



# THE CONDUIT

Volume 24, Issue 1

September/ October, 2009

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**Editor's note:** There are many photos in this issue for you to enjoy. To get a clearer view, go online to [www.arizonaaea.org/pdfs/aear/aearconduit0909.pdf](http://www.arizonaaea.org/pdfs/aear/aearconduit0909.pdf) and set the size to 200% or more.



## AEA-Retired Calendar

September 26-28 — NEA-Retired Advisory Council, Washington, DC

October 13— AEA-Retired Board of Directors' meeting, AEA Building, Phoenix

November 10 — AEA-Retired Board of Directors' meeting, AEA Building, Phoenix

December 15 — AEA-Retired Board of Directors' meeting, AEA Building, Phoenix

January 15-17 — NEA Western Region Leadership Conference, Mesa, AZ

## NEA-Retired Annual Meeting in San Diego; Linda Somo re-elected to NEA Board; Conduit takes top award

The delegates were enthusiastic, the weather was perfect, AEA-Retired President **Linda Somo** was reelected for a final term on the NEA Board of Directors, and the Conduit came home a winner. AEA-Retired was very well represented as we had ten members as registered delegates to the NEA-Retired Annual Meeting. (See photo on page 4) All of your representatives participated in the Outreach to Teach activity, a joint effort of the NEA Student Program and NEA-Retired. What makes this volunteer activity a little more daunting is that we have to be in our hotel lobby by 6:30 the first morning in order to board the busses. That's dedication!

AEA-Retired president Linda Somo was eligible for one more term on the NEA Board of Directors representing retired. She won easily and will have 3 more years to represent us at NEA.

In addition to Outreach, our delegates were very active working on new business items and helping out with fund raising activities. Also, we each attended sessions to improve our skills as your representatives.

In an unexpected moment at the end of the first business session, your AEA-Retired newsletter, **The Conduit**, was awarded first place in the annual competition for best established newsletter by a state retired association. (see the story and photo on page 5).



(left) Kathy and John Campbell and Linda Somo, and (below) Barbara Matteson prepare for the day's activities at the RA.

If you'd like to share in the excitement of the RA, visit the following website to view videos and photos of speeches and activities, as well as the results of new business.

[www.nea.org/grants/1357.htm](http://www.nea.org/grants/1357.htm)



## Outreach to Teach gives makeover to elementary school in San Diego

As is the case each year, the NEA Student Program and the NEA-Retired joined hands in one of NEA's most visible community outreach projects. Outreach to Teach selects a deserving school each year in the RA city and refurbishes it. AEA-Retired had a strong presence at this year's event (see photo essay on page 4).

Hundreds of volunteers descended on the school and completed a variety of tasks including

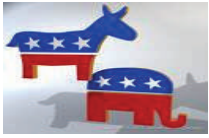
planting trees and plants, laying sod, assembling furniture, painting, putting up bulletin boards, repairing rest rooms, upgrading the teachers' work room, labeling and placing of new books in the library, painting murals, etc.

This year's recipient was Balboa Elementary School in San Diego. The principal and many of the teachers and support staff were there to work with the NEA volunteers. All expressed gratitude for NEA's help.

A real treat for those of us who attended was a home made Mexican food feast prepared for lunch by the parents of Balboa students. Yum!



NEA Student president Jemaine Coleman and NEA-Retired President (and AEA-Retired member) Barb Matteson



## LEGISLATIVE UPDATE

BY STEVE LINDER, LEGISLATIVE CHAIR

**Breaking News:** This article was written prior to the governor's signing of the GOP-only budget. She signed parts of the budget and vetoed others. Some



was positive for us; some was damaging. For the latest info, [www.azedretired.org](http://www.azedretired.org), the AEA-R website, is your best source.

Steve Linder

As of the writing of this article, there is a budget sitting on the desk of our governor. She has three days to decide what to do with it. It represents the most anti-child, anti-education and anti-public education employee budget ever conceived. Most of the anti-employee lan-

guage in the bill is a direct result of the actions taken by AEA during this session. Because we were very vocal and very visible during this session, they would like to punish us by taking away some of our rights to lobby and stand up for the children of Arizona. In their way of thinking they believe this will silence us if employees are not able to be released from their jobs to watch the damage they create at the legislature. Nothing could be further from the truth.

We are the one group that certainly has nothing to fear from these "bullies". I was very proud of the number of retired members who took the time to be at the capitol, who took the time to meet with their legislators, and if not able to be there in person, contacted them through e-mails and phone calls. They

know we are out here, and we must take up the slack for our active members who cannot leave their jobs and increase our presence at the legislature.

This session may be over, but there is another full session beginning in January 2010 to get through before the next election cycle. We should already be gearing up for our actions in 2010. Who knows what damage this backward thinking group can create in the future? We should always be on the lookout for some pro-public education candidates, regardless of political party, to run against these creators of damage. As we move into autumn and winter, please keep active in your chapters and I look forward to contacting you to help with developing our plans for the future.

### Technology Changes At ASRS, How Will They Affect You? By Steve Ramos, ASRS Chair



Perhaps the most significant change at the Arizona State Retirement System this summer was the completion of the technology upgrade. This will provide members with significant improvements in ASRS services at lower costs.

To keep up with future changes at ASRS, members need to have completed their own technology upgrade by arranging to have access to the Internet. If you do not have access in your home computers are available at most libraries and community centers

ASRS members will find a new user-friendly website online. By creating your own personal account and password you will have improved access to your ASRS file and future notifications. It is always in your best interest to make sure your personal information is accurate. That can now be done easily online.

The ASRS would like to reduce or phase out monthly benefit statements, sent to members and beneficiaries through the U.S. Mail. If you would like to "opt out" in favor of email statements, let ASRS know at their website.

The *Financial Horizons* newsletter will now be mailed only once each year. You should have already received the most recent Summer 2009 issue. Please look this issue over care-

fully. It has detailed explanations of changes that may affect you and your beneficiaries. The Comprehensive Annual Financial Report will now only be available online. Finally, ASRS will send out your Annual Statement in late September 2009. ASRS is "contemplating" making future statements available only online.

At the legislature, ASRS proposed changes to the "plan design" that would help contribute to a more stable retirement system. Most of those proposed changes got lost in the acrimony of the budget battle that was never ending at the capitol. House Bill 2118 did pass and becomes effective on September 30, 2009. Most changes effecting retired members concern those who return to work with an ASRS employer after retirement. Details of HB 2118 can also be found in the ASRS Summer 2009 issue of Financial Horizons.

We all remain concerned about the health of the economy and how that effects our retirement system. Since ASRS wisely remained with a "defined benefit" plan over time, members will never see a decrease in their monthly checks. Our biggest concern involves the ASRS permanent benefit increase (PBI) formula. The PBI, which was designed to give retirees some protection from inflation, requires better than a 9% return on investments to trigger an increase in benefits. The ASRS fund is making a comeback but a PBI may still be years away. At the August 21, 2009 Board Meeting, reports showed the fund at approximately \$21.8 billion.

(Continued on page 6, bottom)



# PRESIDENT'S MESSAGE

BY LINDA SOMO

## Welcome new retirees

Congratulations to all new retirees, and thank you for choosing to continue membership in your professional association. The beginning of this school year may have seemed strange to you as you learn to adjust to your new-found freedom. However, you can stay connected to your profession through AEA-Retired. **Check the last page of this issue for information on a local chapter meeting near you.** If there is no chapter in your area, we can help you start one. Contact **Gary Mehok** (see back page) for more information. This is your personal invitation to participate in your association whether it's through attending chapter meetings to socialize with your friends and Pre



colleagues, serving on a committee or the Executive Board, volunteering, mentoring a new teacher, or lobbying for senior issues and public education. You can be as active (or as inactive) as you wish. For more information, contact me at [lsomo@cox.net](mailto:lsomo@cox.net) or (602) 574-1473.

Welcome back also to all continuing members as we begin a new school year. With your help and input, your AEA-Retired Association has been busy planning for the future.

## And the survey says....

Many thanks to those of you who took the time to respond to the survey that we conducted online and through the last issue of *The Conduit*. Your help in completing those surveys is invaluable to your elected leaders as we plan for meeting the needs of existing members, as well as future retirees, over the next five years. Members who attended our Annual Meeting last April helped us to develop the survey questions and began the strategic planning process. Thirty-five members and elected leaders met in July to review the results of those surveys, and with the facilitation of NEA staffer **Barby Halstead-Worrell** began formulating a Strategic Plan. This process will continue throughout the year with the Executive Board members.

Some of the responses to your surveys reinforced that you want us to continue certain programs. But some responses surprised us

and caused us to question how we can better serve you. **The top "Most Important Advantages of Belonging" according to current retirees are:**

- ASRS information
    - Political information/Action
    - Communications
    - Presentations
    - Member Benefits
- Local Chapter meetings  
There was nothing too surprising there. These have been the soul of our organization. When asked how satisfied you are with AEA-Retired in specific areas, you gave **high marks** to **ASRS Information, Political Activities, and Member Benefits & Discounts**. But you only **rated as average** your satisfaction with **Local**

**Chapters, Opportunity for Leadership, Social Networking, and Membership Outreach.** Given a forced choice on how to spend our resources from a **limited budget**, **your top choices were Engaging Members and Leadership Opportunities.**

The demographic information told us that: 58% of those who responded to the survey are in the age range of 50-59; 70% are female; 47% work at least part time outside the home; 39% work full time; only 14% said they are retired full time; 60% have been retired less than 5 years; and the great majority of our membership is concentrated in the metropolitan areas.

Some key areas kept emerging from analysis of the survey results and through our strategic discussions:

- Membership outreach (especially to rural areas and ESP members)
  - Member communications and engagement
  - Social networking opportunities (especially through expansion of Chapters)
  - Involvement in community activities
- Political power

These areas will be the focus of our ongoing strategic planning. We will continue doing what you told us we do well, while developing programs that you said are needed. Watch

## Kotterman running for Superintendent of Public Instruction; receives AEA endorsement

AEA Past President **Penny Kotterman** has thrown her hat in the ring for SPI. Her classroom experiences, association leadership, and work at the K-12 Center position her as the most knowledgeable candidate.

Delegates to the 2009 AEA Delegate Assembly gave her a ringing endorsement.

As retirees, we can help Penny by phone banking. Watch our new website, [azedretired.com](http://azedretired.com) for opportunities.



Penny and NEA President Dennis Van Roekel

## A Good Reason to Join AEA-Retired

### Ken Freed



Ken has been an association leader for his entire career. He filled every local position in Tucson EA, as well as serving with distinction as a board of directors member for both AEA and NEA.

Ken's wife, Marilyn, is also a long time association leader, and his son Jason is now filling association leadership roles in TEA.

Ken's granddaughter, Lily (cute, huh?), became AEA's first Associate member in that new category.

for more information throughout the year. (For complete survey results go to our new website at [azedretired.com](http://azedretired.com))



## *NEA-Retired Annual Meeting, Outreach to Teach, and NEA Representative Assembly; AEA-R was there and well represented*



**Outreach to Teach** is a joint project of the NEA Student program and NEA-Retired. Each year, they refurbish a school in city where the RA is held. Schools compete for the honor of being selected. This year, we went to Balboa Elementary School in San Diego.

As you can see in the photos above, we were well represented with 10 AEA-R members. L. to r. in group photo: Doni Ramos (Steve's wife), Steve Ramos, Frank Bing, Jean Stephenson, Julie Horwin, Gary Mehok, Linda Somo, Kathy Campbell, Barbara Matteson, John Campbell, Judy Moy

We worked hard while having a good time.



Whether you looked left or right out your window, it was quite a view from the NEA-Retired hotel, the Manchester Grand Hyatt



Top, left: John and Kathy Campbell, Linda Somo, and Steve Ramos at an NEA-R general session; Left: Julie Horwin debates a new business item on technology; Above: Linda Somo, AEA-Retired president, makes a point during her presentation to NEA-R delegates

### **NEA-Retired Annual Meeting and Representative Assembly**

Beautiful downtown San Diego was the venue for this year's NEA-RA. Delegates were treated to stimulating discussion and great weather. Next year, the RA will be in a rebuilding New Orleans.



AEA-Retired delegates to the NEA-R meeting were joined at dinner by NEA Vice president Lily Eskelsen and her mom, Chili. Top row, Lily, Gary Mehok, Gary Somo, Linda Somo, Barb Matteson, Frank Bing, Bottom row, Chili, Kathy Campbell, John Campbell



The NEA-RA received a visit from new US Secretary of Education Arne Duncan. AEA President John Wright (left) appeared on a panel with Duncan (right) which was attended by over 5000 of the registered delegates. It was a good learning experience for Duncan.



## ***AEA-Retired: News and Views You Can Use***

### ***The Conduit*** wins NEA-Retired newsletter award; also receives AEA awards

Our AEA-Retired newsletter, *The Conduit*, won first place in this year's NEA-R newsletter competition for established newsletters. This is the third time AEA-Retired has taken home the award during our twenty years of publishing. That qualifies us to be placed on the NEA-Retired Hall of Fame newsletter plaque.

Co-editors **Suzan Austin** and **Frank Bing** were surprised and delighted when the award was announced at the opening session of the NEA-Retired Annual Meeting in San Diego. Suzan commented that "It's a great way to finish my tenure as editor of the Conduit. It's quite an honor to be selected best in the country." Frank added, "We try to make every issue relevant and useful to our members. This award will motivate us to continue seeking out those issues which help our members on a day-to-day basis."

The Conduit also received four AEA School Bell publications awards for Overall Excellence in Writing, Photography, Design and Layout, and Newsletter.

Right: Frank and Suzan holding the plaque and receiving the applause of the NEA-R Annual meeting



### ***Your 2009-2010 AEA-Retired Board of Directors***

Front row: Barbara Matteson, Kathy Campbell, Julie Horwin, Linda Somo, Jean Stephenson, Frank Bing, Marion Pickens. Back row: Ken Freed, Judy Moy, Gary Mehok, AnnJi Craig-Wooten, Aurora Aber, Juan Zuniga, Brenda Pierce, Daina Swinford, Steve Ramos, Steve Linder; not pictured Suzan Austin.

Note: Since the Annual Meeting, Marion Pickens, Helen Arnold and Paula Grigsby have all resigned their seats due to conflicts with other obligations or personal reasons. Shirley Boswell, Cindy Michels and Mark Rosin have been appointed by President Somo to serve one year terms.

### ***AEA-Retired ASU IMPACT group holds first meeting of the year***

The AEA-R mentoring group which works with ASU held their first organizational meeting in early September. Coordinator Linda Thieken declared the meeting a great success. Participants were treated to several group activities led by Julie Horwin. Everyone seemed to enjoy the activities, and a number of the students said they'd be using them in their classrooms. Everyone then enjoyed a meal together to complete a fun and informative evening. Mentor-protégée pairs set up plans for the semester.



### ***Let us hear from you, the member.***



What's on your mind? What can we do to serve you better? How do you feel about current events relevant to retirees? Health Care Reform? ASRS issues? Rural vs. Urban issues in Arizona?

Drop us a line. We'll try to include one or two of your letters each issue.

Be as succinct as possible since space is limited. Send your letters to [AEA.Retired@arizonaaea.org](mailto:AEA.Retired@arizonaaea.org). Use letters to editor in the message line. Or send by regular mail to the return address on this newsletter, attention. Conduit.

## More News You Need

### Arizona's Premier Retired Education Association (Yes, that would be us!) Launches Web Site

After 21 years as the premier organization for retired public education employees, AEA-Retired, the leading resource for retired educators and ESP, announced the launch of an all new website.

([www.azretired.com](http://www.azretired.com))

With innovative features, easy-to-navigate pages, enhanced print and larger images, the site includes expanded information, new ways to view chapters, opportunities, publication archives, helpful links to



ASRS and the AZ Attorney General Senior Page. The site provides members and potential AEA-Retired members with an even better way to get to know their professional organization.

"Since our founding in 1988, AEA-Retired has continued to create ways to connect AEA-Retired members, protect their futures, and advocate for their issues. We created the new website to provide an enhanced look and feel that reflects our pre-

Julie Horwin, AEA-Retired Secretary and Web Site designer

mium brand positioning, in order to meet the needs of all of our members." said Julie Horwin, AEA-Retired Secretary. "Consistent with our guiding principle of executing with excellence for our members, our site provides exciting new tools and features that will enhance the AEA-Retired experience." Please log on to [www.azedretired](http://www.azedretired) and bookmark the page so that you can visit us often for the most current information about Health Care Reform, AEA-Retired activities, and meetings.

See, in the next column, how you can get a chance to win \$100 just for sharing your e-mail address with us. We do not share our lists with anyone!



## WANTED

### YOUR E-MAIL ADDRESS

### REWARD \$100

You could win \$100 in a drawing for all members who share their e-mail addresses with us so we can distribute our new E-Newsletter to as many members as possible-

There are three ways to enter:

If we have your e-mail address, & are already receiving your monthly AEA-Retired E-Newsletter, you're already entered !

Send your e-mail address to [jhorwin@mindspring.com](mailto:jhorwin@mindspring.com) .  
Use the message line \$100.00 Raffle

If you're not sure, send your address and we'll check for you.

That's all there is to it! Good luck.

### BOGUS ORGANIZATION TRYING TO SCAM ASSOCIATION MEMBERS!!!

There is a bogus organization conducting a phishing scam of educators - many of them our members - that you should know about.

They call themselves the National Teachers Education Association and are using NEA's address as their contact information. The message identifies itself as coming from the Executive Secretary - Susan Landen.

The message tells recipients that they have been nominated for induction into the National Teachers Hall of Fame - and directs them through a series of internet prompts to find out more - and asking the recipient for more information.

There is a National Teachers Hall of Fame. It's in Kansas, and NEA has been a long-time supporter. But this is NOT a Hall of Fame initiative.

NEA's ITS Department has reported the information to the Anti-Phishing Working Group (APWG), <http://www.antiphishing.org>. (The APWG is the global pan-industrial and law enforcement association focused on eliminating the fraud and identity theft that result from phishing, pharming and email spoofing of all types.)

ITS suggests that members who receive a similar e-mail:

- \* Forward phishing emails to [spam@uce.gov](mailto:spam@uce.gov)
- \* Report phishing email to [reportphishing@antiphishing.org](mailto:reportphishing@antiphishing.org).
- \* File a complaint at [ftc.gov](http://ftc.gov)

NEA ITS also suggests that everyone visit the site - <http://www.onguardonline.gov/topics/phishing.aspx> - to get more information on Phishing Scams and to find out how to protect yourself.



## Insurance issues

### ASRS: New ASRS Medical Benefits Plan in 2010

By Richard Spitzer, Insurance Chair



The ASRS Board has approved a new health insurance contract for ASRS members. **Richard Spitzer** represented AEA-R on the Evaluation Committee. United Healthcare/PacificCare has received the contract and will continue covering ASRS retired members. There has been only one rate increase during the last 8 years and the

four received bids were all premium increases for next year. The Evaluation Committee decided that the UHC proposal was the most favorable in cost and coverage.

#### MEDICAL PLANS: CURRENT: NEW: % CHANGE:

##### Non-Medicare Plans -

HMO Plan	\$454	\$498	9.69%
PPO Plan - Urban	\$600	\$662	10.33%
PPO Plan - Rural	\$420	\$448	6.67%
Indemnity Plan	\$871	\$700	-19.63%

##### Medicare Plans -

Senior Supplement	\$342	\$342	0.00%
MedicareComplete Urban	\$145	\$158	8.96%
MedicareComplete Rural	\$210	\$230	9.52%

Generally speaking, coverage remains the same or has slight improvements. The non-Medicare HMO has no changes, the non-Medicare PPO has improvements, and the indemnity plan is being replaced by the same PPO plan that in-state members have. It will have a higher premium than the in-state plan, but a much lower premium than the old indemnity plan. The Medicare Advantage HMO has a name change to MedicareComplete, but no benefit changes, and the Medicare Supplement will no longer have a deductible. The difference in urban and rural Medicare premiums is due to the different reimbursements levels from the government. The old and new plan coverage and comparisons can be found on the ASRS website under the Retiree tab- Health Insurance or at [www.azasrs.gov/web/HealthInsurance.do](http://www.azasrs.gov/web/HealthInsurance.do). Dental is a separate policy and will not change and will not have a rate increase. You should receive your new information packet around October 1<sup>st</sup>.

Because the plan network now covers all members statewide (making a very large directory), provider directories will no longer be mailed to participants. You must go to an open enrollment meeting between October 19 and November 13 to receive a directory or access it online. You are also able to nominate doctors, groups, and health centers to become part of UHC's network. That nomination form will be available on-line.

### Technology changes... Steve Ramos, (continued from page 2)

I personally spent many days at the state capitol this summer, lobbying for the future of public education funding and retirement issues. I was pleased to see many AEA-Retired members joining me. Thanks to all those who marched, sat, watched and waited, as well as those who emailed and made calls. We made a difference. If you are not already signed up for AEA's email updates, please join us as a "cyber-lobbyist" by going to the following web address and signing up. <http://capwiz.com/nea/az/mlm/signup/>. The budget battle continues and AEA-Retired needs your voice.

Finally, a comment about where many people get their news and the negative effect it has had on public discourse. The passing of Walter Cronkite reminded me of the excellent job done by real journalists as opposed to what I choose to call "for profit cable news entertainers" I would also include "radio news entertainers" in my criticism. I hope you will join me in seeking out and supporting real journalists as you gather information and stay informed on important issues.

(Steve attends all of the meetings of ASRS and monitors their activities for you, the members of AEA-Retired.)



**The Conduit**



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Julie Horwin	Secretary
Jean Stephenson	Treasurer

**Conduit** Editor  
Frank Bing

## 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 can contact Chairperson **Gary Mehok** at LOJO40@cox.net. *We would love to have chapters in the northern part of the state. Currently, our northernmost chapter is in Prescott Valley.*

**Glendale Chapter:** Glendale met on September 10. The speaker was David Mitchell, AZ state director for AARP, who spoke about health care reform. Future meeting dates are 11/12/09, 2/11/10, and 5/13/10. Contact Susie Sommers for info at

**Mesa / East Valley Chapter:** The meeting dates for this year are Sept. 9, Nov. 4, Jan. 13, March 10, and May 12. For information contact **Steve Ramos** at steveramos2@cox.net or 480-924-0771.

**Tucson Chapter:** October and November meetings of this chapter are scheduled. They will be on 10/20 at 10 am in the TEA office and on 11/17 at 10 am in the AEA Southern Region Office. Contact **Aurora Aber** at TheAbers@cox.net or 520-721-7547 for information.

**Phoenix Chapter:** The next meeting is 10/15 at 10:30 am at JB's Restaurant on the West side of Christown Mall at 1818 Montebello Ave. A full agenda packed with useful info is planned. Please feel free to bring friends and spouses/ partners. Contact **Mark Rosin** at 602-859-0165 or rosin\_mark@yahoo.com.

**White Mountain Chapter:** For information about this chapter, contact **Paula Grigsby** (Overgaard) at 928-535-4353 or (pkgrigsby@frontiernet.net) or **Gary Mehok** at LOJO40@cox.net.

**Prescott Chapter:** To join this chapter contact **Helga Krantz** at bcdhelga@gmail.com.

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

**Paradise Valley/ Scottsdale Chapter:** The next meeting will be on 9/29/09 at Café Carumba 7303 E. Indian School Rd. It will be a "getting to know you" social activity. There will be a no-host bar and a \$5 charge for the hors d'oeuvres. Please bring fellow retirees, members or not. Spouses/ partners are welcome. Please RSVP to **Suzan Austin** 480-947-2089, suzanaustin@cox.net ASAP

**Sierra Vista:** This chapter had their first meeting of the year on 8/26/09. There were retirees from Elgin, Palominas, and Sierra Vista. The next meeting will be on Wednesday, 10/28/09, 5:30 pm at the Pizza Hut Bistro in Sierra Vista. Please call Sally Rosen at (520)249-0233 for more info or to RSVP

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