



# THE CONDUIT

Volume 23, Issue 4

June/ July 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/aearconduit0609.pdf](http://www.arizonaaea.org/pdfs/aear/aearconduit0609.pdf) and set the size to 200% or more.



## AEA-Retired Calendar

June 27— Outreach to Teach, NEA-Retired and NEA Student Programs, San Diego

June 27-29— NEA-Retired Annual Meeting, San Diego, CA

July 1-6 — NEA Representative Assembly, San Diego, CA

July 14— AEA-Retired Strategic Planning, AEA Office, Phoenix

July 15-16— AEA Leaders' Conference/ Board Retreat, Wigwam

## Annual meeting tackles Strategic Planning; officers and board members elected; delegates raise big bucks for NEA/AEA Funds



Delegates to the AEA-Retired Annual Meeting meet in small groups to discuss Strategic Planning

AEA-Retired members from around the state gathered the day before Delegate Assembly to do the business of your association. They engaged in Strategic Planning, honored **Barb Matteson** (see story below), elected board members, raised money for the NEA Fund for Children and Public Education, and were treated to two great speakers, AZ Attorney General Terry Goddard and Paul Matson, Executive Director of the Arizona State Retirement System.

President **Linda Somo** and Secretary **Julie Horwin** led delegates through the first stages of Strategic Planning. The exercise was enthusiastically received by members. Planning will continue with an all member survey and a second

meeting on Tuesday, July 14, 9:30-5, at the AEA building. All members are invited to attend.

Terry Goddard addressed scams directed at older people and told what to look out for. His presentation was very entertaining and informative. Paul Matson discussed the state of the retirement system (it's good), and both speakers answered questions from the audience.

Delegates raised over \$1,600 for the NEA Fund (a record!). They also raised \$4,800 for the AEA Fund.

**Frank Bing** was elected Vice President and **Steve Linder** and **Linda Thieken** were elected to the Board of Directors.

## Barbara Matteson receives the Les Reynolds Distinguished Senior Service Award

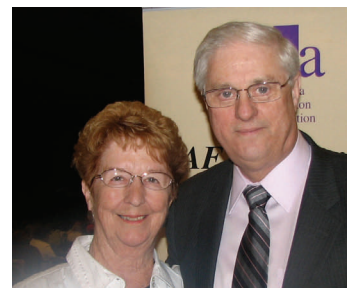
Longtime AEA-Retired member and current NEA-R President **Barbara Matteson** was selected to receive the Les Reynolds Award, the highest honor bestowed by AEA-Retired. It was presented by **Kathy Campbell** and **Bertha Myers**, Awards Committee co-chairs.

Barb believes that every educational decision is a political decision and feels that our members need to be active in the political process. Through Barb's leadership in AEA-Retired, a proposition which gives constitutional protection to the state retirement fund was placed on the ballot and passed overwhelmingly. She was instrumental in obtaining the right for retirees to have their dues deducted from their retirement checks. Barb was also appointed to the 2005 White House Council on Aging.

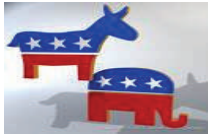
As NEA-Retired president, Barb works to protect Social Security, to fix Medicare Part D, and to protect our defined benefit plans.

Barb is also very active in the Democratic Party and serves on Congresswoman Gabrielle Gifford's Senior Advisory Council. She also serves in many other civic and professional organizations. We are very proud of Barb!

To view a video tribute to Barb produced by AEA-Retired Secretary **Julie Horwin**, go to [WWW.Youtube.com](http://WWW.Youtube.com) and type Barbara Matteson into the search box.



Our two *national* presidents, Barbara Matteson and Dennis Van Roekel



## LEGISLATIVE UPDATE

BY JULIE HORWIN,  
LEGISLATIVE CHAIR

Last June we were ending the 2008 Legislative session on a positive note because we had a governor who worked with both sides of the political aisle to create a budget plan. While not everyone would get what they wanted each year, she was fair, transparent and open.

The 2008 Legislative-enacted All-Day Kindergarten was a wonderful legacy Governor Napolitano left that benefits all Arizona citizens. She worked hard to collaborate in order to bring a dream to fruition.

During the November 2008 elections, AEA did everything right: we campaigned, we contributed, we teamed up on phone banks and volunteered countless hours. AEA-Retired has been noted as a powerful, active group during many campaigns by those who respect our activism and high voting turn-out. Many candidates are counting on just that same level of activism in the 2010 elections.

So what happened to create the conservative legislature that resulted in such devastating budget cuts to education this year? The gerrymandered legislative districts in Arizona and the better-administered tactics of the Republican party allowed conservatives to dominate the 2009 Arizona Legislative session.

Arizona is actually a rather progressive state – as evidenced by more progressive congressional candidates being elected in state-wide congressional districts which are not so gerrymandered. When the gerrymandered legislative districts don't have impact,



Julie Horwin

Arizona votes progressively.

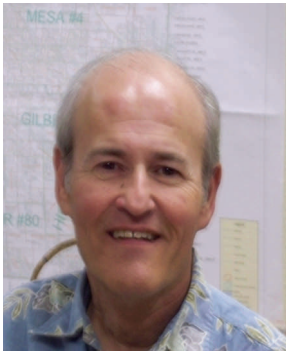
In the polarized legislative districts where the election is totally decided in the primary, most voters don't vote. Then the far left and far right candidates are given a free ride into the state legislature. Only four legislative districts in all of Arizona can truly be called "up for grabs" by either party. The other 26 districts are either going to definitely go Republican or definitely go Democrat.

That would not be all bad if more people would understand this and vote in the primary elections. More moderates would then be able to get elected, and our legislature would be more open to debate issues instead of relying on the totally hidden machinations such as we saw in this year's legislative session.

The 2008 collapse of the stock market and failed banks caused huge problems for the 2009 legislature. Arizona's constitutional requirement to balance the budget has overshadowed all other issues. Cutting spending dominated the session. Because I am writing this in May 2009, by the time you read this article sine die may have been declared and we may know the outcome. However, as it stands now, the conservatives at the state legislature only last week finally shared their budget recommendations. They allowed no debate or input from their own members or Democrats.

(continued on page 7)

## ASRS awards health care contract for 2010



Steve Ramos  
ASRS Committee Chair

A large crowd was present at the May 15<sup>th</sup> ASRS Board Meeting to find out who would win the contract to provide future health care benefits to ASRS members. The process began months ago with the creation of a health insurance Evaluation

Committee. AEA-Retired member, **Richard Spitzer**, was our representative on the committee. His job was to help review and evaluate proposals from four competing companies, Humana, Pacific Care/United Healthcare, Extend Health, and Coventry Life & Health.

The committee met seven times in three and four hour work sessions. Each company

submitted volumes of information to be analyzed by ASRS. The committee looked at the following areas:

- Quality or value of the network
- Quality or value of the benefit plan
- Cost and performance guarantees
- Method of approach
- Experience, expertise, and resources

Committee members were given information on practitioners, specialists, hospitals, and drug networks. Company representatives were brought in to answer committee questions and explain why their company would be the best fit for our members.

PacifiCare, bought by United Healthcare in 2006, won the bid. The committee felt PacifiCare had a more extensive network in Arizona and, by not switching companies, the disruption for current members should be minimal.

Members will definitely see their premiums increase because, among other reasons, insurance companies will receive 5.5% less from Medicare starting in 2010. Out-of-state coverage for members under 65 should im-

prove because PacifiCare now has the advantage of United Healthcare's national network. Open enrollment will be October-November, and coverage begins on January 1<sup>st</sup> 2010.

On July 1<sup>st</sup> PacifiCare is adding an HMO option for the rural counties of Apache, Navajo, Mohave and Gila. Members across the entire state will now have a choice of an HMO with lower premiums or a PPO with more choice of providers. ASRS has been encouraging PacifiCare to add to their doctor and hospital networks across the state, especially in rural counties.

## INVESTMENTS

ASRS investments continue to fluctuate with the market. The economy remains in recession and is not expected to recover until the third quarter of this year, at best. Growth is predicted to remain slow well into 2010 and possibly 2011. As of May 15<sup>th</sup> 2009 the ASRS fund value was \$19,919,865,080. The ASRS continues to be rated one of the best retirement systems in the country.



# PRESIDENT'S MESSAGE

BY LINDA SOMO

Who says you can't teach an old dog new tricks?

In the recent balloting to elect AEA delegates for the NEA Representative Assembly, all locals were required to conduct their elections online for the first time. While the active locals did manage to increase the percentage of those who actually cast ballots (from around an average of 9% in the past to a new high of around 14%), guess what group posted the highest number of members voting online? None other than AEA-Retired! Over 42% of AEA-Retired members voted online and demonstrated their expertise at adapting to new procedures.



President Linda Somo

Further proof of your flexibility was evident at our Annual Meeting where 74 of you eagerly participated in the beginning of our Strategic Planning Process and helped us to develop the survey that appears in this issue of *The Conduit*. If you haven't already responded to the online survey, please take a few minutes to do so now or complete the paper insert and return it to AEA-Retired, 345 E. Palm Lane, Phoenix, AZ 85004 by July 7th. Your answers will help give direction to those who will be planning for the future of your association.

As I mentioned in the last issue of *The Conduit*, if you would like to be a part of the next step of our Strategic Planning Process, please sign up to attend the one-day session on Tuesday, July 14<sup>th</sup>, at AEA Headquarters in Phoenix. Contact me at 602-574-1473 or [lasomo@orbitelcom.com](mailto:lasomo@orbitelcom.com), and join your colleagues for a fun-filled day of important work to determine the future course of your association.

Elsewhere in this newsletter, there is an article about the **Every Member Option** that was adopted at the AEA Delegate Assembly. All AEA members will be asked to contribute annually to three very important funds: the AEA Foundation for Teaching and Learning (educational grants and scholarships); the AEA Fund for Children and Public Education (political action funds and campaign contributions); and the Education Improvement

Fund (to support or oppose ballot propositions which affect public education or employees). If we truly want and expect positive changes for public education in Arizona, we must be willing to change our approach to fundraising for political action that will help us elect friends of public education. I am confident that AEA-Retired members will again demonstrate their leadership and adaptability by responding positively to this new approach.

For those of you who annually renew your membership by paying with a check or credit card, I want to encourage you to show your flexibility by changing to dues deduction from your pension check. For the small sum of \$6.25 per month (or just \$4.17 for those who are NEA-Retired Life Members), you gain the confidence of knowing that your membership is ongoing and won't accidentally be cancelled. Additionally, **you will get a \$10 rebate the first year that you sign up for dues deduction**, and you save your association the time and expense that it costs to send and process annual renewals.

AEA-Retired, you are awesome! We "old dogs" can still teach the "young pups" how to adapt and change.

## Monthly online e-newsletter coming to you!

In addition to our print publication, we now have a monthly On-line E-Newsletter, and we want to be sure that you receive it. It contains information that is time-sensitive about the legislature, ASRS, and articles of interest to AEA-Retired members.

Please send your email address to [jhorwin@mindspring.com](mailto:jhorwin@mindspring.com) so that you can be put on the list to receive the monthly newsletter.

You will be delighted to learn how much AEA-RETIRED has to offer our members!

Note: To keep the e-newsletter out of your "junk mail," please add the following to your address book: AEA-RETIRED [jhorwin@mindspring.com](mailto:jhorwin@mindspring.com).

## 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

Richard Spitzer

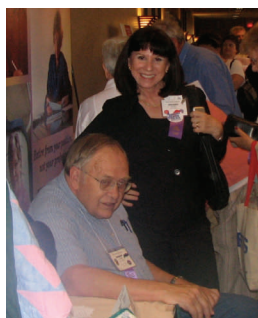
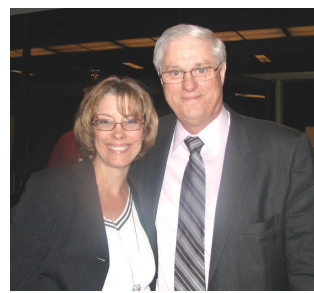


Richard is a member of the Legislative and ASRS Health Insurance committees. He did a spectacular job of informing the association leadership about the NEA Pension Benefits Forum he attended on our behalf. Richard worked diligently as our representative on the ASRS committee which helped select our health care provider. (see story on page 2)



## *AEA-Retired Annual Meeting and AEA Delegate Assembly; your representatives were there!*

As you can tell from the photos, delegates to the AEA-Retired Annual Meeting and the AEA Delegate Assembly worked hard and played hard! How many folks do you recognize?





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

**AEA Delegates pass “every member option” dues assessment; opt out/ in provision included; new category of membership approved**

Delegates to this year’s DA passed by a large majority a new business item which establishes an optional dues assessment to improve three areas. Retired members would be asked to contribute only half of what active members would give. There is an “opt out” provision for active members who do not wish to contribute, but because of the nature of our dues, retired members would have to “opt in.” The mechanism for that provision is being worked on as we go to press.

Retired members would be asked to contribute \$6 a year above their dues amount. It would be divided as follows: \$2.50 per year to the AEA Foundation for Teaching and Learning, \$2.00 per year to the AEA Fund for Children and Public Education (PAC), and \$1.50 per year to the Education Improvement Fund to support pro-education ballot initiatives and oppose anti-public education initiatives.

Another new business item passed by the delegates established a new membership category, that of Associate Member. Associate Members are those who wish to support AEA and public education, but who do not qualify for any other membership category. They have no voting rights but would receive publications and e-mails which would keep them up to date on issues around public education.



Three generations of AEA members; Jason Freed, Lily Joanne Freed and Ken Freed.

Shortly after the NBI passed, Lily Joanne Freed, the granddaughter of AEA-Retired members Ken and Marilyn Freed, and the daughter of AEA Active members Jason and Emily Freed, became the first member in the new Associate category and was introduced to the delight of the assembly.

### ***Take the Strategic Planning Survey***

As you read in the President’s Message, we’re doing strategic planning to make sure your association serves your needs. If you have not already taken the survey online, we’d like you to complete the survey inserted in this newsletter and return it before July 7. Your other option is to complete it online at

[http://www.surveymonkey.com/s.aspx?sm=E1VssUesz1AQnQarDk3PXg\\_3d\\_3d](http://www.surveymonkey.com/s.aspx?sm=E1VssUesz1AQnQarDk3PXg_3d_3d)

Either way, you’ll help us to make your association more responsive and member-friendly.

If you already completed the survey, please do not take it again.



### ***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, Helen Arnold, Paula Grigsby

Note: Since the Annual Meeting Marion Pickens has had to resign her seat due to conflicts with other obligations. Shirley Boswell, (not pictured), was appointed by President Somo to serve for a year in place of Marion.

### **Tucson and East Valley Chapter meetings**

Tucson Chapter April/ May meetings



East Valley April Chapter Meeting



## More News You Need

**Editor's note:** You may have heard about a flaw in the Economic Stimulus Package that may have caused under withholding for retirement plans. NEA Government Relations recognized the problem and lobbied on behalf of retirees so we would not get surprised at tax time. Here is the most recent press release from Diane Shust, Director, NEA Government Relations. Thanks to our Legislative chair, Julie Horwin, for keeping us up to date on this very important issue.

### IRS issues new notice which addresses withholding consequences for pensioners; new rules are in place thanks to NEA lobbying

Diane Shust, Director, NEA Government Relations:

The IRS has issued a **NEW** notice addressing an unintended consequence of the American Recovery and Reinvestment Act (Economic Stimulus Package) regarding retiree pension withholding.

You may recall that in implementing provisions regarding the Making Work Pay credit, the IRS created a situation where retirees subject to new withholding tables could have an under-withholding on pension income, and find themselves unexpectedly owing taxes at the end of the year. We had previously advised you to notify retired members about the need to adjust their withholding to avoid this penalty.

The IRS has now announced an optional procedure for pension plans that would offset the withholding reduction created by their earlier instructions. The announcement can be found at <http://www.irs.gov/pub/irs-pdf/n1036p.pdf> <<http://arizonaaea.list-manage.com/track/click?u=b09485839278c6a561f2b9050&id=96b42d8846&e=de9b259c4c>> . A more detailed summary is provided below.

#### Consult Your Financial Advisor

Please note that because pension plans do not have to use this option, retirees should continue to consult with financial advisors regarding whether to change their withholding.

#### IRS Announces Withholding Adjustment Option for Pension Plans and Provides Taxpayer Education

As part of a wider outreach effort to educate taxpayers about the benefits they will receive under the American Recovery and Reinvestment Act, the Internal Revenue Service today released new withholding adjustment procedures for pension plans.

In February, the IRS issued revised withholding tables incorporating the Making Work Pay Tax Credit, one of the key provisions of the American Recovery and Reinvestment Act. **That change resulted in more take home pay for more than 120 million Ameri-**

**can households and provided an immediate economic stimulus. The new procedure for pensions will make withholding more accurate for pension recipients.**

While the newly announced procedures apply only to pension payments, the IRS is gearing up for a wider outreach campaign to educate pensioners and other taxpayers about the withholding tables and Recovery payments. The IRS will work with partner groups to provide taxpayers information to make sure they have the appropriate withholding for their situation. The IRS will also work on developing a variety of information products, including brochures, video and audio material to help educate taxpayers.

**The change announced today will help some pensioners avoid a smaller refund next spring or even a balance due in limited situations.**

A wide variety of factors, such as outside jobs and other earned income, can affect how much, if any, withholding is needed by people receiving a pension to satisfy their annual tax liability. **The optional adjustment procedure which may be used by those paying pensions is available in Notice 1036-P, Additional Withholding for Pensions for 2009. The on-line version of Publication 15-T, New Wage Withholding and Advance Earned Income Credit Payment Tables, will be updated and available next week.**

Pension payors (ASRS, for example) are *not* required to use this new procedure and may continue to use only the February 2009 withholding tables. **For plans that adopt the new procedure, withholding on pension payments will be automatically adjusted with no action needed by pensioners. The IRS is also encouraging pension payors who choose to implement the new withholding adjustment procedures to contact retirees who previously submitted a Form W-4P, Withholding Certificate for Pension or Annuity Payments, requesting additional withholding after the February withholding tables were issued.**

Those who should pay particular attention to their withholding include married couples with two incomes, individuals with multiple jobs, dependents, some Social Security recipients who work and workers who do not have valid Social Security Numbers. Depending on their personal situation, some people could have less withheld from their paychecks than they need or want. **People who believe their current withholding is not appropriate for their personal situation can perform a quick check by using the IRS withholding calculator on IRS.gov. Any necessary adjustments can be made by filing a revised Form W-4, Employee's Withholding Allowance Certificate, with their employer.**

For more information visit IRS.gov <<http://arizonaaea.list-manage.com/track/click?u=b09485839278c6a561f2b9050&id=2804421fbf&e=de9b259c4c>> . Taxpayers and payors can download forms and publications from IRS.gov or request a free copy by calling toll free 1-800-TAX-FORM (1-800-829-3676).

We will continue to keep you updated. Questions? Please contact Julie Horwin, AEA-Retired Secretary, [jhorwin@mindspring.com](mailto:jhorwin@mindspring.com)





## Join the Heat Wave in June!

### **Legislators and the Governor need to continue hearing about how draconian cuts will damage public education; sign up to participate TODAY**

During June, retirees, teachers, parents, and taxpayers will be at the Capitol every Tuesday, Wednesday, and Thursday, assuming the budget battle is still raging. The Legislature expects us to all go away and leave them alone, but we are going to make it extra hot for them instead. Join us to stop the massive cuts to education and present options to invest in Arizona's future.

Retired teachers have always answered the call in situations like this, and we hope this time will be no different. To find out how and when to participate, go to <http://www.arizonaaea.org/politics.php?page=438> or call AEA at (602) 264-1774 and ask about Heat Wave information.

### Legislative Update (cont'd from page 2)

But they didn't stop at making dramatic cuts that would negatively impact every child in Arizona (except those going to private schools – which took very light hits with almost no impact). No, they added into the budget the following in order to decrease the ability of educators to lobby:

- The statement that "The governing board shall remove union representatives from the school district payroll."
- Language that requires a teacher to repay a school district for the cost of a substitute teacher if the teacher engages in a lobbying activity. (This is aimed largely at AEA's lobbying grass-roots efforts.)
- Removed the language that requires a school board to notify a provisional teacher of nonrenewal by April 15; thus, there would be no date in statute set for this notification.
- Removed the contract dates (between March 15 and May 15) by which districts are required to offer teaching contracts for those teaching over three years. Thus, there would be no date in statute set for contracts.

Do you think that the above provisions in the budget bill were in answer to the education and support groups who engaged in grass-roots lobbying efforts in order to voice their desires that the legislature raise taxes a little rather than to cripple an already under-funded public school system?

And, unlike Gov. Napolitano, Gov. Jan Brewer, did not step in to moderate the conservative line, other than say now and then, "We should raise taxes in order to fill the budget deficit" (that is equal to almost half of the entire Arizona budget of an already small 9 billion dollars!)



**2009-2010 AEA-Retired Officers:** Kathy Campbell, Past President; Linda Somo, President; Jean Stephenson, Treasurer; Frank Bing, Vice President; Julie Horwin, Secretary

### **An important message from Daina Swinford, AEA-Retired Membership Chair**

The 2009-2010 AEA-Retired annual membership renewal forms will be mailed in June. Please respond as soon as possible so that we do not have to expend additional dues dollars on follow-up letters in July and August.

**Important note:** This does *not* apply to members who use "dues deduct" as their method of payment through the ASRS. You will be renewed automatically. This saves you time and the association money. If you have questions or wish to switch to "dues deduct," please call Membership Chair Daina Swinford at 602-696-2458.



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An affiliate of NEA-Retired

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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. Anyone interested in forming a new chapter can contact Chairperson **Gary Mehok** at [LOJO40@cox.net](mailto: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:** On May 14 the chapter met 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). There was a presentation by Hospice of the Valley. The next meeting is September 10. For more information contact **Susie Sommer** at 623-931-6209 or [ssommer114@aol.com](mailto:ssommer114@aol.com).

**Mesa / East Valley Chapter:** The last meeting of the year was held on May 13. Doug Kilgore discussed the AEA Heat Wave planned for June at the Capitol. The meeting dates for next year are Sept. 9, Nov. 4, Jan. 13, March 10, and May 12. For information contact **Steve Ramos** at [steveramos2@cox.net](mailto:steveramos2@cox.net) or 480-924-0771.

**Tucson Chapter:** We met on April 15 and saw the "Five Wishes" presentation given by **Frank Bing**. At the May 13 meeting we elected new officers: **Aurora Aber**, Chair; **Juan Zuniga**, Vice-Chair; **Chip Parsons**, Secretary; and **Jan Goeller**, Treasurer. Our next meeting will be August 5, 2009. Contact **Aurora Aber** at [TheAbers@cox.net](mailto:TheAbers@cox.net) or 520-721-7547 for information.

**Phoenix Chapter:** A meeting was held on May 19 at the Hometown Buffet on 15th Avenue. 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. A busy agenda included planning for the coming year. The next meeting is Oct. 15. Contact **Mark Rosin** at 602-859-0165 or [rosin\\_mark@yahoo.com](mailto:rosin_mark@yahoo.com).

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

**Prescott Chapter:** We had a meeting April 29 at the Asian Buffet in Prescott. A big thank you goes to **Steve Ramos**, our Legislative Chair, who informed us about the doings at the State Capitol. We are looking forward to a meeting in the fall with a candidate for Secretary of Education. To join this chapter contact **Helga Krantz** at [bcdhelga@gmail.com](mailto:bcdhelga@gmail.com).

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

**Paradise Valley/ Scottsdale Chapter:** Plans are being made to have a meeting in the early fall, possibly at someone's home. All members, including those substituting or from out-of-state, are welcome to join. Contact **Suzan Austin** 480-947-2089, **Linda Thicken** 602-996-4398 or **Julie Horwin** 480-419-0332 for information on this chapter.

**Sierra Vista:** This newly-formed chapter is open to all members in the southern region of the state. **Sally Rosen** was appointed chairperson at the initial meeting. At the January 14 meeting held south of Sierra Vista, NEA member benefits were discussed. The March 31 meeting was held at Ricardo's Restaurant in Hereford. **Andrea Dalessandro**, a retired educator and member of AEA-Retired, spoke. She was a candidate for the legislature in 2008 and 2010. Newly-retired AEA members were invited to the final meeting of the year on May 27 at the Peacock Restaurant in Sierra Vista. The next meeting is August 26 at the Pizza Hut Bistro in Sierra Vista.

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## ***Strategic Planning Survey***

AEA-Retired is currently assessing our needs based on a strategic planning model. We'd like as many members as possible to give us input as we proceed through the process. Please take a few minutes to complete this survey (front and back) and return it to AEA-Retired SP Survey, 345 E. Palm Lane, Phoenix, AZ 85004. Or you may go online at [http://www.surveymonkey.com/s.aspx?sm=E1VssUesz1AQnQarDk3PXg\\_3d\\_3d](http://www.surveymonkey.com/s.aspx?sm=E1VssUesz1AQnQarDk3PXg_3d_3d). Please do not respond if you have already done so on the AEA-Retired e-mail newsletter. Deadline for completion is **July 7**. Thanks.

The following 10 questions will help us continue to create a positive, helpful experience for you and others who join AEA-Retired. Your answers will be reported anonymously, not attached to you in any way. Your name/address will be kept confidential.

### **1. Why did you originally decide to join AEA-Retired? (Check all that apply.)**

- ☐ To give back to the profession
- ☐ To take advantage of Member Benefits
- ☐ To keep up with trends about the profession
- ☐ To network with retired & active colleagues
- ☐ To be a part of a united voice in lobbying/political activities for Education locally, statewide & nationally
- ☐ To receive AEA/NEA/AEA-Retired Magazines
- ☐ To take advantage of volunteer opportunities
- ☐ To continue my affiliation with my professional organizations, AEA & NEA

### **2. Other reasons you joined not mentioned above (Write your answer.)**

### **3. Please rate the importance to you of the following AEA-Retired member benefits, services, and opportunities.**

Not at all important      Not very important      Somewhat important      Very important      Extremely important

Information and  
Monitoring of AZ State  
Retirement System

Presentations:  
Preretirement, 5 Wishes,  
Social Security, T.E.F.,  
ASRS, Medicare Part D

Member Benefits/discounts,  
Having a local chapter in  
my area

Communications:  
Conduit, E-Newsletters,  
Emails directly to you, NEA  
This Active Life, AEA  
Advocate

Intergenerational Mentor  
Program (IMPACT)

Social Networking

Leadership Opportunities  
Monthly Executive Board  
Meetings

NEA-Retired  
Conferences/Meetings

Political information:  
Local, State, National  
Public School &  
Retirement issues

Political Volunteer  
Activities

### **4. Write your own responses. Help us plan for any needed changes. You may leave any or all of the #4 questions blank if you desire. What are some critical activities that AEA-Retired must continue or begin doing in order to ...**

Maintain members' connections to AEA/NEA?

Monitor ASRS?

Create fellowship with members?

Engage members in political action?

Reach out to potential new members?

Other: (Please be specific)

**5. Please rate your satisfaction with AEA-Retired in the following areas:**

	Poor	Good	Excellent
Volunteer opportunities			
Local chapter			
Political activities			
Membership outreach			
Social networking			
ASRS Information			
Member benefits/discounts			
Member opportunity for leadership			
Meeting locations			
Opportunities to participate in political action			
Other (please specify)			

**6. What are some activities AEA-Retired might do to develop and strengthen new leadership?**

**7. As a volunteer organization, we need people. What would entice you to volunteer?**

**8. Which of the following best describes your ability/willingness to volunteer with AEA-Retired?**

☐ Willing and able whenever requested

☐ On some occasions depending on issues that interest me

☐ Short, limited availability 1-2 hours one or two times

☐ Unable to participate

☐ Other (please specify)

**9. AEA-Retired has a limited budget. Each of the below items represents a potential cost. Rank the following in importance so the most important items will have more money earmarked, and the less important items will have less money earmarked. Please put only one check under "Least important," one check under "somewhat important," one check under "important," one check under "very important," and only one check under "critically important" in order to "force rank" your priorities. (Those with more than one check in a particular column must be disqualified.)**

**In the next five years, AEA-Retired might be more successful if there was an increased focus on:**

	Least important	Somewhat important	Important	Very important	Critically important
Engaging more members to be more active in AEA-Retired activities such as political action/volunteering					
More frequent chapter level meetings					
Leadership development opportunities such as attending NEA-Retired conferences					
Reimbursement for expenses so more members attend more Meetings, ie AEA Delegate Assembly					
Issue forums throughout the state					

**10. About me. I am**

Age:                      Gender:                      Employed full/part time outside of the home for pay?                      How many years have you been retired?

Were you a leader in your local active association?                      Indicate your leadership role(s):

Region of residence in Arizona:                      Greater Phoenix                      Greater Tucson                      Southern AZ                      Northern AZ

Please return this paper survey or complete the online version (don't do both) by **July 7** to  
AEA-Retired SP Survey, 345 E. Palm Lane, Phoenix, AZ 85004.  
Thanks for being an integral part of planning our future.