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## Members help Board plan actions and strategies to meet goals of AEA-Retired in new year



**2017-2018 AEA-Retired Board:** L to R, Seated: J. Zuniga, J. Horwin, S. Austin, L. Somo; Standing 1st Row: S. Boswell, T. Roach, B. Matteson, M. Freed, A. Myers, L. Messing, S. Sommer, M. Calhoun, N. Putman, M. Smith; 2nd Row: A. Cicero, S. Ramos, S. Linder, K. Freed; not pictured: D. Barlow, G. Mehok, C. Wittig, L. Wittig.

Send your email address to  
jhorwin@mindspring.com

## WIN \$100

If we already have your email address, you are already entered into the \$100 AEA-Retired Raffle! Good Luck!

The AEA-Retired officers and Board of Directors, Chapter Chairs, Committee Chairs, and other members kicked off the new school year with a two-day meeting and Committee Day on September 12 & 13, that set the agenda for activities for the upcoming year. Major emphasis will be on improving communications with members; increasing member involvement; safeguarding our public pension system, Social Security, Medicare & Medicaid; and promoting quality public education for all of Arizona's students.



Membership & Membership Outreach Chairs Michele Smith, Nancy Putman, Shirley Boswell, and Tricia Roach discuss plans for expanding membership.

Following the entire group's participation in Membership Outreach and Political Action Committee meetings during the two days, smaller break-out committee meetings were held for Audit, Fundraising, Chapter Development, Grants, Constitution & Bylaws, Annual Meeting, and Intergenerational Mentoring. A wide variety of activities were planned for member participation including promoting and expanding Chapters, two advocacy training days, and lobby days at the Capitol. *(See page 5 for more photos.)*



**Chapter Chairs, L to R:** Tricia Roach, Flagstaff; Ann Myers, Scottsdale/PV; Rob Johan, Yavapai; Michele Smith, Phoenix; Susie Sommer, Glendale/West Valley; Nancy Riley Scottsdale/PV; Sally Rosen, Southeast AZ; not pictured: Marion Pickens, Tucson; Janie Hydrick, East Valley



### AEA-Retired Calendar

- October 10 —AEA-Retired Board Meeting, Phoenix
- November 8—M.O.R.E. Mixer, Phoenix
- November 9—M.O.R.E. Mixer Tucson
- November 14—AEA-Retired Board Meeting; Phoenix
- December 5-6 —M.O.R.E. Leadership Convocation, Phoenix
- December 7—Advocacy/Lobbying training, Phoenix; & Dec. 11, Tucson
- December 12—AEA-Retired Board

## ASRS UPDATE BY STEVE RAMOS



### ASRS Board to vote in October on pre-funding the PBI & lowering the return assumption.

The Arizona State Retirement System (ASRS) ended the 2017 fiscal year in June with almost \$38 billion and an estimated return on investments of 13.9%. As much as ASRS likes to celebrate a good year, it also continues to look ahead 30 years and more to plan for the retirement of new educators entering the profession today. ASRS must make reasonable assumptions about the future and develop policy and methods that will provide for benefit security, which is the ultimate goal of any defined benefit retirement plan. Our members' benefits should be there when they need them and as long as they need them.

ASRS has received the results of an independent Experience Study, the purpose of which was to guide ASRS board members in setting future policy. The study looked at things like expected investment returns, retiree life expectancies, and the probability of future Permanent Benefit Increases (PBI). The report predicts that future economic growth is likely to continue to be suppressed compared to historical levels and that retirees will continue to live longer than earlier generations. Although the study cannot predict a PBI, it does recommend that ASRS follow new Government Accounting Standards and begin pre-funding the PBI.

#### Board to vote on key issues in Oct.

ASRS board members will vote on a handful of changes at their October meeting. The changes will affect active ASRS members more than retirees. Maybe the most important vote will be to lower the assumed rate of return from 8% to 7.75% or 7.50%, a decision many large public pension plans have already made. This assumption is used to predict what percentage of future benefit payments will be covered by investment return and what percentage by contributions. Lower returns equal higher contributions, as do longer life expectancies.

Other changes focus on policy that could contribute to more stable and equitable contribution rates in the future. In particular, the board will vote to

begin pre-funding the PBI.

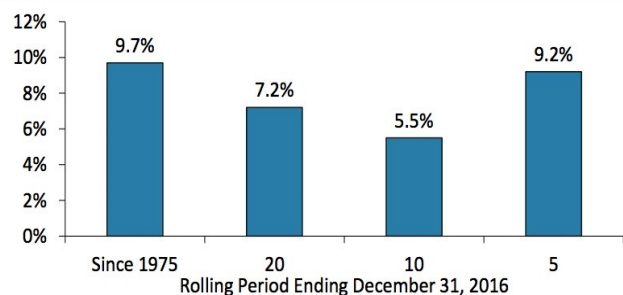
The PBI was designed to help retired members keep pace with inflation, but its payment was never tied to any cost of living index. Historically, funds to pay for the PBI have come from excess earnings, defined in state statute as earnings exceeding 8% over a running period of 10 years. Once a PBI is added to pension checks it cannot be reduced or eliminated. Even in years when there are no excess earnings the ASRS must continue to pay the PBI.

This vote does not change the PBI formula or the chances that most retirees will see a PBI in the future. Some retirees may remember generous PBIs awarded in years prior to 2006. Although state statutes entitled them to this benefit, it was never paid for up front with increased contribution rates. Also know that recent pension reforms have eliminated the PBI for members hired after September 12th, 2013.

#### Contribution rate continues to rise.

The current contribution rate is 11.50%. Unfortunately there is no magic formula that will cause high contribution rates to immediately return to the levels many retirees remember prior to the economic crash in 2008. The changes proposed would create more stable contribution rates, but those rates are predicted to edge up at least another percentage point in the short term, level off and then begin to gradually fall over the long term. AEA

#### Annualized Yields Based on Market Value of Assets





## PRESIDENT'S MESSAGE

BY JULIE HORWIN



### *We must/will fight for public schools in Arizona that are worthy of our children!*

It's the start of the new school year, and if you are anything like me, you still feel that the fall is the start of something big – and that you are a part of something bigger than yourself.

That feeling of being a part of something bigger than myself is what keeps me working, talking, walking, engaging, negotiating to help create better schools for students, and a dignified retirement for their teachers.

Okay. I admit it. I talk to a lot of people. Sometimes I feel like I should have a bullhorn as I crow about you and the work you do, the messages you relay to others about Arizona education. I talk about you to young teachers, and I talk to men and women who have been retired for 20+ years.

Those young teachers love their jobs, and adore their kids, just like you and I did, but we are going to lose almost 50% of them in the next few years. Arizona is not supporting its teachers in their quest to create the best learning environment for their students. What is needed in addition to the love for their students are books, supplies, a comfortable safe place to learn, a small class size and decent pay. It just isn't happening now in Arizona. So what can we do about it? **We have learned that it doesn't matter how strong, how dedicated, how forceful we are at the state legislature, if we don't have parents with us, we can be ignored.**

Parents are usually passionate about their child's education. So, how do you organize the large group of parents of the one million children of Arizona? No one has ever done it before. Until now. In Arizona. **How did that happen?**

The state legislature did it for us. They expanded the voucher system to the largest in the U.S. In effect, your tax dollars are paying for three separate school systems: private and religious schools; charter schools with little or no accountability for the taxpayer money; and finally, the traditional public schools that 80%, or 800,000, of our students attend.

This unfair set-up made parents from all over Arizona finally push back. The Save-Our-Schools petition circulation to vote down the voucher expansion was a strong, well-organized parent effort that had not been seen in Arizona in decades. And AEA-Retired members helped. We circulated petitions, recruited our friends and families, and donated small amounts of money that added up to thousands. Thank you. And we will continue to help through our donations, networking with others, and being activists.

AEA-Retired has continued to build alliances to succeed in our goals. We work with the AFL-CIO, the Alliance for Retired Americans, the Labor political action team called Arizona Wins, and many other groups. **But the most important voices we listen to are yours.** Please find us on Facebook (AEA-Retired), visit our website ("google" AEA-Retired) or contact me. When I speak, it is the strength of your voices that makes leaders listen. **Thank you.**

**Welcome newly retired members! We're so glad you joined us!** Welcome to our newest AEA-Retired members! Congratulations on your retirement – I'm wishing you fun, laughter and happiness in this next phase of your life. Whether you are newly retired, or like me, a long-time retiree, if you have questions about your retirement, how we can help you, or how you can help fulfill the aims of the Arizona Education Association, please don't hesitate to contact me.

*Julie*

Julie Horwin, President,  
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Barbara Matteson & Julie Horwin at the NEA-Retired Annual Meeting (see story on page 6).

# LEGISLATIVE UPDATE

*By Luci Messing*



## SB1431 referendum qualifies for ballot; public to vote on repeal of voucher expansion for all students.

### The People Have Spoken!

Save Our Schools successfully submitted enough valid signatures to place the repeal of SB1431 to the voters. Approximately 108,000 signatures is more than enough for Proposition 305 to be on the ballot in November 2018. This is one of the most amazing success stories involving a grassroots effort by average moms, teachers, community members and public education supporters.

However, the supporters of vouchers have no intention of going away quietly. American Federation for Children, along with national dark money groups, have filed a lawsuit to have all petitions deemed invalid. Their claims are frivolous and petty, but they do not want this issue to be voted on by the people. They know that the majority of individuals do not support draining more funds from our public schools. Unfortunately, there is the possibility that the Legislature could rescind the law and make a vote on the matter moot. We need to monitor the situation and stay involved. Go to [sosarizona.org](http://sosarizona.org) for more information.

The 2018 Elections present us with a major opportunity to elect candidates whose values align with our priorities. We need to adequately fund public schools and protect our pensions. We should address the needs of the citizens of Arizona instead of national special interests.

There are exceptional candidates running for Governor, Secretary of State, and Superintendent of Public Instruction. There will also be a race for US Senate and each congressional district will be electing a representatives. With your help we can change the direction of our state for the better.

The AEA-Retired Political Action Committee will develop the plans for this year’s course of action. We will once again conduct our **advocacy/lobbying trainings (December 7<sup>th</sup> in Phoenix and December 11<sup>th</sup> in Tucson)**, coordinate trips to the Capitol to lobby our elected officials, participate in phone banks, and help candidates with canvassing. Details will be forthcoming.

For more information, contact Luci Messing at [lucibmessing@cox.net](mailto:lucibmessing@cox.net). We may not be able to do everything individually, but together we can all do something.

Let’s make this the **Year of the Retiree**. We will be reaching out far and wide to encourage all AEA-Retired members to get involved. We have the numbers to truly impact the results of the election. Begin working out. It’s time to “flex our muscle”.

### Get informed! Stay informed! Be involved!

\*\*\*\*\*

## New application can stop unwanted spam cell phone calls.

Are you constantly being annoyed by unwanted cell phone calls that bother you all day? Calls from numbers you don’t recognize? Calls you answer and no one’s there?

They are spam calls “pfishing” for active numbers so that they can sell your phone number to solicitors. If you block the calling number, the spammers will simply change a few numbers and call you again.

Now there are cell phone applications that can help. Go to the app store and search for “spam cell blocker”. Good rules for a successful search should include:

- 1) it must be free to use;
- 2) the details seem to fit your needs;
- and 3) there are hundreds of positive reviews. Be sure to read the negative reviews too. They give lots of information about which one to choose.





# Photo Gallery of Board Meeting & Committee Day 2017



Board members, Chapter Chairs, and Committee Chairs were joined by other AEA-Retired members to set goals and plan activities for the 2017-2018 year during their two-day meeting September 12-13 (see story on page 1).





# AEA-Retired well represented at NEA-Retired Annual Meeting and NEA Representative Assembly

*By Suzan Austin*

## NEA-Retired Annual Meeting – Horwin re-elected to Executive Council

It was a pleasure and an honor to represent AEA-Retired, along with President Julie Horwin and former NEA-Retired President Barbara Matteson, at the NEA-Retired Annual Meeting and NEA Representative Assembly this past summer in Boston.

At the NEA-Retired Annual Meeting held June 27-28, our own Julie Horwin, who was the top vote-getter, was re-elected to the NEA-Retired Executive Council.

The organization bid farewell to outgoing President Tom Curran and welcomed Sarah Borgman, the newly-elected NEA-Retired President.

All three NEA officers, President Lily Eskelson-Garcia, Vice President Becky Pringle, and Treasurer Princess Moss, gave spirited speeches. NEA Executive Director John Stock and members of the NEA staff spoke about the NEA priorities and how we can get involved. A presentation by Mary Kusler, Director of the NEA Center for Advocacy, inspired the group to take action in their home states.

As usual donations to the NEA Fund for political action were spearheaded by Barbara Matteson. Arizona was a major contributor to that fund, as well as to the Jack Kinnaman Scholarship Fund.

## NEA Representative Assembly -- Delegates vow to hold strong, and defend public education

The NEA RA was an exciting event to behold and participate in, as usual. The 7191 delegates from around the coun-

try met in Boston to honor education and make decisions about the future of our organization. We also made generous contributions to the NEA Fund for Children and Public Education with over \$1.2 million raised for political action and electing candidates who support our priorities!

The Arizona delegation caucused on July 30 and every day of the RA, from July 2 – 5. AEA’s incredible Chris Mayer and officers Joe Thomas, Marisol Garcia, and Angela Philpot did a great job of guiding us through all the new business items, housekeeping duties and fundraising activities. Our delegation raised over \$18,000 for political action to elect friends of education.

A few highlights of the RA included the awarding of NEA’s Friend of Education Award to LeVar Burton, and the speeches by the Teacher of the Year and the ESP of the Year. There were 159 New Business Items submitted by delegates, and thanks to the ability to “bundle” items, we were able to consider all of them by the 8 pm adjournment on the last night.

Some hot button topics included policies on charter schools and the necessity for racial justice in education. Of note, NEA reinstated a budget allocation for retired organizing based on the success of the New Educator Project, especially in Arizona.

The speeches by Treasurer Princess Moss, Vice President Becky Pringle, and President Lily Eskelson-Garcia inspired everyone to continue our fight to defend quality public education.



Suzan Austin, Julie Horwin & Barbara Matteson at the NEA RA



## Matteson honored at NEA-Retired Annual Meeting in Boston; activism cited

AEA-Retired member, and former NEA Retired President, Barbara Matteson was honored with the Distinguished Service Award at the NEA Retired Annual Meeting held in Boston in June.

Barbara is a mentor, a strong education advocate, a political activist and an organizer. She helped to organize and pass Prop 100, the state-wide campaign that gave our pension plan constitutional protection in 1999. Political activism is second nature to Barbara. She is Co-Chair of AEA-Retired’s Political Action Committee, and for years held a similar position in the Tucson Education Association. She is a member of the League of

Women Voters, on the Board of the Arizona Women’s Political Caucus, served on the board of the Alliance for Retired Americans for five years, has worked tirelessly in numerous local and state campaigns, and has been a delegate to the Democratic National Convention. Barbara is a strong advocate for public education, women’s rights, environmental issues, and senior issues at the local, state, and national levels. Barbara continues to lead by example and truly exemplifies the qualifications of the NEA-Retired Distinguished Service Award.

## Arizona M.O.R.E. Project Grant renewed by NEA for 2017-2018

For a third year AEA-Retired will receive funding from NEA to support the Arizona M.O.R.E. Project (Mobilize, Organize, Recruit and Engage) activities. Suzan Austin submitted the grant in July and it was awarded in October.

The goals of this grant are:

- to contact and engage a target group of NEA-Retired lifetime members who retired in other states but live and vote in Arizona
- organize regional meetings for AEA-Retired members and target group in Maricopa, Pima, and Coconino (Flagstaff) counties to promote AEA and AEA-Retired activities including Read Across America, rallies at the Capitol, emailing, writing, calling and lobbying legislators, as well as to provide socialization
- increase participation in local chapters
- organize leadership convocations to create and develop new retired leaders to strengthen AEA-Retired
- engage local organizations with similar goals in planned events to strengthen our community partnerships.

The events planned for this year are the following:

- ◆ A Leadership Convocation on Dec. 5-6 in Phoenix
- ◆ A Mixer on November 8 in Phoenix, which will feature information on Medicare and education issues
- ◆ A Mixer on November 9 in Tucson, which will feature information on Medicare and education issues
- ◆ Advocacy/Lobbying Training on December 7 in Phoenix
- ◆ Advocacy/Lobbying Training on December 11 in Tucson.

**The New Educator Project: The Retired Experience** was so successful in Arizona last spring that NEA will again fund it this year. Retired educators were trained to discuss current issues and listen to the thoughts and concerns of new educators (in their first 5 years of teaching) in a targeted district. The goals are to welcome, engage, and recruit members and new leaders. For more information on this important project, or to apply to participate, contact Julie Horwin at 602-320-3093, or [jhorwin@mindspring.com](mailto:jhorwin@mindspring.com).

The M.O.R.E. organizing team includes NEA Organizing Specialist **Todd Crenshaw, Julie Horwin, Linda Somo, Steve Ramos, Barbara Matteson, Steve Linder, Luci Messing, Michele Smith, Suzan Austin, and Marilyn Calhoun** who assumed the duties of chairperson.

## In Memoriam Mary Cunningham Bishop




AEA-Retired founding member Mary Bishop passed away May 26, 2017. Before retirement, she was a teacher in the Phoenix Elementary School District for 30 years where she touched the lives of hundreds of students. During her teaching career, she was an active member of NEA, AEA and her local association.

Mary served on the NEA Board of Directors and was instrumental in establishing the NEA Human & Civil Rights Awards that are celebrated annually at the NEA Representative Assembly.

Upon retirement, Mary continued her activism by helping to implement NEA Retired and AEA-Retired as a founding member. She was the driving force behind creation of the Les Reynolds Distinguished Senior Service Award for AEA-Retired, and was the recipient of that honor in 2011.


Mary dedicated her life to improving the education of Arizona's students and was still fighting hard for quality public education up to her final days. Shortly before passing, she was a delegate to the AEA-Retired Annual Meeting and the AEA Delegate Assembly.

Arizona students, education employees, and retirees have lost a valuable advocate, and Mary will be missed by all.



Now More Than Ever,  
The Commitment Continues

### The Conduit



Your Retired  
Statewide Local

A Publication of AEA-Retired  
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**The Conduit** Editors  
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## *AEA-Retired Chapter News*

Chapters are an attempt to bring AEA-Retired closer to members. All AEA-Retired members are eligible to join a chapter where they worked or currently live. **Meetings usually include: an information program on topics such as health care, legislative updates, retirement options, and all aspects of the educational system; a business meeting; lunch or dinner; and that very important time for socializing with friends and colleagues.** Anyone interested in forming a new chapter should contact Chapter Coordinators **Susan Sommer**, [ssommer114@aol.com](mailto:ssommer114@aol.com) or **Suzan Austin** at (480) 947-2089 [suzanaustin@cox.net](mailto:suzanaustin@cox.net).

**Glendale/West Valley Chapter-** All members are invited to join us for a social and informative gathering at our dinner meetings at 4 PM which are held at the Iron Works Restaurant 17233 N. 45th Ave., Glendale. If you live on the Westside of I-17 in the Valley of the Sun, join us. Meeting dates for this year are Oct. 5, Dec. 1, Feb. 1, 2018, and April 5, 2018. For more information call **Susie Sommer** at 623-628-1935 or e-mail [ssommer114@aol.com](mailto:ssommer114@aol.com).

**Mesa / East Valley Chapter:** Meets in the 8th floor conference room at the Mesa Public Schools Bldg., 63 E. Main Street in Mesa. Guest speaker at Sept. 20th meeting was AEA Lobbyist Stephanie Parra, who presented “The good, the bad, and the ugly” from the past legislative session, and gave a preview of the upcoming legislative session. Future meetings are scheduled for: 11/15, 1/10/18, 3/7/18, and 5/9/18 at 10:45 AM. Contact **Janie Hydrick** at [Hydrick@aol.com](mailto:Hydrick@aol.com) or (480) 628-1845 for more information or to RSVP.

**Greater Tucson Area Chapter:** Meetings are the third Tues. of Sept.—May, at 10:00 AM, and alternating sites between the TEA office and the Southern Region office. Go to <http://www.azedretired.com/TUCSON/index.html> for more information, or contact new Chapter Chair **Marion Pickens** at [marionpeterpickens@gmail.com](mailto:marionpeterpickens@gmail.com) or **520-296-5908**. Other new officers are: Barbara Matteson, Vice Chair; Ramon Montano, Secretary; and Kathy Ramage-White, Treasurer. Next meeting will be October 17 at the TEA office.

**Phoenix Chapter:** Meets five times yearly in Elaine’s Dining Room at the Beatitudes at 1610 W. Glendale Ave. in Phoenix from 10:30 –12:30. We discuss important information related to education, retirement and legislative concerns, and also make time for a great lunch and socializing. Lunch is \$10. If you live in central Phoenix, please join us. The last meeting was 9/19, and future meetings are scheduled for 11/21, 1/16/18, 3/20/18, and 5/15/18. Please RSVP your attendance to Chapter Chair **Michele Smith** at 602-463-1624 or [mms7997@msn.com](mailto:mms7997@msn.com).

**Yavapai Chapter:** Met on Sept. 15 at the Prescott Family Diner in Prescott. Attendees received updates on the AEA Fund Council, AEA-Retired, educational/political developments, and identified topics & speakers for future meetings. Contact Chairperson **Rob Johan** at [johania31@gmail.com](mailto:johania31@gmail.com) or 630-430-8902 for information about future meetings.

**Scottsdale/Paradise Valley Chapter:** David Garcia will be the guest speaker at the Scottsdale/Paradise Valley chapter on Oct. 16, at 11:00 am., Denny’s Restaurant 7000 E. Mayo Blvd., Phoenix (just south of the 101 at Scottsdale Rd) Many school districts are represented by our group, so if you’re looking for a chapter in the Northeast Valley, please join us. For information contact either **Co-Chairs: Nancy Riley, 480-596-1144 or Ann Myers, 480-510-8098, or visit <http://www.azedretired.com/SCOTTSDALE/index.html>**. Everyone is welcome.

**Southeast Arizona Chapter:** Met on Sept. 6 at the Peacock Restaurant on Fry Blvd. in Sierra Vista. Contact **Sally Rosen** at 520-459-0430 or [azcatsally@aol.com](mailto:azcatsally@aol.com) for more information and future meeting dates.

**Flagstaff Chapter:** If you live in the Flagstaff area, you can’t afford to miss out on our AEA-Retired chapter meetings, held on the first Tuesday of each month, 10 AM to noon, in the basement room of Flagstaff Federated Church. We work to stay informed and support Arizona’s retirees, educators and students through service projects, political action, and constant monitoring of retirement issues at the state and national levels. We hope you will join us and lend your expertise to our efforts to support our profession and the people we serve. The last meeting was October 3. For more information and to RSVP, contact **Tricia Roach** at [trrteach6@mac.com](mailto:trrteach6@mac.com) or call 928-525-1997.