 12 at TEA, and May 17 at the Southern region office

Go to <http://www.azedretired.com/TUCSON/index.html> for more information.

**Phoenix Chapter:** The chapter met on Tuesday, Jan. 24, 2012 at Metro Tech HS in the Culinary Dept. beginning at 10:30 AM. Julie Horwin was the speaker and did a Skype training for the members present. Next meeting is Tuesday, March 22 at Metro Tech. Discussion will revolve around Medicare/ Social Security issues. For information contact **Barb Joseph** at (602) 859-0165 or (602) 765-0788 or [btjoseph@cox.net](mailto:btjoseph@cox.net).

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

**Prescott Chapter:** The chapter met on January 20 at Coco's . Speaker was member LaBeth Pondish, who was recently elected to the board of JTED. Discussion ensued on whether those entering teaching from business or manufacturing should be required to get certification. Next meeting will be on February 17. John Campbell will discuss Social Security issues.

**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 next meeting will be on Monday, March 26, 2012 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:** The chapter met on Wednesday, January 18, 2012, at 5:00 pm at Sierra Vista's My Big Fat Greek Restaurant and had their best turnout ever at 22 members! Next meeting will be at the Manda Le' Restaurant and Lounge, 3455 Canyon de Flores (behind the Diner and McDonald's off Highway 92) at 5:00 on Wednesday, March 28. Please RSVP to [azcatsally@aol.com](mailto:azcatsally@aol.com) . Hope to see everyone there.

**Northern Arizona/ Rez Chapter:** The next chapter meeting will be on Wednesday, February 22, at the Thunderbird Cafeteria in Chinle. Contact **Maryanne Goodluck** at [magoodluck55@yahoo.com](mailto:magoodluck55@yahoo.com) for further details.