



THE CONDUIT

Volume 23, Issue 3

March/April 2009

aea
Retired
Your
Statewide Local

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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.arizonaea.org/pdfs/aear/aearconduit0409.pdf and set the size to 200% or more.



AEA-Retired Calendar

- April 23— AEA-Retired Annual Meeting, Mesa
- April 24-25— AEA Delegate Assembly, Mesa
- May 12— AEA-Retired Executive Board Meeting
- June 27— Outreach to Teach, NEA-Retired and NEA Student Programs, San Diego
- June 27-29— NEA-Retired Annual Meeting, San Diego
- July 1-6— NEA Representative Assembly, San Diego

AEA-Retired Annual Meeting promises great variety, great speakers, and an interactive experience

Register today and be a part of setting the agenda for YOUR association.

The AEA-Retired annual meeting will take place in Mesa at the Marriott Hotel on April 23 beginning at 9 AM. All members are invited to register and attend; the registration form is on page 5.

Guest speakers will include keynote speaker, Arizona Attorney General **Terry Goddard**, and **Paul Matson**, Executive Director of the Arizona State Retirement System. Both speakers promise to be informative and entertaining.

In addition, AEA-Retired President **Linda Somo** will lead an interactive large and small group activity around a process to develop a strategic plan for your organization. We've grown to nearly 2000 members, and we want to be sure we represent our members in a way

which will reflect their needs and desires. What better way to accomplish this than to include all interested members in the strategic planning process?



Left: Keynote speaker Arizona Attorney General **Terry Goddard**; Right: Arizona State Retirement System Executive Director **Paul Matson**

AEA launches online voting; new system is fast, easy, and secure

February 12 marked the beginning of a new system of voting in association elections which could lead to greater participation by members in electing their leaders. It eliminates the need for local associations to conduct elections on behalf of AEA, and it also eliminates the need for postage to mail ballots back. The process is incredibly simple. Voting deadline is midnight, April 10.

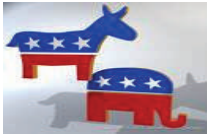


Here's how to vote. Go to the AEA web site at www.arizonaea.org and click on NEA-RA Vote Online, located under Resources on the right side of the page. Login to the safe and secure voting area. Your username is your first initial and full last name (no spaces, commas, or apostrophes). For example, Frank Bing would use FBing for the username. Your password is the last four digits of your social security number. Once you are logged in, you are eligible to vote on any ballot listed for you. Click on the ballot and follow the instructions. You will have a chance to review your choices before you click on the large VOTE button to cast your vote. You will then be given the opportunity to print out a copy of your completed ballot. Nothing could be easier.

To request assistance, or to request a paper ballot in lieu of the online ballot, contact AEA Elections Committee staff liaison Chris Mayer at 800-852-5411, or 602-264-1774, ext. 143.

No home computer? No problem!

Free online services are available at every senior center in AZ as well as most public libraries. Call **Julie Horwin**, 480-419-0332, with your home mailing address to receive a listing of all libraries and senior centers and complete, easy-to-follow instructions for getting online.



LEGISLATIVE UPDATE

BY JULIE HORWIN,
LEGISLATIVE CHAIR

In the November 2008 election, 73% of Arizona voters age 50 or older voted! This sends a clear message to our legislators at the State Capitol that Arizona's retired teachers are not here just to be served but are ready to serve those who need our help.

Our successes on individual legislation and campaigns, such as helping to defeat the Proposition 101 "medical choice" ballot initiative in 2008, are relevant to all the residents of Arizona as well as ensuring the well-being of retired education employees. Our victories also imply, dear readers, that we need to begin talking in earnest to our fellow retirees who vote. We need to make certain that we have our common issues well articulated so that our votes send a clear message: we want our legislative issues to be heard, to be taken seriously, and to be acted upon in a positive, thoughtful way.

So what is our message? We are an organization that is not Democrat or Republican or Independent. But do we have common values? Yes, we do!

* Advocate the appropriate funding of education in the schools of Arizona. Each of us is still connected in some way to a child or children in Arizona. We did not resign from our profession; we only resigned from our position.

* Keep the ASRS a strong, viable entity on which education retirees can depend.



Julie Horwin

* Advocate for the best "cost of living increase" that will keep retirement both dignified and realistic.

* Advocate for appropriate tax structures in Arizona that are not overly dependent on one mode, or place, of taxation; for example, sales tax or construction.

Be assured that any legislative issues of great concern to retired public school employees, as well as to the general education community, are followed by AEA and AEA-Retired. Appropriate levels of input are made to legislative officials on all such matters of interest.

AEA-Retired President Linda Somo, Steve Ramos, our AEA-Retired member who chairs the ASRS committee and attends every monthly meeting, and Richard Spitzer,

our AEA-Retired representative on the ASRS Health Committee, report each month on any issues/bills/initiatives that are being discussed.

However, we cannot make our voice known without your help.

Our success is directly related to the strength of our membership. Make your voice heard! With your support we will be successful!



ASRS Advances Legislative Changes To "Return To Work" Law

by Steve Ramos, ASRS Committee Chair



Steve Ramos

The Arizona State Retirement System (ASRS) has returned to the legislature with a familiar package of legislative initiatives. ASRS believes the following three changes to The Plan would add stability to the fund.

1. Changing the calculation of a member's average monthly salary from the highest 3 years to the highest 5 years.
2. Raising the points for Normal Retirement from 80 to 85
3. Limiting a member who terminates employment after five or more years to a refund of only 25% of their employer's contribution.

These changes would apply **only** to new employees hired after the effective date of the legislation. AEA has not yet taken a position on the changes but is studying them and gathering information.

The ASRS has also introduced legislation making some changes to the original "Return To Work" law. These changes attempt to address the liabilities that are being created in the fund by retirees returning to work through a private contractor. ASRS hopes to mitigate the problem by charging employers an Alternative Contribution Rate. At this time the bill's future is uncertain. Both AEA and AEA-Retired have been very involved in negotiating the language in this bill because we have an interest in maintaining a healthy defined benefit retirement system. That said, AEA has not taken a position on this bill and continues to work for legislation that is in the best interest of all members.

Third Quarter Total Fund Review. ASRS financial consultant, Terry Dennison, prepared a report that looked at the numbers through November 30, 2008. He told the Board that "the financial markets have been devastated and the impact is global." "It took us 25 years to get into this mess; it will take a long time to get out." The market dropped 49.2% on March 24, 2000. It took 1,826 days (5 years) to get back to where it was when it started. Dennison reminded the Board that "if you lose 50% of market value, you need a 100% return to get your money back." As of December 19, we had gotten 20% back.

Despite being well diversified, ASRS investments were down across all caps (large, mid, and small) and all styles (value, core, and growth). ASRS actually was more conservative than most funds and as a result may fare better than funds such as California's CALPERS, which had recently invested heavily in real estate. Performance for the fund was -8.2% for the quarter and -16.3% for the year. The fund has approximately \$19.5 billion as of November 30, 2008.

In December, the ASRS Board received a

PRESIDENT'S MESSAGE

BY LINDA SOMO

"It was the best of times. It was the worst of times." When Charles Dickens first wrote these famous lines almost two centuries ago, he probably didn't realize the timelessness of his prose, or how often it would apply to future years. Currently, Americans (and much of the rest of the world) find themselves in one of those periods.

For retirees, the "golden years" can be the best of times, but given current economic conditions, and health care costs, many seniors are experiencing the worst of times. As individuals, we can do little to control the economic conditions that are affecting our lives. However, as part of a larger group, such as AEA-Retired/AEA/NEA, we can find our collective voice and influence those who are in a position to make positive changes.

But first, we must decide exactly what we want. How do we want to change health care? What services do we require in order to maintain a high quality of life? What investments do we need government to make in order to ensure a viable economy for all future generations? What is our responsibility as citizens to improve our society and economy?

Likewise, we also need to decide how we want our Association to function. What services do we expect from our Association? How can a professional association help to make our lives better? What exactly do we expect from our Association? What are our responsibilities as members?

Answers to all of these questions may be as varied as the opinions of our members. Before we can begin to answer, we must first come together to discuss our differences and agreements. **You** can help in this process.

AEA-Retired is beginning a strategic planning process that will determine how your Association will function for the next five years. There are several ways that you can participate:

- * Attend the Annual Meeting on April 23rd and participate in strategic discussions (fill out and return the registration form included in this newsletter)

- If we have your e-mail address, respond to the e-mail survey that will be sent to members in late April and will also be included in the June-July issue of *The Conduit*

- * Attend the July 14 Strategic Planning Meeting (from 9:30-4:30) at AEA Headquarters in Phoenix (lunch and snacks will be provided). Let me know if you are interested in attending this by e-mailing lasomo@orbitelcom.com or calling 602-574-1473.

You are invited to participate in any or all of these opportunities to set the future of your Association. By determining the future course for our Association, we may in part provide that, for our members, this **will be** "the best of times."



President Linda Somo

DOVE Program

An AEA-endorsed provider since 2001

Discounts On Vehicles for Educators, Support Professionals, and Retirees



Larry Green, AEA member and former car salesman, has created a way to take the hassle out of buying a new or used vehicle. Larry does all the work, but you reap the huge savings.

Visit <http://doveprogram.org> or call Larry at 602.290.6212 or 1.800.881.3683 to get information or to request a quote.

DOVE has been providing quality service since 2001 to teachers, support professionals, and retirees.

NEW! Larry has partnered with Enterprise to provide *certified*, well-maintained used vehicles as part of his service. Call today.

A Good Reason to Join AEA-Retired



Judy Moy

Judy, a bundle of energy and enthusiasm, became active in AEA-Retired immediately after her retirement. She became a life member of NEA-R years earlier, because "I wanted to continue working on AEA initiatives as soon as I retired."

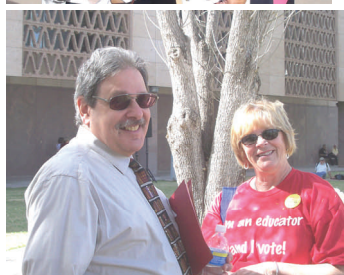
Judy does an excellent job of chairing our Elections Committee and also serves on our Audit Committee. This photo was taken at March 4 Schools at the state capitol.

Correction: In our first issue of this year, we had photos of a Social Security demonstration at the offices of Senator John McCain where we referred to "the 42nd birthday of Social Security." One of our sharp-eyed readers wrote to remind me that Social Security is indeed 73 years old. He's correct, and I thank him for pointing out the typo. As the late Paul Harvey would say, "Now, you know the rest of the story." FB



Rally in support of public education draws huge crowds to the capitol; AEA-Retired members do their part

On March 4th, AEA members, including many AEA-Retired members, parents, and allied organizations, including the Arizona AFL-CIO, descended on the State Capitol to make known their feelings about the brutal, unprecedented slashes to the state education budget. Crowd estimates showed about 10,000+. This was not the end of the protest, but the beginning. Continue to call and e-mail your state legislators and let them know that “education cuts never heal.”



Clockwise from top left: Conduit Co-editors Suzan Austin and Frank Bing; A group of our members took a break from activities to pose for this photo; Steve Lindner, Judy Moy, and John Campbell were on hand to lobby; Julie Horwin and Luci Messing, TEA share a serious discussion; Gary Mehok and John Campbell discuss the price of tea in China (just seeing if you're paying attention); Steve Ramos participates in one of many “lawn discussions”; the crowd, which stretched from the capitol building to 15th Avenue, was large and enthusiastic; Los Dos Panchos!— Frank Bing and Phoenix Chapter president Frank Sacco; Michael Gordy and his wife Penny; Beauties and the Beast— Linda Somo, Marion Pickens, Aurora Aber, Frank Bing, and NEA Vice President Lily Eskelsen; Steve Lindner and Judy Moy share a light moment



Editors' note: We want to feature YOU, our members. We need photos where you, in your capacity as an AEA-Retired member, are participating in Chapter, community, or political activities. Send us the photos at AEA.Retired@arizona.org, or by snail mail at our return address, (located on page 8), c/o The Conduit. Please identify all people in the photo and tell what the event is and include your phone number. We will return all photos after we scan them. Help us to add variety to our photo essays. Thanks.

Elections for vice president and board representatives to be held on April 23 at the AEA-Retired Annual Meeting in Mesa

On Thursday, April 23, 2009, all members attending the AEA-Retired Annual Meeting, whether or not they are delegates to the Delegate Assembly, will vote for a **Vice President** and **2 Representatives-at-Large** to serve two-year terms on the Executive Committee. The candidates are

Vice President — Frank Bing, Ken Freed

Representatives at Large — Shirley Boswell, Steve Linder, Cindy Michels, Bernadette Presloid, Mark Rosin, Richard Spitzer, Linda Thicken

In addition, nominations for officers and board members may be made from the floor at the Annual Meeting prior to speeches and voting.

Your vote is your voice; make sure yours is heard on April 23



Above left, ARA Board member Bill Dolphin, Linda Somo, ARA Board member Sue Dolphin, John Campbell, Frank Bing;
Above right, ARA President Doug Hart with Frank Bing

Along with many other unions and union groups, the Arizona Chapter of the Alliance for Retired Americans came out on March 4 in support of public education. AEA-Retired is a founding member of the Arizona Alliance, so **you** are automatically a member. John Campbell serves as the vice president of ARA, and Frank Bing serves as an ARA vice president representing AEA-Retired.

Cut here and send by April 8, 2009

AEA-Retired Annual Meeting Thursday, April 23, 2009 Registration Form

The **\$20** non-refundable registration **fee** is payable by check or money order to **AEA-Retired** and must accompany this form by Wednesday, **April 8, 2009**. Send to: **AEA-Retired, 345 East Palm Lane, Phoenix, AZ 85004-1532**. (Registration fee & form are required of all members and guests.)

Name _____

Address _____

City, State _____ Zip _____

Phone _____ E-mail _____

Please circle:

Require a vegetarian lunch? Yes No

Require or use special accommodations? Yes No

If so, what? _____

AEA-Retired: News and Views You Can Use

Saving Money (we all want to); generic meds at Costco incredibly inexpensive

By Frank Bing, AEA-Retired Vice President



A little while back, I received an e-mail from a friend advising me to check out medication prices at Costco.com. When I did, I was astounded to find that I can save over \$30 on *each* of my generic medications over what I've been paying for three-month supplies of maintenance meds through Pacificare! For me, that means a savings of \$600+

a year. I immediately decided that this was too good not to share with *Conduit* readers, especially those who have Medicare, Part D, and get caught paying full price after they fall into the "donut hole."

To check out what *you* can save, log on to www.Costco.com and click on the pharmacy link. Have your prescription bottles with you when you go online. You can then see right on the screen what your generic meds will cost you. If you decide to switch your prescriptions, you can do so by mail, or if you live close enough, you may just walk in to a Costco pharmacy. By law, you do not have to be a Costco member to use the pharmacy.

There are other places which offer reduced prices for generics, but some we cannot mention because of their virulent anti-union stances.

Who is that cat in the hat?



AEA-Retired Board member **Aurora Aber** read to Reynolds Elementary students in the Tucson USD on Monday, February 9, 2009, during For Love of Reading Week. Aurora visited 13 classrooms and had a wonderful reception from the teachers and staff of the school from which she retired. Aurora has done this for the past three years since retiring from Reynolds. She receives a warm welcome each year from the great teachers and staff.

DO YOU have something you'd like to share with our readers? Drop a note and photos to AEA.Retired@arizonaea.org

Monthly online newsletter coming to you

We now have a monthly online newsletter and want to be sure that you receive it. To keep it out of your "junk mail," please add the following to your address book:

AEARETIRE jhorwin@mindspring.com

AEA-Retired has much to offer members which you will be learning about in upcoming weeks by reading the E-Newsletter. For those of you who have been around AEA-Retired for a while, tune in, you might be surprised to learn what is new!

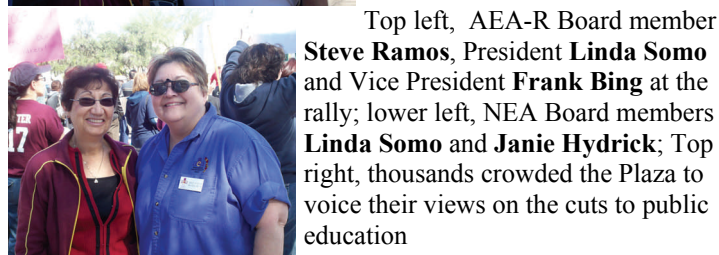
Join your colleagues who are receiving The Conduit online; save paper, printing, and postage

We have been transitioning slowly to non-print mode with *The Conduit*. What are the advantages to you? You receive your newsletter in a format which allows you to manipulate the size of print and pictures and you receive your newsletter earlier than those who must wait for the printing and mailing. It also saves us publication costs so we can use that money for other ways to serve you. Take a test drive at <http://www.arizonaea.org/pdfs/aear/aearconduit0409.pdf>.

If you want to get on the e-mail list, send an e-mail to AEA.Retired@www.arizonaea.org, with *Conduit* in the message line. Give us your name and postal mail address and the e-mail address where you want to receive *The Conduit*. Your name will be removed from the paper copy list.

Statehood Day Education Rally at the Capitol draws thousands from all education stakeholder communities

Members of AEA, ASBO, ASBA, ABEC, and scores of parents showed up at Wesley Bolin Plaza on Statehood Day, February 14, to protest the radical cuts being made to public education at all levels. Make sure you are in constant contact with your legislators to let them know about the violence they are perpetrating on public education students and employees.



Top left, AEA-R Board member **Steve Ramos**, President **Linda Somo** and Vice President **Frank Bing** at the rally; lower left, NEA Board members **Linda Somo** and **Janie Hydrick**; Top right, thousands crowded the Plaza to voice their views on the cuts to public education



The Tucson IMPACT group of mentors and protégés at one of their meetings. AEA-Retired program coordinator Claudia Jensen has developed a great working relationship with the University of Arizona

AEA-Retired IMPACT mentoring program updates from Tucson and Phoenix

The AEA-Retired mentoring program, AZ IMPACT (Intergenerational Mentoring Program Attracting and Connecting Teachers), is working with future teachers in both Phoenix and Tucson.

The group in Phoenix, led by **Linda Thieken**, had a small lunch-on get together in the fall. The intended focus was resume writing and interviewing. The discussion moved on to classroom management and ended up being a fabulous session! The protégés left with more information and suggestions than they ever dreamed possible. In February, the group attended a session at ASU held for those interested in student teaching in the fall. In March, there is a meeting of the mentors interested in planning and strategizing to make the program more interactive. Linda stated, "I am really excited about the future. We have 43 mentors, and they are absolutely fabulous."

In Tucson the program is focusing on recruiting only juniors. Program Coordinator **Claudia Jensen** said, "We feel that a two-year relationship may be more lasting and lead to a continued bond when the students leave the U of A."

There was a Mexican picnic in October in conjunction with a recruiting push for the newly formed University of Arizona Student Program chapter. AZ IMPACT Chairperson **Paula Grigsby** attended. Because the event was held at the Education Building, we were able to attract some faculty. The head of Elementary Education is very interested in forming a coalition between AEA-Retired and her office. A holiday party in December was well-attended. All the retirees brought some kind of holiday food to share. There a short meeting, after which **Steve Linder** and **Marilyn** and **Ken Freed** gave dreidel lessons!

We applaud all the mentors who are helping tomorrow's teachers!

Steve Ramos, Richard Spitzer represent AEA-Retired at NEA Pension Benefits Forum

Steve Ramos and Richard Spitzer travelled to Washington on November 11-12 to attend NEA's annual meeting on pension benefits. They gathered a great deal of info regarding the current state of pension plans nationwide, differences between defined benefit and defined contribution plans (DB is better!), how actuarial influence what a plan will do, and a variety of other topics. AEA-R can use the info they obtained to assist our members in understanding this complex issue.





Left: NEA Vice President Lily Eskelsen and Steve Ramos. Lily's topic was "The Importance of Retirement Security."

Right: NEA-R President Barbara Matteson, Richard Spitzer, and Steve Ramos. Barb is also a proud member of AEA-Retired.



Left: Steve and Richard speaking with John Jensen from Nebraska, a member of the NEA-Retired Advisory Council. The nine member council is the top governance group in NEA-R.





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|-----------------|----------------|
| Linda Somo | President |
| Frank Bing | Vice President |
| Julie Horwin | Secretary |
| Jean Stephenson | Treasurer |

Conduit Co-editors
Suzan Austin 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. The 2007-2008 Chair of the Chapters Task Force is **Gary Mehok**. Anyone interested in forming a new chapter can contact Gary at LO-JO40@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: We met on Feb. 12, and our guest speaker was Doug Kilgore from AEA. New officers were elected in November. Congratulations to Susie Sommer, Karen Aborne, Steve Poe, and Bob Aborne. The next meetings will be on May 14 and September 10 at 4 pm at the Ironworks Restaurant at Bellair Golf Course, 17233 N. 45th Avenue (1/4 mile north of Bell Road at the Bellair Golf Course). For more information contact **Susie Sommer** at 623-931-6209 or ssommer114@aol.com.

Mesa / East Valley Chapter: The past two meetings of the year were held on Nov. 12 and Jan. 14 at 11:00 am on the 8th floor of the Mesa Bank Building, 63 E. Main St. Sean Mabrey from AEA Member Benefits spoke to the group on Nov. 12. Linda Somo and Steve Ramos discussed ASRS, the legislature, AEA-Retired, AEA, and NEA at the January meeting. The meetings for the rest of the year are scheduled on March 11 and May 13. For information contact **Steve Ramos** at steveramos2@cox.net or 480-924-0771.

Tucson Chapter: A holiday meeting was held on December 17 at the AEA Southern Region office. The January 21 meeting at the TEA office was well-attended and the speaker from the ASRS did an excellent job explaining health insurance issues. Our next meeting was February 18th at the AEA Southern Region office with featured speaker, Betty Stauffer, of the Literacy Volunteers of Tucson. We have scheduled April 15th for the AEA-R presentation titled "Five Wishes." The meeting will be at 2:00 pm, tentatively at the TEA office. There will be a \$1.00 charge for the pamphlet per participant. Contact **Aurora Aber** at TheAbers@cox.net or 520-721-7547 if you will be attending so we can order the necessary pamphlets.

Phoenix Chapter: There were 19 members at the meeting on Tuesday, October 21, at 10:30 am at the Hometown Buffet on the southwest corner of 15th Avenue and Bethany Home Road. **Steve Ramos** spoke and answered questions about the Arizona State Retirement System. Old cell phones and eye glasses were collected for the Lions Club, teddy bears for the police department, and empty pill bottles for the homeless shelter. For information regarding future meetings, contact **Frank Sacco** at 602-279-5196 or fsacco1@cox.net.

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

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

Yuma Chapter: Please contact **Bernadette Presloid** at 928-782-7691 or dettep@juno.com if you are interested in participating in this chapter.

Paradise Valley/ Scottsdale Chapter: Plans are being made for a meeting this spring. If interested, contact **Linda Thicken** 602-996-4398 or **Julie Horwin** 480-419-0332 for information on this chapter.

Sierra Vista: Our *newest chapter* held its organizational meeting on October 28 at 5:30. **Sally Rosén** (azcatsally@aol.com) is looking for new members. Contact her for info regarding the next meeting.

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