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## AEA-Retired celebrates 30 years of service to members and education community

The 30th Birthday Celebration of the AEA-Retired Annual Meeting featured outstanding guest speakers, a delicious luncheon, fun activities, the chance to win fabulous prizes, and the successful raising of funds for an important cause, the NEA Fund for Education which helps to elect friends of public education nationwide.

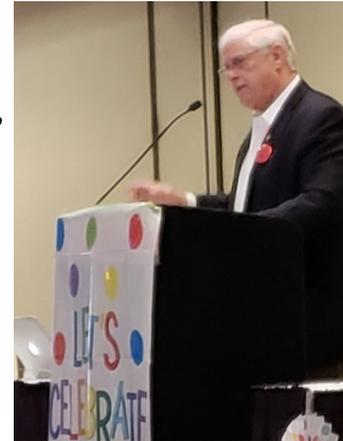
**President Julie Horwin** provided opening remarks, which included sharing a video of highlights of AEA-Retired members who have worked tirelessly over the past 30 years to protect all retirees, and to advocate for quality public education for all students.

**Political Action Co-Chair Luci Messing** presented a recap of the past legislative session. She shared a power point that indicated that the Actives' raises won't, by and large, approach 9%. Also, the Governor has returned \$100M, previously taken from education, to the classroom. \$23M was also returned to the Maintenance budget, which leaves the state only \$1 billion short in its funding of education. To add to the confusion, the legislature neglected to act so that Arizona could receive \$56 million from the Federal Government for child healthcare. This would have come without strings attached. Messing went over the highlights of this past year, which included the reauthorization of Prop 301 funding. A major failure was the legislature's inability to eliminate the 4 hour ELL block, or to pass any charter school reforms.

**Steve Ramos, ASRS Liaison**, gave an update on the Arizona State Retirement System. He stated that the ASRS is now 65 years old, is 70.1% funded, and has assets totaling \$40 billion. The fund is healthy, however, the Actives' contribution rate will tick up slightly to 11.8% of gross pay. This has the up side that the state matches, dollar for dollar, the amount that the members contribute, guaranteeing that the fund will be there when the next generation of educators retire. He also detailed some of the possible threats from unfriendly legislation that still exist.

**Keynote speaker, Dennis Van Roekel, NEA Past-President**, spoke about "Paradigm Shifts." These shifts particularly apply in today's world due to the current U.S.

**President, and what he has done to our institutions, our values, and our traditions.** Van Roekel Inspired attendees to find ways to adapt and counter the paradigm shifts facing public education and our nation.



### Suzan Austin honored as Les Reynolds Distinguished Senior Service Recipient.

Suzan Austin was selected as this year's recipient of the Les Reynolds Distinguished Senior Service Award for her many years of service as AEA-Retired's Vice President, Annual Meeting Chairperson, Chapter Chair and coordinator, and many other services to members.

*(article continued on page 5)*



Suzan Austin receives her Les Reynolds Award from President Julie Horwin and Connie 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!

### AEA-Retired Calendar



- June 27-28 —NEA-Retired Annual Meeting; Minneapolis, MN
- June 30-July 5 —NEA Representative Assembly; Minneapolis, MN
- August 28—Primary Election Day
- September 11—AEA-Retired Board Meeting; Phoenix
- September 12—AEA-Retired Committee Day; Phoenix
- October 9—AEA-Retired Board Meeting; Phoenix

# ASRS UPDATE BY STEVE RAMOS



## ASRS celebrates 65th birthday, but Permanent Benefit Increase remains elusive

In 2018, as the Arizona State Retirement System began the celebration of its 65<sup>th</sup> birthday, the total fund topped the \$40 billion mark for the first time in history. ASRS continues to be ranked among the top public pension funds in the country, winning awards for financial reporting, management and customer service. The total investment return at the end of the last fiscal year was 13.9%. That put the ASRS in the top 16% of peer plans and among top performers of all U.S. public pension funds. Year-to-date the fund has earned a return of approximately 9 percent. Even though the markets have been more volatile in early 2018, barring something unexpected happening in the next several weeks, the ASRS rate of return should finish the fiscal year on June 30, 2018 with a positive return close to 10%.

As many of you know, ASRS does not have a **Cost of Living Adjustment** or COLA. Instead, the Arizona Revised Statutes, Title 38 Section 767, outlines the provisions for providing ASRS retirees with what is known as a **Permanent Benefit Increase or PBI**. It was designed by the legislature to help offset the effects of inflation, over time, on retiree benefit checks.

Funds to pay for the PBI come from excess earnings on the actuarial value of the overall ASRS fund. When excess earnings are identified, a formula that includes years of service is used to determine the individual retired member's PBI. When available, it is applied at the beginning of the fiscal year, July 1.

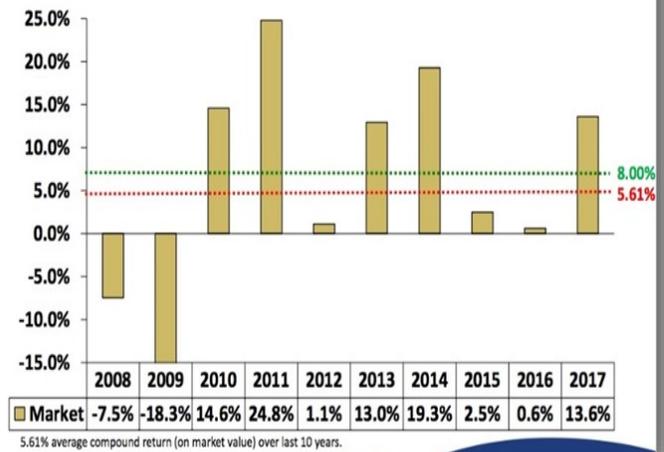
Once granted, the PBI cannot be taken away; pension checks cannot be reduced, even in years when there are no excess earnings or negative earnings. The PBI is not tied to any cost of living index or guarantee. Members who joined the ASRS prior to September 13, 2013 are eligible for the Permanent Benefit Increase. Members who joined ASRS after Sept. 13, 2013, are not eligible for the PBI.

At the end of each fiscal year the ASRS conducts an actuarial review of the defined benefit plan. This review identifies whether there are excess earnings to provide for a Permanent Benefit Increase. To determine if there are excess earnings, the fund

must have earned more than a 9 percent rate of return.

However, investment gains and losses are not applied in the same year, but instead "smoothed" over a rolling 10-year period, in order to minimize excessive increases or decreases in the employee and employer contribution rate. The last valuation showed there were no excess funds available for an increase in the PBI in 2018. As you can see in the chart below, ASRS had some bad years in 2008 and 2009 and that those years are about to drop off the 10-year average. If market returns continue to be strong and positive in the next few years the chance of a PBI could become more likely.

Estimated Yields Based on Market Value of Assets



\*\*\*\*\*

On April 27<sup>th</sup>, 2018, the ASRS Board approved a plan to return the *United Health Care Retrospective Rate Adjustment* dollars to retirees who use the ASRS health care plans. ASRS expects to release details of the plan soon, which should involve some **temporary premium reductions** beginning in January of 2019 and continuing in the 2020 and 2021 calendar years. Watch for more information.

# PRESIDENT'S MESSAGE

BY JULIE HORWIN



## *Congratulations on 30 years of activism and making a difference!*

As we begin our summer break, I want to thank you for allowing me to continue to serve you in my capacity as president of AEA-Retired. I am proud and honored, but, mostly, humbled to hold this position.

There is much to applaud in our work from this year. And I mean it – I hope as you read this, you give cheers and applause to YOURSELVES and the work we have accomplished together.

- ◆ The success of our New Educator Listening Tours enabled us to talk with educators in their schools, and we converted more active teachers into becoming AEA members than many other efforts in the state.
- ◆ We held Arizona legislators accountable for their “not so good” votes through our M.O.R.E. Legislative Forums – including Senator Bob Worsley, whose vote was the final vote to pass the largest voucher program in the entire United States of America.
- ◆ We played a major role in ensuring that the more than 500,000 students on free and reduced breakfast and lunch subsidies didn’t miss a meal during the teachers’ walkout. You raised the money for the food and logistics necessary to make sure that no child went to bed hungry.
- ◆ You have carried and garnered signatures for the INVESTinED Petitions, and worked on validating those signatures – 6 days a week – for over 5,000 in just the first week.

For these and so many more actions, such as continuing the conversations as we email you, and for joining in the fun, informative activities in one of our nine local chapters (a big shout out to our chapter chairs), please applaud yourselves for the work you have done this past year. I salute you for your untiring commitment in support of public education, retirees, active teachers and support staff. **Your overall advocacy for this year marks the 30<sup>th</sup> anniversary of the AEA-Retired.**

The breadth and scope of our work spans the entire state with some 4,000 members between AEA-Retired and NEA-Retired, who are those educators who never worked in Arizona but have retired here from other states and participate in our activities and communications.

We are a “doing organization.” We don’t sit on our laurels...we don’t just attend interesting conferences...and we don’t depend on the AEA staff to do our work for us.

We stand together with the AEA and as a force behind them...their members...and all education professionals – from the classroom teacher to the school bus driver and the secretaries in the office. Thank you for the work you do, the continued communication, and especially your continued membership so that our voices can be heard, loud and clear.

**A giant “welcome!” to those who have retired this month and joined AEA-Retired. Please contact me at any time for any reason. The part about my job as your president that I love most is communicating with our members.**

Phone: 602-320-3093  
Email: [Julie.horwin@gmail.com](mailto:Julie.horwin@gmail.com)  
Web: [www.azedretired.com](http://www.azedretired.com) (Just Google AEA-Retired)  
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## **Order your AEA-Retired polo shirt from Michele Smith**



We value each and every volunteer who gives their time to our organization, but here is an exceptional volunteer who we feel deserves a spotlight this month. Phoenix Chapter Chair **Michele Smith** had an idea that when we go to the state legislature and elsewhere to advocate for public education, it would be great if we could be easily recognized as a large, organized, strong voice as

visually demonstrated by our many members in attendance. She found and ordered beautiful purple (Purple Power!) polo shirts that look great for both men and women. She has ordered over 80 shirts for our members throughout the state. If you would like to order a shirt, contact Michele at [mms7997@msn.com](mailto:mms7997@msn.com). Michele’s favorite part of volunteering is working with other people.

# LEGISLATIVE UPDATE

*By Luci Messing*



## AEA-Retired political activists had a very busy year! Need to keep it going.

The Political Action Committee was very busy this year. The number of AEA-Retired political activists has been increasing on a steady basis. This will help prepare us for the November elections.

### Here are highlights of this year's activities:

- September – 2017/2018 Plan and budget established at the AEA-Retired Committee Day
- October - Provided information for the M.O.R.E socials
- November - Participated in the Gubernatorial Candidate Town Halls
- December - Held two Advocacy/Lobbying trainings
- January – AEA-Retired Day at the Capitol
- February – Held 2 AEA-Retired Days at the Capitol
- March – AEA Days at the Capitol and the RedForEd movement began
- April – Multiple actions took place such as walk-ins, rallies, marches, stand-outs and ultimately a statewide walk-out from April 26 until May 4.
- We held a training on April 24 where 60 Retirees were trained on targeting certain State Senate seats in order to flip control to pro public education candidates.
- May – Over 125 retirees attended the Annual Meeting on May 11, and 84 delegates participated in the AEA Delegate Assembly on May 11 & 12 where the INVESTinED Initiative began.

It should be noted that over 100,000 public school employees participated in walk-ins. 78% of 57,000 public school employees voted to walk out. And over 70,000 marched to the Capitol on April 26. On Friday, April 27, thousands showed up once again. Then on Monday, April 30, over 30,000 educators and community partners were at the Capitol. AEA-Retired has been there every step of the way offering our support to the RedForEd Movement.

Throughout the legislative session, activists contacted legislators and the governor on a variety of issues. Members used the RTS (Request to Speak) system, emailed, called, and met with elected officials to share our message on behalf of public education and our pensions.

### Here's a wrap up of the legislative session.

#### Budget Highlights:

- Adds \$240 million for teacher raises, most likely will not be the 9% promised
- Restores \$100 million to classrooms but can be used for support staff raises
- Restores \$23 million to building repair, technical education, early literacy

#### Budget Lowlights:

- \$16 million property tax increase for TUSD homeowners (can you say lawsuit)
- Automatic freeze on Kidscare – October 2019 (Meanwhile) \$56 million in Federal child healthcare funds will sit unspent

#### Legislative Highlights:

- Reauthorization of Prop 301 Funds – protects \$650 million annually for public education
- No additional tax cuts or school tax credits.
- Did not repeal the voucher expansion law (voters will have final say in November)

#### Legislative Lowlights:

- Failure to pass HB 2435 regarding ELL student four hour blocks
- HCR2007 will be on November ballot, and is an attack on our Clean Elections Commission
- Failure to hear any bills regarding Charter School Accountability

AEA-Retired has added new goals for us to work towards this summer. Collecting signatures for the Invest in Education Act will be a priority. AEA members are now assisting in verifying signatures as well as checking petitions in and out. In addition, we will be focusing our efforts to flip the State Senate by electing legislators who share our values for public education and protecting our pensions. Currently, there are 13 Democrats and 17 Republicans in the Senate. If we can flip two seats to Democrats, we will be able to stop bad legislation. If we can pick up three seats, we will control the Senate and one chamber of the Legislative system, thus forcing legislators to cooperate with each other. AEA-Retired intends to target LD8, LD11, and LD17. We had our first training on April 24. You will be hearing more about this soon. Stay informed and answer the call to action for the 2018 Election cycle. **Together we are stronger!**

# Annual Meeting and Delegate Assembly continued

*(continued from page 1)*

## Delegates elect Vice President and six Board Members

Retired delegates to the Annual Meeting elected **Janie Hydrick**, who ran unopposed, for Vice President. Additionally, delegates elected six At-Large members to the Executive Board. **Steve Ramos, Juan Zuniga, Larry Wittig, Kirk Hinsey, Anna Cicero, and Lucinda Michels** were all elected to three-year terms beginning June 1st, when they will join the other Board members and officers.



**AEA President Joe Thomas** brought us greetings and discussed the incredible work and organization of the RED-forED movement. He thanked the AEA-Retired members for all that they have done to help in the campaign, and reminded us that it's not over, as it will continue with the INVESTinED Initiative.



\***The 125 members and guests** who attended raised \$5255 for the NEA Fund political action committee to support pro public education candidates at the national level. The next day at the AEA Delegate Assembly, the 84 retired delegates actively participated in all the business of the Delegate Assembly, and contributed over \$6500 to the AEA Fund to help elect pro public education candidates at the state level.

\***The quilt raffle** raised \$1900 for the NEA Jack Kinmanan Scholarship Fund and the AEA-Retired budget.

\*Many thanks to **Suzan Austin, Annual Meeting Chair**, her Co-Chair **Anna Cicero**, and helpers **Norma Jimenez and AnnJi Craig –Wooton**, for all their hard work in coordinating the successful 30th Annual Meeting and hospitality suite.



# Intergenerational Mentoring completes 1st successful year

*By Maria Vinaras*

February 6<sup>th</sup> marked the beginning of ten mentoring relationships between AEA-Retired volunteer educators and Mary Lou Fulton Teachers College, TeachAZ, whose teacher candidates we had the privilege of mentoring.

Thanks to President, Julie Horwin’s strong commitment and advocacy in support of increasing teacher retention, and fostering and promoting future educators’ success in our public schools, her untiring and spirited work to achieve this mentoring goal has come to fruition.

AEA-Retired’s goal is to see our proteges begin their teaching careers prepared to face and solve challenges they may encounter with classroom management and delivering instruction. We want our educators to be successful and stay current with best teaching practices.

To that end and to support the goal of AEA-R Mentoring as it pertains to best teaching practices, we sought professional development and received training on the implementation of the Professional Learning Plan from the Arizona K12 Center. Mentors first learned of the Tool Kit in a 4-hour session and then our knowledgeable and respected colleague and Intergenerational Mentoring Program Committee Co-chair, Rae Ann Rumery, presented the use of the Professional Learning Plan to encourage teacher candidates’ reflective planning and inquiry to help them determine what they need to improve in their teaching to promote student learning. Grounding reflection and mentoring conversations in the In TASC Core Teaching Standards has provided the framework for moving these beginning teachers from developing and applying levels of sophistication in their practice to higher levels of integrating and applying.

Time has gone by quickly, but overall, we have had oppor-

tunities to be in contact with our protégés, helping each one with their unique requests, questions and concerns.

We know how much reflective teachers are needed in our public schools to help our students, tomorrow’s leaders, thrive and be successful.

We invite you to join us in our mentoring of teacher candidates. To fill out an application, please follow the link below.

<http://www.azedretired.com/intergenerational-mentoring>



Rae Ann Rumery, Co-Chair, Intergenerational Mentoring Committee, with Brianna Manheim, Teacher Candidate of the Year.



Luci Messing receives her award from Marion Pickens, former Arizona State Representative.

## *Luci Messing honored for 40 years of service.*

Luci Messing has been a champion for public education for over forty years. This included the 31 years she was a teacher in the Tucson Unified School District. She received her Bachelor’s Degree from the University of Arizona in 1977 and was recognized by the UA as the Women’s Outstanding Athlete. She taught and coached almost every sport in the Tucson Unified School District. Luci was recognized by Pueblo High School with their Very Important Person Award, Catalina High School with the STAR Teacher and Naylor Middle School with their Outstanding Teacher Award. During her years of teaching, Luci served on numerous School Councils.

She became a leader for other education employees, serving in many different elected positions and became the President of the Tucson Education Association from 2009-2011. Luci has continued to be a leader and supporter of public education as a retiree. While serving as member of the AEA-Retired Association and the Pima County School Retirees’ Association, she held appointed and elected positions in the Pima County Democratic Party. She used her organizing skills to help support candidates and encouraged people to lobby the Arizona Legislature for bills that supported public education. In 2015, she was recognized by the Democrats of Greater Tucson with their Community Outreach Award.

## AEA-Retired members work diligently to help validate signatures for INVESTinEd petition drive



Often when people think of heroes, they imagine superheroes with powers such as shape shifting, physical and mental domination. They are heroic characters who possess extraordinary talents, or the individuals that you hear about in the news that have performed one or many great acts of courage. What about our local superheroes, those everyday AEA-Retired members who give up their time to help individuals, and organizations in order to help support and reinforce our local communities?

I would like to introduce you to a team of just such individuals. Meet the team who have come in day after day, and have given 3-4 and often more hours to supporting the INVESTinED petition drive. Thank you, Maria Vinaras, Bart James, Michele Smith, Deb Cross, Diane Escalante, Roxie May, Liz Douglas, Howard Johnson, Manya Simmons, Janet Gould, Cynthia Hart-Vega, Steve and Doni Ramos, Judy Simons, Nancy Pina-Gray, Ann Myers, John Campbell, Michael Cady and Marilyn Herndon who come in almost every day, and the many others who have given their time to validate the petition signatures using computers. If you would like to join this amazing team, contact Julie Horwin, President, AEA-Retired at 602-320-3093 or [julie.horwin@gmail.com](mailto:julie.horwin@gmail.com). Come on in and join us!

### Check out these AZ summer cool spots



It is time to think about getting out of the heat of summer. Arizona has some of the most beautiful, scenic, cool places. The White Mountains are a step back into nature and quiet serenity tinged with history. Three of those places are Tonto National Bridge, Woods Canyon Lake and Zane Grey's Cabin.



Tonto National Bridge was discovered by David Gowan, a prospector who was being chased by Apaches and hid in the caves. He survived and stayed in the area the rest of his life, just ten miles North of Payson. Contact [azstateparks.com/TONA](http://azstateparks.com/TONA). Woods Canyon Lake is a short drive from the viewpoints along the Mogollon Rim in the Apache Sitgreaves National Forest. Hike, boat, fish, picnic. Zane Grey's Cabin, a replica of the author's original cabin in Payson, is a museum worth visiting. For more information go to [www.rimcountrymuseum.com](http://www.rimcountrymuseum.com).



**The Conduit**



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## *AEA-Retired Chapter News*

Chapters are an attempt to bring AEA-Retired closer to members. All AEA-Retired members are eligible to join a chapter where they worked or currently live. **Meetings usually include: an information program 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-** Glendale/West Valley chapter will be meeting Thursday, October 4, 2018 at 10 am at Biscuits Cafe, Glendale, Az. All are welcome to join us for a bite to eat and great conversation with updated information. For more information, call, text or email **Susie Sommer** at 623-628-1935 or [ssommer114@aol.com](mailto:ssommer114@aol.com)

**Mesa / East Valley Chapter:** Our chapter meets on the 8<sup>th</sup> floor of the MPS building at 63 East Main Street, Mesa. Meet and greet begins at 10:45 with luncheon at 11:00. Join us for conversation with colleagues, important information, yummy food, and fun raffles. Meetings are scheduled for Sept. 19, Nov. 14, Jan. 9, 2019, March 6, and May 8. Contact **Janie Hydrick** at [Hydrick@aol.com](mailto:Hydrick@aol.com) or (480) 963-1848 for more information.

**Greater Tucson Area Chapter:** Our May meeting had Steve Ramos as our guest speaker. He had a Power Point presentation comparing our ASRS Benefits with the other State Retirement Systems. We could tell very clearly how much better, stable and protected our retirement program is. Steve urged us all to be watchful for bills that some Legislators submit. They would like to believe that our benefits are a "tax payer gift" and not a hard earned support in our retirement. Our next Chapter Meeting will be on August 21st at the TEA Office starting at 10:00am. It will be just before the Primary Election and we will catch-up on the campaigns for the Senate candidates in our priority Districts. Our September meeting will be September 18th at the AEA Southern Region Office. We will have a presentation and discussion on the issues for the November ballot. In the meantime, we are circulating the petitions for "INVESTinED". Luci will be using the TEA Office as a distribution and collection location. For more information, contact **Marion Pickens**, Chair, at 520-296-5908 or [marionpeterpickens@gmail.com](mailto:marionpeterpickens@gmail.com)

**Phoenix Chapter:** The Phoenix Chapter had a great meeting on May 15th. Our representative from District 24, Ken Clark, spoke to our group and talked about his goals for the summer and the next legislative session. Representative Clark is running for a second term in the State House. We will continue to meet at The Beatitudes at 1610 W. Glendale Avenue every other month on the third Tuesday during the school year. Here is the schedule for 2018 -2019: Sept. 18, Nov. 20, Jan.15, March 19, & May 21. We meet at 10:30 am and usually finish at 12:30 pm. Lunch is served and the cost is \$10.00 per person. For more information, contact Chapter Chair **Michele Smith** at 602-463-1624 or [mms7997@msn.com](mailto:mms7997@msn.com).

**Yavapai Chapter:** The May 17<sup>th</sup> meeting of the Yavapai chapter of AEA-Retired was attended by 8 members. In addition to hearing a report from delegate Ted Coleman on the AEA-Retired Annual meeting and the AEA Delegate Assembly, final preparations were made for the May 24<sup>th</sup> chapter members' visit to Prescott-based Y.E.I. (Yavapai Exceptional Industries). Lastly, following the April elections, Yavapai officers for the next two years took office at the close of the meeting: Chairperson: Rob Johan; Vice-chair: LaBeth Pondish; and Secretary-Treasurer: Sherry Baca. The first meeting of the new school year of the Yavapai chapter is scheduled for 11 AM, Thursday, September 13<sup>th</sup>, at the Prescott Family Diner, 520 Miller Valley Rd., in Prescott. Contact Chairperson **Rob Johan** at [johanica31@gmail.com](mailto:johanica31@gmail.com) or 630-430-8902 for information about future meetings.

**Scottsdale/Paradise Valley Chapter:** The Scottsdale/Paradise Valley AEA-R Chapter meets at Denny's Restaurant on Mayo Blvd. and Scottsdale Rd. at 11:00 a.m. Next year's meeting dates are Sept. 17, Oct. 15, Jan. 21, Feb. 18, and Apr. 15, 2019. We collect donations to the Jack Kinnaman Scholarship Fund, and books and magazines for a local homeless shelter. Many school districts are represented by our group, so if you're looking for a chapter in the north Valley, please join with us. Everyone is welcome. For more information contact **Nancy Riley**, 480-596-1144, [rileyfam@cox.net](mailto:rileyfam@cox.net), or **Ann Myers** 480-510-8098, [azann@mac.com](mailto:azann@mac.com)

**Southeast Arizona Chapter:** The Southeast Arizona chapter met on June 4 at the Hitachi Buffet in Sierra Vista. Members signed INVESTinED petitions, celebrated the successes of the #RedForEd movement so far, and planned for the Fall activities. Next meeting will be in August! Contact **Sally Rosen** at 520-459-0430 or [azcatsally@aol.com](mailto:azcatsally@aol.com) for more information.

**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. For more information and to RSVP, contact **Tricia Roach** at [trrteach6@mac.com](mailto:trrteach6@mac.com) or call 928-525-1997.